**COMMON MARKET FOR EASTERN AND**

 **SOUTHERN AFRICA**



**REQUEST FOR PROPOSALS**

**CONSULTANCY FOR THE DEVELOPMENT OF A COLLABORATIVE INFORMATION SHARING PLATFORM**

**RFP Ref**: **CS/CC/6(776-2024)-as**

 **ISSUED ON: 25th JUNE 2025**

**CLOSING DATE: 15th JULY 2025**

For any queries on request for bids or for any question regarding the use of this template, please contact:

Head of Procurement,

COMESA Secretariat

Ben Bella Road, P.O. Box 30051,

Lusaka, Zambia
Phone: +260 211 229725/32
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**Growing together, for Prosperity**

COMMON MARKET FOR EASTERN AND

**SOUTHERN AFRICA**



**السوق المشتركة**

**للشرق والجنوب الأفريقي**

**MARCHÉ COMMUN DE L’AFRIQUE ORIENTALE ET AUSTRALE**

**Tel : +260 211 229726/29**

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**Email : info@comesa.int**

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**COMESA Centre**

**Ben Bella Road**

**P O Box 30051**

**LUSAKA 10101**

**Zambia**

**OFFICE OF THE SECRETARY GENERAL**

Ref: CS/CC/6(776-2024)-as Date: 25th June 2025

**Letter of Invitation (LoI)**

***COMESA*** is inviting eligible firms to submit technical and financial proposals for the following services: **consultancy for the development of a collaborative information sharing platform** to be procured under the Contract reference number **CS/CC/6(776-2024)-as**.

1. The Terms of Reference defining the minimum technical requirements for these services are attached as Annex 1 to this RFP**.**
2. Your proposal must be presented as per Standard Proposal Forms attached as Annex 2 to this RFP in English language and be accompanied by copies of all the indicated supporting documents. If the supporting documents are not in English, these shall be accompanied by a certified translation into English.
3. Submission of the technical and financial proposals must be in a written form to the email addresses below clearly quoting the reference number as stated.
4. You are required to submit both your technical and financial proposals at the same time but in different folders/attachments. The Financial proposal should be in pdf and MUST be password protected. Do not disclose this password to anyone until we contact you to do so.
5. Only successful firms which shall score over and above 70% in the technical evaluation shall be invited to the opening of the financial proposals. The selection method to be used is the Quality Cost Based Selection (QCBS) using the 80/20 rule.
6. Your proposal should be addressed and submitted to: ***tenders@comesa.int*** ***and copied to procurement@comesa.int***
7. The deadline for submission of your proposal, to the addresses indicated in Paragraph 6 is: **15th July 2025 at 15:00 hours LUSAKA TIME.**
8. Proposals submitted by Fax or hardcopies are notacceptable.
9. It is not permissible to transfer this invitation to any other firm.
10. The Technical Proposal will be evaluated against the following criteria.

|  |  |  |
| --- | --- | --- |
| No | **Evaluation attribute** | **Percentage Points**  |
| 1 | Firm’s Understanding of Client’s requirements | **20** |
| 2 | Approach and methodology | **15** |
| 3 | Specific Experience of the firm in carrying out similar assignments | **40** |
| 4 | Qualifications and Experience of proposed Consultant. **(Sub-criteria)** | **25** |
|  | **Total** | **100** |

The number of points to be given under each evaluation sub criteria for qualifications of Experts are:

|  |  |
| --- | --- |
| **Sub-criteria**  | **Percentage from Total Number of Points Allocated to the Criteria** |
| (i) General Qualifications | 25% |
| (ii) Adequacy for the Project | 60 % |
| (iii) Experience in Region | 15 % |
| **Total**  | **100 %** |

1. Your proposal should be submitted as per the following instructions, and in accordance with the Terms and Conditions of the Standard Contract attached as Annex 3 to this RFP:

(i) PRICES: The financial proposal shall be inclusive of all expenses deemed necessary by the Contractor for the performance of the Contract and **must not include**any of the following taxes in Procuring Entity Zambia: value added tax and social charges or/and income taxes on non-resident personnel’s fees and benefits.

(ii) EVALUATION AND AWARD OF CONTRACT:

The evaluation shall be based on the following attributes:

1. The overall responsiveness and quality of the proposal, clearly stating the understanding of the work to be performed;
2. Technical ability of the bidder to perform the required services;
3. The experience and reputation of the bidder as represented in the response and the quality of the references;
4. Cost of services. Fees and expenses will be particularly important factors when all other evaluation criteria are relatively equal.

The Technical proposal will be assigned a weight of 80% and the financial proposal will be weighted at 20%.

(iii) VALIDITY OF THE PROPOSAL: Your proposal should be valid for a period of 120 days from the date for deadline for submission indicated in Paragraph 7 above.

1. The assignment is expected to commence five (5) days after contract signing but not later than two weeks from the date of signature of the Contract.
2. Additional request for information and clarifications can be request, no later than 7 calendar days prior to the deadline indicated in the paragraph 7 above, from:

Procurement Unit

Common Market for Eastern and Southern Africa

Ground Floor, COMESA Centre, Ben Bella Road,

P.O. Box 30051, Lusaka – Zambia,

Telephone: +260 211 2297226/29.

Web: http://www.comesa.int

Email: procurement@comesa.int

**Contact person**: Alimon Sakala

**E-mail**: *asakala@comesa.int*

**ANNEXES:**

ANNEX 1: Terms of Reference

ANNEX 2: Technical Proposal Submission Forms

ANNEX 3: Financial Proposal Submission Forms

ANNEX 4: Standard Contract/Terms and Conditions

**Sincerely,**

**Signature***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Name:** Silver Mwesigwa

**Title**: Head of Procurement and General services Unit

**TERMS OF REFERENCE**

**BACKGROUND**

COMESA is a Regional Economic Community comprising 21 Member States, namely: Burundi, Comoros, Democratic Republic of Congo (DRC), Djibouti, Egypt, Eritrea, Kingdom of Eswatini, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Somalia, Sudan, Tunisia, Uganda, Zambia, and Zimbabwe. The Member States have agreed to promote regional integration through trade, infrastructure development, Industry and Agriculture and investment promotion with a view to transform into an African Economic Community with the aim of improving and uplifting the living standards of approximately 640 million people.

The Secretariat is the executive arm of the Common Market for Eastern and Southern Africa (COMESA) which is hosted by the Republic of Zambia in the capital city of Lusaka. The implementation of the Secretariat’s medium term strategic plan 2021-2025 pillars, namely market integration, physical connectivity, production integration and gender and social integration are focused on improving the social and economic status across the region. The four pillars are anchored by an efficient and effective secretariat to achieve the goal of improved economic and social status in the COMESA Region. An effective Secretariat will therefore be achieved through institutional strengthening and capacity building of staff, acquiring robust systems and structures at the Secretariat.

The Institutional Capacity Building Project (ICBP) funded by the European Union under the 11 European Development Fund (EDF) supports, among others, strengthening partnership, dialogue and communication on COMESA regional integration policies with COMESA member states, COMESA institutions, key public and private stakeholders as well as with the EU and its Member States.

Among the activities provided for communication and visibility are design process workflows, procedures for communication between the Secretariat, Member States and COMESA institutions and develop requirements and system for a collaborative information sharing platform.

A Knowledge Management/ Collaborative information sharing platform emerges as a pivotal initiative aligned with COMESA's strategy, aspiring to transition the Secretariat into a seamless and paperless environment. This transformative system is poised to revolutionize and streamline information sharing among the COMESA Secretariat, Member States, COMESA institutions, and key stakeholders. Through its implementation, significant enhancement in communication efficiency and effectiveness within COMESA is anticipated.

# PURPOSE OF THIS DOCUMENT

This document provides the necessary background information, key stakeholders and their roles, business requirement, scope of work, functional and non-functional specifications for the design, development, and the implementation of an Information Sharing platform for COMESA Secretariat. Furthermore, it specifies the key deliverables for the Information Sharing platform.

# MAIN OBJECTIVES OF COLLABORATIVE INFORMATION SHARING PLATFORM

The main objective of the Collaborative Information Sharing Platform is to enhance COMESA communication and knowledge sharing among its various stakeholders efficiently and cost-effectively. It will also enable the organization to increase the value of its intellectual capital and leverage its knowledge assets to achieve its goals. The idea is to enable corporate knowledge to be effectively shared and reused among individuals, organizational units and its stakeholders.

Furthermore, it is expected to facilitate COMESA to:

1. **Enhance Partnership and Dialogue:** Foster stronger partnerships and dialogue among COMESA Secretariat, Member States, COMESA institutions, and key stakeholders to promote regional integration policies and initiatives.
2. **Improve Communication Processes:** Develop standardized workflows and procedures for communication between the Secretariat, Member States, and COMESA institutions to ensure consistency, efficiency, and transparency.
3. **Facilitate Information Sharing:** Establish a collaborative information-sharing platform to facilitate the exchange of knowledge, best practices, and relevant information among stakeholders, including blogs.
4. **Increase Visibility and Awareness:** Enhance visibility and awareness of COMESA regional integration policies and activities among stakeholders, including its Member States, private sectors, civil societies and cooperating partners. Furthermore, the content will be available in all COMESA official languages (English, French, and Arabic).
5. **Incorporate Latest Interactive Technologies:** The objective is to enhance platform capabilities and provide a more comprehensive and interactive experience for users, which includes real-time user feedback management.

In addition, this will involve redesigning the COMESA website to:

1. **Enhance User Experience:** This includes redesigning the current COMESA website for ease of navigation, improving page load times, optimizing for different devices, and ensuring intuitive and user-friendly interactions. The objective is to create a positive and engaging experience for visitors, ultimately increasing user satisfaction and encouraging them to stay longer and explore more of the website.
2. **Improve Branding and Visual Identity:** The objective is to promote the COMESA branding and visual identity, which aligns with the secretariat’s values, communicates its unique propositions effectively, and creates a consistent and memorable brand experience for visitors.
3. **Enhance Content Strategy:** Redesign the website by reviewing the content strategy and ensuring that the website provides valuable and relevant content for the target audience. This includes reorganizing and restructuring existing content, creating new content, and optimizing it for search engines. The objective is to provide informative, engaging, and shareable content that attracts and retains visitors.
4. **Improve Search Engine Optimization (SEO):** The website redesign will include optimizing the website's structure, code, and content to improve its visibility in search engine rankings. This involves keyword research, on-page optimization, improving website speed, ensuring mobile-friendliness, and enhancing overall SEO performance. The goal is to increase organic traffic and improve the website's search engine visibility.
5. **Optimize for Mobile Devices:** The goal is to provide a consistent and user-friendly experience across desktops, smartphones, and tablets.
6. **Analytics and Data-Driven Insights**: The website redesign will be an opportunity to include analytics features to analyze the website data, such as user behavior, traffic sources, and conversion rates. The goal is to gain insights from the data and make informed decisions about design, content, and functionality improvements. By leveraging data-driven insights, the objective is to optimize the website's performance and achieve better results.

In a rapidly evolving digital landscape, staying competitive is a key objective for the collaborative information sharing platform. Incorporating these best practices will create a platform that provides superior user experience.

# EXPECTED BENEFITS OF THE IMPLEMENTATION OF A COLLABORATIVE INFORMATION SHARING PLATFORM

The expected benefits are as follows:

1. **Streamline Communication Processes:** Standardize workflows and procedures for communication, leading to improved efficiency, consistency, and transparency in interactions between the Secretariat, Member States, and COMESA institutions.
2. **Enhance Collaboration:** A collaborative information sharing platform facilitating the exchange of knowledge, best practices, and relevant information among stakeholders, fostering stronger partnerships and dialogue on regional integration policies.
3. **Increase Visibility and Awareness:** Improve visibility and awareness of COMESA regional integration policies and activities among stakeholders, including its Member States, private sectors, civil societies and cooperating partners, leading to greater support and participation in COMESA initiatives.
4. **Improve Stakeholder Engagement:** Increase stakeholders' engagement and participation in COMESA activities through enhanced communication channels and facilitated information sharing processes.

# SCOPE OF WORK

The project will entail the development, testing and deployment of a web-based collaborative information sharing platform focusing on content management system, search engine optimization, workflow, security, web analytics, interactive user experience, digital component library, digital asset management, and system integration.

**Desk Review**

Conduct desk review of the existing web platforms, digital assets, and other related systems, including assessment and determining the content presentation and the process and system requirements/specifications for the development of the COMESA Collaborative Information Sharing Platform.

**Content Management System (CMS)**

The CMS will serve as the backbone of the platform, allowing users to create, manage, and publish content efficiently. The modern CMS will provide responsive design, alignment with COMESA brand identity, multilingual support, integration of social media, compliance with regulatory requirements, and feedback mechanisms.

**SEO (Search Engine Optimization) Module**

To maximize online visibility, an integrated SEO module will ensure that COMESA’s content ranks high in search results. Key features will include:

o   **Keyword Optimization** – Improve content discoverability.

o   **On-Page SEO Tools** – Meta tags, alt text, and structured data enhancements.

o   **Performance Analytics** – Monitor website engagement and effectiveness.

o   **Automated Sitemap Generation** – Ensures content is indexed correctly.

**Analytics & Performance Monitoring**

To enhance decision-making, the platform will integrate powerful analytics tools that track user engagement, content effectiveness, and system performance.

o   **User Behavior Tracking** – Identify how users interact with content.

o   **Real-Time Insights** – Immediate feedback on traffic sources and popular pages.

o   **Custom Reporting Dashboards** – Generate reports on content performance and stakeholder engagement.

**Automated Workflow & Notification System**

An automated workflow system will streamline content submission, review, and publishing.

o   **Structured Submission Process** – Stakeholders submit articles, reports, and news via an online portal.

o   **Assignment & Approval Notifications** – Automatic email/SMS alerts for assigned reviewers and approvers.

o   **Content Review Tracking** – PR & Communication officers review and approve content before publishing.

o   **Publishing Automation** – Approved content automatically pushed to the COMESA website and social media.

**System Integrations for Seamless Collaboration**

The platform will act as a **gateway** to other COMESA applications, ensuring that users can seamlessly access relevant tools without switching platforms.

**Security & Access Control**

Ensuring **data security, confidentiality, and regulatory compliance** is a priority.

o   **Role-Based Permissions** – Control access based on user roles (e.g., Member States, PR Officers, IT Staff).

o   **Data Encryption** – Secure sensitive information both in transit and at rest.

o   **Audit Logs** – Track all user activity for accountability.

o   **Multi-Factor Authentication (MFA)** – Enhance login security.

**User Experience & Accessibility**

The platform will be designed for **ease of use, mobile compatibility, and accessibility**.

o   **Responsive Design** – Optimized for desktops, tablets, and smartphones.

* **Multi-Language Support** – Content is available in Arabic, English, and French.
* **Intuitive Navigation** – Simplified user interface for quick access to content.

**The Digital Component Library (DCL)**

The Digital Component Library will incorporate the COMESA branding and style guide containing the design elements and visual standards that all COMESA websites and applications adhere to.

**Digital Assets Management (DAM)**

The DAM will organize COMESA digital assets more effectively in a central location, making them easier to find and leverage. Other core features of DAM are robust access control management, digital rights management to implement restrictions and controls on assets, and digital asset sharing to increase collaboration.

**Training and Awareness**

Organize and facilitate the training of trainers (ToT) on the management of the platform. Training and awareness will be structured with a combination of online and physical sessions. Develop a multimedia marketing campaign on the platform and assist in launching the platform to the target group from the Member States and provide support in maintenance and monitoring the platform.

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# BUSINESS, FUNCTIONAL AND NON-FUNCTIONAL SPECIFICATIONS

#### Business Requirements

##### **Enhanced Communication and Collaboration**

* + Facilitate efficient and effective communication between the COMESA Secretariat, Member States, and COMESA institutions.
	+ Promote seamless collaboration through shared workspaces, discussion forums, and project management tools.

##### **Standardized Communication Processes**

* + Develop standardized workflows and procedures for communication to ensure consistency, transparency, and efficiency.

##### **Increased Visibility and Awareness**

* + Enhance the visibility and awareness of COMESA regional integration policies and activities among stakeholders.

##### **Stakeholder Engagement**

* + Improve stakeholder engagement and participation through enhanced communication channels and information sharing processes.

##### **Cost-Effectiveness**

* + Achieve cost-effective communication and information sharing by leveraging digital tools and eliminating reliance on paper-based processes.

##### **User Experience**

* + Provide an intuitive, user-friendly interface that is easy to navigate and optimized for various devices.

##### **Data-Driven Decision Making**

* + Enable data-driven decision making through robust analytics and reporting capabilities.

#### FUNCTIONAL REQUIREMENTS

##### **User Access Management**

* + **User Roles and Permissions:** Ability to create, assign, and manage user roles and permissions based on COMESA user access matrix.
	+ **User Authentication:** Secure user authentication mechanisms, including multi-factor authentication.

##### **Content Management**

* + **Document Sharing:** Features for uploading, sharing, and managing documents and project management.
	+ Allowing article feedback system
	+ **Version Control:** Track document versions and changes.
	+ **Search Functionality:** Advanced search capabilities to locate documents and information quickly, including a live AI search bar
	+ Translation-ready, allowing the creation of a multilingual knowledge base for a global audience supporting the COMESA official languages (Arabic, English & French)
	+ Incorporates the needs of help desks, wikis, blogs, chatbots, Virtual Assistants, and FAQs
	+ **Social networking:** Enable sharing of content via social networks.

##### **Collaboration Tools**

* + **Communities of Practice:** Interactive discussion forums and blogs for stakeholders to engage in dialogue.
	+ **Shared Workspaces:** Virtual workspaces for collaborative work on documents and projects.
	+ **Instant me**ss**aging**: To provide a collaborative and interactive environment for stakeholders to engage and share information in real time.

##### **Integration Capabilities**

* + **System Integration:** Seamless integration with existing systems such as the Monitoring & Evaluation System, E-Procurement System, Human Resource Management System, Document Management System, Planning and Budgeting System, and Donor Database.
	+ **API Support:** Support for API integration with future application systems.

##### **Data Migration**

* + **Migration Tools:** Tools for migrating existing data from the current systems to the new platform.
	+ **Data Quality Assurance:** Mechanisms to identify and resolve data quality issues during system migration.

##### **Analytics and Reporting**

* + **Custom Reports:** Ability to create and customize reports and dashboards.
	+ **Usage Analytics:** Track and analyze platform usage to gain insights and improve functionality.
	+ **Performance Metrics:** Monitor and report on key performance indicators (KPIs).

##### **Usability and Accessibility**

* + **Responsive Design:** Ensure the platform is responsive and accessible on various devices, including desktops, tablets, and smartphones.
	+ **User Interface:** Intuitive and user-friendly interface design.
	+ **Language Support:** Prevailing contents in all COMESA official languages.

##### **User Feedback Management**

Keep track of all user interactions with the platform via forms, chatbots and email (info@comesa.int) to ensure enquires are effectively and efficiently responded to. The platform must provide classification of categories of enquires and attach service levels with an escalation mechanism for all valid enquiries.

By meeting these business and functional requirements, the collaborative information sharing platform will effectively support COMESA's goals of enhancing communication, collaboration, and stakeholder engagement.

#### NON-FUNCTIONAL REQUIREMENTS

#### Performance Requirements

* **Performance Enhancement**: Enhance website loading speed and overall performance to reduce bounce rates and improve user satisfaction.
* **Response Accuracy:** The system should have accurate indexing for user requests.
* **Scalability:** The platform should handle a minimum of 10,000 concurrent users without performance degradation. The platform must be designed to accommodate future growth, including an increasing number of users, data volume, and potential integrations with other systems.
* **Throughput:** The system should support the processing of 100 transactions per second during peak times.

##### **Reliability Requirements**

* **Availability:** The platform should be designed to ensure 99.9% availability, excluding scheduled maintenance and include a disaster recovery plan for system redundancy and quick recovery from downtime.
* **Fault Tolerance:** The platform deployment architecture design should include redundancy to ensure continuity in the event of a fault. The system should recover from failures and maintain data integrity in the event of hardware or software failures.
* **Data Backup:** The platform should provide a data backup and restore mechanism for regular files and databases. The backup feature should be configurable as desired.

##### **Security Requirements**

* **Data Encryption:** All sensitive data should be encrypted both in transit and at rest using industry-standard encryption algorithms.
* **Access Control:** Implement role-based access control (RBAC) to ensure users only access information and functionalities relevant to their roles.
* **Audit Logging:** All user activities should be logged, and audit logs should be retained for a minimum of 1 year.
* **Incident Response:** A defined incident response plan should be in place to address and mitigate security breaches within 1 hour of detection.

##### **Usability Requirements**

* **User Interface:** The platform should have an intuitive and user-friendly interface that is easy to navigate.
* **Accessibility:** The platform should comply with Web Content Accessibility Guidelines (WCAG) AA standards to ensure accessibility for users with disabilities.
* **Localization:** Support for multiple languages to accommodate all COMESA official languages and automatically set the language preference based on the user's location.
* **Online Guides:** Comprehensive user guides, tutorials, and help resources should be available to users.

##### **Maintainability Requirements**

* **Documentation:** Detailed technical documentation, including system architecture, APIs, and user manuals, should be provided.
* **Code Quality:** Follow best practices for coding standards and perform regular code reviews to ensure high-quality code.
* **Automated Testing:** Implement automated testing for continuous integration/continuous deployment (CI/CD) to ensure reliability and quick detection of issues.

##### **Scalability Requirements**

* **Modularity:** The platform should be designed with modular architecture to facilitate easy updates and maintenance.
* **Flexibility**: The platform should be designed to accommodate new requirements.

##### **Compatibility Requirements**

* **Browser Compatibility:** The platform should be compatible with all major web browsers, including Chrome, Firefox, Safari, and Edge.
* **Device Compatibility:** The platform should be responsive and fully functional on desktops, tablets, and smartphones.
* **Integration Compatibility:** Ensure seamless integration with existing COMESA systems and future applications through well-documented APIs.

##### **Operational Requirements**

* **Deployment:** The platform should support both on-premises and cloud deployment options.
* **Monitoring:** Implement comprehensive monitoring tools to track system performance, security events, and user activities.
* **Support:** Provide technical support and a clear escalation process for resolving critical issues.

##### **Legal and Compliance Requirements**

* **Data Privacy:** Comply with relevant data protection regulations, including GDPR, to ensure user data privacy.
* **Compliance:** Ensure the platform adheres to COMESA policies and any applicable international standards.
* **Intellectual Property:** Ensure that all software components and libraries used are properly licensed and comply with intellectual property laws.

##### **Environmental Requirements**

* **Resource Efficiency:** Optimize the platform to minimize resource consumption, including CPU, memory, and bandwidth usage.
* **Sustainable Practices:** Encourage the use of sustainable IT practices and consider the environmental impact of data centres and infrastructure.

##### **Maintenance and Updates**

* + **Regular Updates:** Regular updates and patches to ensure the platform remains secure and functional.
	+ **Maintenance Plan:** Detailed maintenance plan post-warranty period, including SLA terms.

##### **Security and Compliance**

* + **Data Security:** Robust security measures to protect sensitive information.
	+ **Compliance:** Ensure compliance with relevant regulations and standards.
	+ **Audit Trails:** Maintain audit trails of all Create Read Update Delete (CRUD) activities on the platform.

##### **Training and Support**

* + **Training Programs:** Comprehensive training programs for business users and IT staff.
	+ **Knowledge Base:** Access to a knowledge base with tutorials, FAQs, and user guides.
	+ **Support Services:** Post-implementation support, including helpdesk services and on-site support.

##### **Perpetual License Requirement**

* The consultant must ensure that the collaborative information sharing platform is licensed to COMESA on a perpetual basis, with no additional fees required for usage, maintenance, support, or future updates. The platform license must grant COMESA full rights to the source code and all relevant intellectual property, enabling future modifications, expansions, or customisations without additional licensing costs. Any third-party components or dependencies required must also be licensed on a perpetual basis to avoid recurring costs.

By adhering to these non-functional requirements, the collaborative information sharing platform will be robust, secure, and user-friendly, effectively supporting COMESA’s goals and ensuring a high level of stakeholder satisfaction.

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# PROJECT DELIVERABLES

The following mandatory deliverables should be provided:

|  |  |  |
| --- | --- | --- |
| SN | Deliverable | Details |
| 1. | Project Management Plan & Project Documents | The project management plan shall cover the following aspects:* Project approach and organization
* User Requirements (URS), Systems Requirements Specifications (SRS) and System Design Document (SDD)
* Scope Management
* Schedule Management
* Deliverable Plan
* Configuration management
* Quality Management
* Risk Management
* Change management, communication, and training plan
* Go-Live Plan
* Warranty service plan

The supplier shall update the project plan at the end of each project phase. Furthermore, the supplier is expected to provide regular weekly progress reports or as specified by the COMESA project steering committee.  |
| 2. | Solution Blueprint | The blueprint solution shall cover all the functional, technical, migration and security requirements as well as the system architecture of the proposed solution. |
| 3. | Migration Strategy Document | The supplier shall submit a migration strategy document to migrate existing data from different sources to the information sharing platform. |
| 4. | Training | Administration training for technical staff. A comprehensive user manual and Administrator manual for each module configuration shall be delivered. |
| 5. | User Acceptance Test Document | The supplier should submit a Testing Strategy and Plan, which must include the UAT test scripts and ensure that all the UAT scenarios are catered for the requirements expressed by the users in the user requirements. The UAT exercise should consist of different rounds of testing. The supplier should ensure that full-fledged testing has been carried out before UAT. |
| 6. | A fully operational and bug free efficient system as per requirement | The supplier shall provide a fully operational and bug free system before Go-Live. The following will have to be addressed to the satisfaction of the users before Go-Live of the system:1. All requirements of the users (including IT Security requirements) should be catered for in the Application Software.
2. All identified scenarios should be fully and comprehensively tested during each round of UAT.
3. All bugs identified during UAT have been dealt with.
4. All documentation should be provided
 |
| 7. | Commissioning report  | The commissioning report shall include among others:* The level of customization for each module configured
* System setup document
* Security Policies

The sign-off shall be done at the end of the operational acceptance. |
| 8. | Warranty Plan | The bidder shall provide all the terms and condition of the warranty. |
| 9. | Support Agreement | The bidder shall provide all the terms and condition of the support. Furthermore, the bidder should provide a monthly progress report on maintenance & support activities and a periodic SLA performance report. |

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# MINIMUM REQUIREMENTS OF QUALIFICATIONS AND EXPERIENCES

The Consultancy Firm should have at least the following competencies and qualifications:

1. The Consulting firm should submit its profile, company registration and tax compliance certificates.
2. The Consultant should submit previous experiences of at least 5 years’ experience in developing and implementing similar information Sharing Platforms using the latest open technologies and web development frameworks (The document to be submitted shall include brief case studies, links to samples, and screenshots of similar projects undertaken; see Annex I).
3. The firm should have a strong project management ability to work against deadlines and technical and managerial capability and professional experience in implementing similar regional or with Multilateral Institutions.
4. To achieve the above-mentioned tasks and duties, the consulting firm shall have adequate and qualified experts with a demonstrated track record in developing high quality online learning; and prepare a clear work program, methodology and a corresponding manning schedule showing the timing of activities and the corresponding expertise input required for execution of the assignment (Follow the Format in Annex II and III).

The consultancy firm shall submit CVs of the project team that include at least a **Project Manager/Team Leader and 6** lead experts with the following minimum qualifications and experiences:

|  |  |  |
| --- | --- | --- |
| **Expert** | **Qualifications And Experience** | **Quantity** |
| **Project Manager/Team Leader:** | **Education**: At least a master's degree or equivalent in Management, Business Administration, ICT, or related fields. **Work Experience:** At least 10 years of experience on similar projects is mandatory, and experience in the COMESA region will be an added advantage.**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage.**Professional Qualifications**:Professional certifications in project management will be an added advantage |  1 |
| **Solution Architect:** | **Education**: The Solution Architect must have at least a Bachelor of Science degree in computer science/software development or a related field.**Work Experience**: She/He must have at least 5 years of proven experiences in System Design, Implementation and Testing, developing bespoke web applications, and Mobile App technologies using Open Technologies and frameworks.**Professional Qualifications**:Professional certifications in web development will be an added advantage.**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. | 1 |
| **Graphic Designer:** | **Education:** At least a degree in Audio-visual, multimedia development and graphics creation or related fields.**Work Experience**: The graphic designer should have at least 5 years of broad experience in the field of audio-visual development and Graphics creation and publication.**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. |  1 |
| **Web Developer/Programmer:**  | **Education:** The technical expert must have at least a Bachelor of Science degree in Computer Science, Information Technology, Software Engineering or a related field. **Work Experience**: He/she must have over 5 years’ experience working with web technologies and frameworks.**Professional Qualifications**:Professional certifications in web development will be an added advantage**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. |  1 |
| **Database Administrator/Developer:** | **Education**: The Expert must have at least a Bachelor of Science Degree in Computer Science, Information Technology, Software Engineering or a related field, with training certificates in database administration/development.**Work Experience**: She/He must have at least 5 years of proven experience in database administration/ development. The expert must have proficiency in working with Relational Database Management Systems such as MySQL, PostgreSQL, Oracle, Microsoft SQL Server etc.**Professional Qualifications**: Professional certifications in database administration/development will be an added advantage.**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. | 1 |
| **Content Manager:** | **Education**: The Expert must have at least a degree in Mass Communications, Journalism, Public Relations or a related field.**Work Experience**: She/He must have at least 5 years of proven experience in working with online platforms, including but not limited to managing content management systems and online writing.**Language skills**: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. | 1 |
| **Security Specialist/Quality Assurance Tester:** | Education: The Specialist/Tester must have at least a degree in Cybersecurity, Information Technology, Computer Science, or a related field. Relevant certifications such as CISSP (Certified Information Systems Security Professional), CEH (Certified Ethical Hacker), or CompTIA Security+ will be an added advantage. Work Experience: She/He must have at least 5 years of proven experience in web security, including implementing security protocols, performing vulnerability assessments, and managing web security systems. Experience with secure coding practices is essential, and knowledge of web application security (OWASP) is required. OR She/He must have at least 3 years of proven experience in quality assurance, testing software applications, and working with testing tools and methodologies. Language Skills: English proficiency is mandatory for the task. Proficiency in Arabic and/or French will be an added advantage. | 1 |

The Contractor shall be solely responsible for employing staff or retaining the services of any staff/Experts and under the applicable laws, including compliance with immigration and visa laws, obtaining and maintaining work permits, health or accident insurance, social security, unemployment insurance and other contributions or benefits as may be required under applicable laws.

The Contractor shall be solely responsible for its employees, consultants’ acts and omissions, including their compliance with, and their breaches of, the terms of the Contract. For this effect, the Contractor shall submit a proof of Expert's commitment to the assignment and terms and conditions.

#

# EVALUATION CRITERIA

The Evaluation will be conducted based on the financial and technical proposals submitted by the applicant against the evaluation criteria set out by COMESA Procurement Rules and Procedures. The Financial Proposal must provide a detailed cost breakdown and separate figures for each functional grouping or category. The prices/rates quoted must be exclusive of all taxes since COMESA is exempt from taxes as stipulated in the COMESA treaty and regulations.

The Technical Proposal will be evaluated against the following criteria.

|  |  |
| --- | --- |
| **Criteria**  | **Maximum points allocated** |
| **Competency of the Consultancy Firm** | ***[50 points]*** |
| 1. Overall responses and quality of the proposal presentation and attachments submitted by the Firm against the TORs (The firm should provide a compliance sheet to ensure that business, functional and non-functional requirements are met)
 | ***[30 points]*** |
| 1. Proven experience of the firm in at least 5 years’ experience in developing and implementing a similar project, namely - Information Sharing platforms. (Attach copies of contracts and client testimonials as evidence)
 | ***[10 points]*** |
| 1. Proposed project implementation methodology, approach and technology used, and quality of the project work plan with breakdown tasks and staffing arrangements; monitoring and quality assurance process
 | ***[10 points]*** |
| ***Qualification of Experts*** | ***[50 Points]*** |
| 1 | Key Expert 1 *[Project Manager/Team Leader]* | *[15 points]* |
| 2 | Key Expert 2 (Solution Architect) | *[10 points]* |
| 3 | Key Expert 3 (Graphic Designer) | *[5 points]* |
| 4 | Key Expert 4 (Web Developer/Programmer) | *[5 points]* |
| 5 | Key Expert 5 (Database Administrator/Developer) | *[5 points]* |
| 6 | Key Expert 6 (Content Manager) | *[5 points]* |
| 7 | Key Expert 7 (Security Specialist/Quality Assurance Tester) | *[5 points]* |
| **Total**  | **100 points** |

The number of points to be given under each evaluation sub-criteria for qualifications of Experts are:

|  |  |
| --- | --- |
| **Sub-criteria**  | **Percentage of Total Number of Points Allocated to the Criteria** |
| (i) General Qualifications: Education and Professional Certifications |  ***30%*** |
| (ii) Work experience and adequacy for the Project |  ***60%*** |
| (iii) Language skills and experience in the region | ***10%*** |
| **Total**  | **100** |

#

# OTHER REQUIREMENTS

## Payment Terms

The structure of payment shall be as follows:

**Implementation Services**

|  |  |  |
| --- | --- | --- |
| S.N | Deliverable | Payment |
| 1 | Project Implementation Plan with agreed project implementation plan | 10% |
| 2 | Solution Blueprint | 20% |
| 3 | User Acceptance Testing and Training | 30% |
| 4 | Go-live | 30% |
| 5 | Retention Money - 12 months after Go-Live | 10% |

**Support Services**

|  |  |  |
| --- | --- | --- |
| S.N | Deliverable | Payment |
| 1 | 12 Months post-go-live Warranty | 0% |
| 2 | Annual Support and Maintenance Contract (The firms shall provide the cost for three years in their financial proposal) | Annually |

##

## Project Approach, Methodology & Governance

The consultant is expected to describe how the firm intends to manage all aspects of the work to be performed, including schedules for the completion of tasks/subtasks and procedures for scheduling and cost control.

###

### **Project Timeline**

Based upon the proposed project approach and work plan, provide a Project Gantt chart detailing the project schedule, phase, task and subtask duration, proposed phasing for roll-out of proposed system and highlight key milestone dates that illustrate the duration of tasks listed in the scope of work and identify results and deliverable milestones.

###

### **Company Profile and Profile of Consultants**

A company profile as well as a list of staff that would be involved in the project and their respective qualifications and experience should be provided.

In this respect, Bidders are required to submit information on reference sites and staff profiles as per the format at Annex I and Annex II.

COMESA shall be notified in writing of any change or replacement of staff being assigned to the project as per their response to the bidding document. The respective qualifications and experience of any new staff joining the implementation team should be provided. COMESA reserves the right to approve any such change.

###

### **Customer References**

To be eligible for this exercise, bidders should have at least three (3) reference sites where they have successfully implemented a similar project (Annex I).

#

# Annex I: Reference Sites

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| SN | Reference Site | Description of Assignment in Detail | Contract Value | Reference Site Link | Project Start Date | Project End Date | Client Contact (Name/Email) |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |

# Annex II: Staff Assignment

|  |
| --- |
| Table 1: Work Assignment Description  |
| SN | Name of Expert | Designation | Manpower Input in Months |
| Remote | On-Site | Total |
| 1 |  | Project Manager | 2 | 4 | 6 |
| 2 |  | Solution Architect | 0 | 6 | 6 |
| 3 |  | Graphic Designer | 2 | 4 | 6 |
| 4 |  | Web Developer/Programmer | 0 | 6 | 6 |
| 5 |  | Database Administrator/Developer | 2 | 4 | 6 |
| 6 |  | Content Manager | 0 | 6 | 6 |
| 7 |  | Security Specialist/Quality Assurance Tester | 2 | 4 | 6 |

#

# Annex III: Staff Profile

|  |
| --- |
| Curriculum Vitae: Expert 1 |
| Role in the Project | Role X |
| Name of Expert | Expert 1 |
| Date of Birth | dd/mm/yyyy |
| Nationality | XXXX |
| Education |
| No. | Degree | College | Year |
| 1 | Bachelor of Science XXX  | College Name | yyyy |
| 2 | Master of Science XXX | College Name | yyyy |
| Professional Certifications |
| No. | Certification  | Body and Number | Status |
| 1 | Certified XXX | Body X Certificate # | Active |
| 2 | Certified XXX | Body X Certificate # | Expired |
| Expert Profile Summary |
| Work Experience |
| No | Employer name | From | To | Designation |
| 1 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| 2 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| 3 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| Project Experience Related to Current Assignment |
| Project Client | Client Name |
| Project Summary |
| Responsibilities in the project |
| Technologies Used | Technology 1, Technology 2, Technology N |
| Sign | Expert Signature | Date | dd/mm/yyyy |

**Proposal**

The consultant will submit a detailed proposal outlining the costs associated with conducting the assignment, including fees, travel expenses, and any other relevant expenditures.

The proposals must be submitted with a cover letter containing confirmation that you have understood the Terms of Reference for the assignment.

**ANNEX 2: Technical Proposal Submission Proposal Forms**

[*Comments in brackets* [ ] *provide guidance to the Service Providers for the preparation of their Technical Proposals; they should not appear on the Technical Proposals to be submitted.*]

CONTENTS

[Form TECH-1 Technical Proposal Submission Form 7](#_Toc267380180)

[Form TECH- 2 Comments and Suggestions on the Terms of Reference , on Counterpart Staff and Facilities to be Provided by the COMESA and on Draft Contract 8](#_Toc267380181)

[Form TECH-3 Description of Approach, Methodology and Work Plan for Performing the Assignment 9](#_Toc267380182)

[Form TECH-4 Team Composition and Task Assignments 10](#_Toc267380183)

[Form TECH – 5 Curriculum Vitae (CV) for Proposed Professional Staff 11](#_Toc267380184)

[Form TECH-6 Staffing Schedule 12](#_Toc267380185)

[Form TECH-7 Work Schedule 13](#_Toc267380187)

###

### **FORM TECH-1: Technical Proposal Submission Form**

[*Location, Date*]

To:

**COMESA SECRETARIAT**

**BEN BELLA ROAD**

**P.O BOX 30051**

**LUSAKA, ZAMBIA**

**Tel: 260 211 229725 – 32**

Dear Sirs,

 We, the undersigned, offer to provide the consulting services for [*insert title of assignment*] in accordance with your Request for Services number *[insert the number],* dated [*insert date*] and our Proposal. We are hereby submitting our Proposal, which includes this Technical Proposal, and a Financial Proposal.

 We are submitting our Proposal in association with: [*insert a list with full name and address of each partner*]1

We hereby declare that all the information and statements made in this Proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.

 Our Proposal is binding upon us for the period indicated in the Paragraph 8(iii) of the Request for Services.

 We undertake, if our Proposal is accepted, to initiate the consulting services related to the assignment not later than the date indicated in Paragraph 9 of the Request for Services.

 We understand you are not bound to accept any Proposal you receive.

 We remain,

Yours sincerely,

Authorized Signature [*In full and initials*]:

Name and Title of Signatory:

Name of Firm:

Address:

1 [*Delete in case no Joint Venture or Consortium is foreseen.*]

###

### **FORM TECH- 2: COMMENTS AND SUGGESTIONS ON THE TERMS OF REFERENCE, ON COUNTERPART STAFF AND FACILITIES TO BE PROVIDED BY COMESA AND ON STANDARD TERMS OF CONTRACT**

#### A - On the Terms of Reference

[*Present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities). Such suggestions should be concise and to the point and incorporated in your Proposal.*]

#### B - On Counterpart Staff and Facilities

[*Comment here on counterpart staff and facilities to be provided by COMESA as indicated in the TORs or include your own requirements of: administrative support, office space, local transportation, equipment, data, etc.*]

**C - On Standard Terms of Contract**

*[Please recommend any change in the standard Terms of Contract clauses you would like to see incorporated in the final Contract. Please indicate which of the proposed changes, if not accepted by COMESA could determine you to reject the Contract for this project. Use maximum 2 pages]*

**FORM TECH-3: DESCRIPTION OF APPROACH, METHODOLOGY AND WORK PLAN FOR PERFORMING THE ASSIGNMENT**

* + 1. Technical approach, methodology and work plan are key components of the Technical Proposal. You are required to present your Technical Proposal divided into the following three chapters:
1. *Technical Approach and Methodology;*
2. *Work Plan; and*
3. *Organization and Staffing.*
	* + 1. Technical Approach and Methodology. In this chapter you should explain your understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance, and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

*b) Work Plan. In this chapter you should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by COMESA), and delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan. A list of the final documents, including reports, drawings, and tables to be delivered as final output, should be included here. The work plan should be consistent with the Work Schedule of Form TECH-7.*

*c) Organization and Staffing. In this chapter you should propose the structure and composition of your team. You should list the main disciplines of the assignment, the key expert responsible, and proposed technical and support staff.*]

### **Form TECH-4: Team Composition and Task Assignments**

|  |
| --- |
| Professional Staff |
| Name of Staff | Area of Expertise | Position Assigned | Task Assigned |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |

### **Form TECH – 5: Curriculum Vitae (CV) for Proposed Professional Staff**[[1]](#footnote-2)

|  |  |
| --- | --- |
| 1. **Family name:**
 | *[insert the name]* |
| 1. **First names:**
 | *[insert the names in full]* |
| 1. **Sex**
 | *[ ]* |
| 1. **Date of birth:**
 | *[insert the date]* |
| 1. **Nationality:**
 | *[insert the country or countries of citizenship]* |
| 1. **Contact Details:**
 | ***Address****: [insert the physical address]* |
|  | ***Phone:*** *[insert the phone and mobile no.]* |
|  | ***E-mail:*** *[insert the email]* |
| 1. **Education:**
 |  |
|  |  |
| **Institution:****[Date from – Date to]** | **Degree(s) or Diploma(s) obtained:** |
| *[indicate the month and the year]* | *[insert the name of the diploma and the specialty/major]* |
| *[indicate the month and the year]* | *[insert the name of the diploma and the specialty/major]* |

**7. Language Proficiency:** (Indicate competence on a scale of 1 to 5) (1 – excellent; 5 – basic)

|  |  |  |  |
| --- | --- | --- | --- |
| **Language** | **Reading** | **Speaking** | **Writing** |
| *[insert the language]* | *[insert the no.]* | *[insert the no.]* | *[insert the no.]* |
| *[insert the language]* | *[insert the no.]* | *[insert the no.]* | *[insert the no.]* |
| *[insert the language]* | *[insert the no.]* | *[insert the no.]* | *[insert the no.]* |

|  |  |
| --- | --- |
| **8. Membership of Professional Bodies:**  | *[indicate the name of the professional body]* |
| **9. Other Skills:** | *[insert the skills]* |
| **10. Present Position:** | *[insert the name]* |
| **11. Years of Experience:** | *[insert the no]* |
| **12. Key Qualifications:** (Relevant to the assignment)*[insert the key qualifications]* |

**13. Specific Experience in the Region:**

|  |  |
| --- | --- |
| **Country** | **Date from - Date to** |
| *[insert the country]* | *[indicate the month and the year]* |
| *[insert the country]* | *[indicate the month and the year]* |
| *[insert the country]* | *[indicate the month and the year]* |

1. **Professional Experience[[2]](#footnote-3):**

| **Date from – Date to** | **Location of the Assignment** | **Company& Reference Person (Name & Contact Details)** | **Position** | **Description** |
| --- | --- | --- | --- | --- |
| *[indicate the month and the year]* | *[indicate the country and the city]* | ***Name of the Company:******Address of the company:******Phone:******Fax:******Email:*** ***Name and title of the reference person from the company:*** | *[indicate the exact name and title and if it was a short term or a long term position]* | ***Title of the Assignment******Beneficiary of the Assignment******Brief description of the Assignment:*** ***Responsibilities:*** |
| *[indicate the month and the year]* | *[indicate the country and the city]* | ***Name of the Company:******Address of the company:******Phone:******Fax:******Email:*** ***Name and title of the reference person from the company:*** | *[indicate the exact name and title and if it was a short term or a long term position]* | ***Title of the Assignment******Beneficiary of the Assignment******Brief description of the Assignment:*** ***Responsibilities:*** |
| *[indicate the month and the year]* | *[indicate the country and the city]* | ***Name of the Company:******Address of the company:******Phone:******Fax:******Email:*** ***Name and title of the reference person from the company:*** | *[indicate the exact name and title and if it was a short term or a long term position]* | ***Title of the Assignment******Beneficiary of the Assignment******Brief description of the Assignment:*** ***Responsibilities:*** |
|  |  |  |  |  |
| *[indicate the month and the year]* | *[indicate the country and the city]* | ***Name of the Company:******Address of the company:******Phone:******Fax:******Email:*** ***Name and title of the reference person from the company:*** | *[indicate the exact name and title and if it was a short term or a long-term position]* | ***Title of the Assignment******Beneficiary of the Assignment******Brief description of the Assignment:*** ***Responsibilities:*** |

1. **Other relevant information:** (e.g., Publications)

***[insert the details]***

1. ***Statement:***

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any willful misstatement described herein may lead to my disqualification or dismissal, if engaged.

I hereby declare that at any point in time, at the COMESA Secretariat request, I will provide certified copies of all documents to prove that I have the qualifications and the professional experience and indicated at points 8 and 14 above**[[3]](#footnote-4),** documents which are attached to this CV as photocopies.

By signing this statement, I also authorised the COMESA Secretariat to contact my previous or current employers indicated at point 14 above, to obtain directly reference about my professional conduct and achievements.

|  |  |  |
| --- | --- | --- |
|  | Date: |  |

**ATTACHMENTS:** ***1) Proof of qualifications indicated at point No. 8***
 ***2) Proof of working experience indicated at point No. 14***

### **Form TECH-6: Staffing Schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| N° | **Name of Staff[[4]](#footnote-5)** | **Staff Input (in the form of a bar chart)[[5]](#footnote-6)** | **Total staff-month/weeks input[[6]](#footnote-7)** |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **n** | **Home** | **Field[[7]](#footnote-8)** | **Total** |
| **Key Experts**  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1 |  | [Home] |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| [Field] |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |  | **Subtotal** |  |  |  |
| **Non key experts**  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 1 |  | [Home] |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| [Field] |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |  | **Subtotal** |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  | **Total** |  |  |  |

 Full time input

 Part time input

### **Form TECH-7: Work Schedule**

|  |  |  |
| --- | --- | --- |
| **N°** | **Activity[[8]](#footnote-9)** | **Months[[9]](#footnote-10)** |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **n** |
| 1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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**ANNEX 3: Financial Proposal Submission Forms**

[*Comments in brackets* [ ] *provide guidance to the Service Providers for the preparation of their Financial Proposals; they should not appear on the Financial Proposals to be submitted.*]

[Form FIN-1 Financial Proposal Submission Form 15](#_Toc267380419)

[Form FIN-2 Summary of Costs 16](#_Toc267380420)

[Form FIN-3 Breakdown of Remuneration1 17](#_Toc267380421)

[Form FIN-4 Breakdown of Reimbursable Expenses 18](#_Toc267380422)

## FORM FIN-1 FINANCIAL Proposal Submission Form

[*Location, Date*]

To: [*Name and address of Procuring Entity*]

Dear Sirs,

 We, the undersigned, offer to provide the consulting services for [*Insert* *title of assignment*] in accordance with your Request for Services number *[insert the number],* dated [*insert date*] and our Technical Proposal. Our attached Financial Proposal is for the sum of [*Insert amount(s) in words and figures*1[[10]](#footnote-11)]. This amount inclusive of all expenses deemed necessary by us for the performance of the Contract in accordance with the Terms of Reference requirements and our Technical Proposal and *[“does” or “does not” delete as applicable]* includeany of the following taxes in Zambia: value added tax and social charges or/and income taxes on non-resident Personnel’s fees and benefits.

Our Financial Proposal shall be binding upon us, subject to the modifications resulting from computation errors or other priced deviations identified during evaluation, up to expiration of the validity period of the Proposal, i.e., before the date indicated in Paragraph Reference 8 (iii) of the Request for Services.

 We understand you are not bound to accept any Proposal you receive.

 We remain,

Yours sincerely,

Authorized Signature [*In full and initials*]:

Name and Title of Signatory:

Name of Firm:

Address:

## FORM FIN-2: SUMMARY of Costs

|  |  |
| --- | --- |
| Cost component | **Costs** |
| **(US$)** |
| Remuneration |  |
| Reimbursable Expenses |  |
| Taxes**[[11]](#footnote-12)**[[12]](#footnote-13) |  |
| Total  |  |

## Form FIN-3 BREAKDOWN of Remuneration[[13]](#footnote-14)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name[[14]](#footnote-15)** | **Position[[15]](#footnote-16)** | **Input** **(in staff days)** | **Staff-daily Rate[[16]](#footnote-17)****(in US$)** | **Total** **(in US$)** |
| **Key experts** |  |  |  |  |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| Etc. |  | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| **Non-Key staff** |  |  |  |  |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| *[name]* | *[position in the contract]* | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| Etc. |  | [*Home*] *[number]* | [*Home*] *[amount]* | [*Home*] *[amount]* |
| [*Field*] *[number]* | [*Field*] *[amount]* | [*Field*] *[amount]* |
| **TOTAL RENUMERATION** |  |

## Form FIN-4: Breakdown of Reimbursable Expenses

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **N°** | **Description[[17]](#footnote-18)** | **Unit[[18]](#footnote-19)** | **No. of Units** | **Unit Cost****(in US$)** | **Total****(in US$)** |
| 1 | Per Diem Allowances | Day |  |  |  |
| 2 | Flights[[19]](#footnote-20) | Trip |  |  |  |
| 3 | Miscellaneous Travel Expenses[[20]](#footnote-21) | Trip |  |  |  |
| 4 | Communication Costs  | Lump sum  |  |  |  |
| 5 | Drafting and Reproduction of Reports |  |  |  |  |
| 6 | Equipment, Instruments, Materials, Supplies, etc. (if needed) |  |  |  |  |
| 7 | Local Transportation Costs |  |  |  |  |
| 8 | Office Rent |  |  |  |  |
| 9 | Insurances Cost, Out of which: | Lump sum |  |  |  |
|  | i) | Life Insurance (including repatriation) | Lump sum |  |  |  |
|  | ii) | Heath Insurance  | Lump sum |  |  |  |
|  | iii) | Third Party Liability Insurance | Lump sum |  |  |  |
|  | iv) | Professional Liability Insurance | Lump sum |  |  |  |
| 10 | Other**4** |  |  |  |  |
| 11 | **Fixed Reimbursable Expenses[[21]](#footnote-22)** |  |  |  |  |
| **TOTAL REIMBUSABLES EXPENSES** |  |

**ANNEX 3: Standard Terms and Conditions**

**STANDARD CONTRACT FOR CONSULTING SERVICES**

THIS Contract is entered into between,

 *[name of Procuring Entity]* (hereinafter called the “Procuring Entity”), on the one hand and;

 *[name of Service Provider]* (hereinafter called the “Service Provider”) of the other part;

**WHEREAS** COMESA wishes to have the Contractor perform the services hereinafter referred to, and

**WHEREAS** the Contractor is willing to perform these services,

**NOW THEREFORE THE PARTIES** hereby agree as follows:

|  |  |
| --- | --- |
| **1. Services** | (a) The Contractor shall perform the services specified in Annex A, “Terms of Reference and Technical Proposal,” which is made an integral part of this contract (“the Services”).(b) The Contractor shall provide the personnel listed in Annex B, “Service Provider’s Personnel,” to perform the Services.(c) The Contractor shall submit to COMESA the reports in the form and within the time periods specified in Annex C, “Service Provider’s Reporting Obligations.” |
| **2. Term** | The Contractor shall perform the Services during the period commencing ***[insert the date]*** and continuing ***[insert the date]*** or any other period as may be subsequently agreed by the parties in writing. |
| **3. Termination**  |  |
| **3.1 By COMESA**  | COMESA may terminate this contract in case of the occurrence of any of the events specified in paragraphs (a) through (g) of this Clause 3.1. In case of an occurrence specified in (a) to (g) COMESA shall give not less than seven (7) days’ written notice of termination to the Service Provider(a) If the Contractor fails to remedy a failure in the performance of its obligations hereunder, within seven (7) days of period after the receipt of a registered mail with acknowledgment of receipt specifying the failure.(b) If the Contractor becomes (or, if the Contractor consists of more than one entity, if any of its members becomes) insolvent or bankrupt or enter into any agreements with their creditors for relief of debt or take advantage of any law for the benefit of debtors or go into liquidation or receivership whether compulsory or voluntary.(c) If the Contractor fails to comply with any final decision reached as a result of arbitration proceedings pursuant to Clause 15 hereof.(d) If the Service Provider, has engaged in corrupt or fraudulent practices in competing for or in executing this Contract.(e) If the Contractor submits to COMESA a false statement which has a material effect on the rights, obligations or interests of COMESA.(f) If, as the result of Force Majeure, the Contractor is unable to perform a material portion of the Services for a period of not less than fourteen (14) days.(g) If COMESA, in its sole discretion and for any reason whatsoever, decides to terminate this Contract.Early termination shall not prejudice or affect the accrued rights or liabilities of the Parties.  |
| **3.2 By the Service Provider** | The Contractor may terminate this contract, by not less than seven (7) days’ written notice to COMESA, in case of the occurrence of any of the events specified in paragraphs (a) through (d) of this Clause 3.2.(a) If COMESA fails to pay any money due to the Contractor pursuant to this contract (which is not subject to dispute pursuant to Clause 15 hereof) within seven (7) days after receiving written notice from the Contractor that such payment is overdue.(b) If, as the result of Force Majeure, the Contractor is unable to perform a material portion of the Services for a period of not less than fourteen (14) days.(c) If COMESA fails to comply with any final decision reached as a result of arbitration pursuant to Clause 15 hereof.(d) If COMESA is in material breach of its obligations pursuant to this Contract and has not remedied the same within thirty (30) days (or such longer period as the Contractor may have subsequently approved in writing) following the receipt by COMESA of the Service Provider’s notice specifying such breach.Early termination shall not prejudice or affect the accrued rights or liabilities of the Parties.  |
| **4. Payment** | A. Ceiling For Services rendered pursuant to Annex A, COMESA shall pay the Contractor an amount not to exceed ***US$*** ***[insert the amount in figures and letters]***. This amount has been established based on the understanding that it includes all of the Service Provider's costs and profits as well as any tax obligation that may be imposed on the Service Provider.B. Schedule of Payments The schedule of payments is specified below:[[22]](#footnote-23)1 maximum 20% of the contract value upon COMESA's receipt and acceptance of the inception report signed by the Contractor.50%upon COMESA’s receipt of the draft final report*,* acceptable to COMESA; ***and***maximum 30% of the contract value upon COMESA’s receipt and acceptance by COMESA of the final report.**Total: 100%**C. AcceptanceThe Deliverables, meaning Reports or Services submitted to an Acceptance (either formal or not), are listed in the Annex C thereof.Acceptance means express or tacit acknowledgment that the Deliverables comply with the Contract.The following principles are always applicable:1. Unless COMESA makes reservations within fourteen (14) working days from the submission, the Deliverables are deemed accepted;
2. In case of reservations by COMESA during the Acceptance Period, the Deliverables are deemed accepted once the reservations are withdrawn;
3. It is expressly agreed that the use of any Deliverables or any phase of the Contract means the final Acceptance of the phase or the corresponding Deliverables; and
4. The Acceptance is definitive and cannot be doubt for any reason whatsoever.

D. Payment Conditions Payment shall be made in **US$** no later than 30 days following submission by the Contractor of an acceptable invoice accompanied by prove of Acceptance (implicit or explicit) of Deliverables associated to the invoice, in duplicate, to the coordinator designated in paragraph 4.* + 1. If the Contractor does not receive payment by the time stated then the Contractor shall be paid interest at the overdraft interest rate the Contractor is charged by its bank calculated from the due date of payment.
 |
| **5. Payment upon Termination** | Upon termination of this Contract pursuant to Clauses 3.1 or 3.2 hereof, COMESA shall make the following payments to the Service Provider:(a) The cost of all accepted Deliverables performed prior to the effective date of termination and any interest rate due to the Contractor as a result of previous delays in payment of invoices; and(b) Except in the case of termination pursuant to paragraphs (a) through (e) of Clause 3.1 hereof, reimbursement of any reasonable out-of-pocket demobilization or other direct costs incidental to the prompt and orderly termination of this Contract, including the cost of the return travel of the Service Provider’s Personnel. |
| **6. Project Administration** | A. Coordinator COMESA designates the ***[insert de full name, the title, department and organization****]****,*** as Procuring Entity's Coordinator; the coordinator will be responsible for the coordination of activities under this Contract, for acceptance and approval of the reports and of other deliverables by COMESA and for receiving and approving invoices for the payment.B. Reports  The reports listed in Annex C, “Service Provider's Reporting Obligations,” shall be submitted in the course of the assignment and will constitute the basis for the payments to be made under Clause 4 thereof.1. Information

COMESA shall timely provide to the Service Provider, free of cost, all information that may be reasonably required for the provision of the Services. The Contractor shall be entitled to rely on the accuracy and completeness of such information furnished by or on behalf of COMESA.D. DecisionsCOMESA shall give his decision on all matters properly referred to him in writing by the Contractor within a reasonable time so as not to delay the Services.Where there is a misunderstanding between COMESA’s Coordinator and the Service Provider, the Contractor can bring the issue into the attention of the SADC Secretariat Executive Secretary, which is entitled to express COMESA’s final decision on the issue brought into attention.E. Assistance COMESA shall co-operate with the Contractor and shall not interfere with or obstruct the proper performance of the Services. COMESA shall as soon as practicable:(a) Provide the Service Provider’s personnel with work permits and such other documents as shall be necessary to enable them to perform the Services;(b) Arrange for the Service Provider’s personnel and, if appropriate, their eligible dependents to be provided promptly with all necessary entry and exit visas, residence permits, exchange permits and any other documents required for their stay in the Government’s country;(c) Facilitate prompt clearance through customs of any property required for the Services and of the personal effects of the Service Provider’s personnel and their eligible dependents;(d) Issue to officials, agents and representatives of the Government all such instructions as may be necessary or appropriate for the prompt and effective implementation of the Services;(e) Exempt the Contractor and its personnel from any requirement to register or obtain any permit to practice their profession or to establish themselves either individually or as a corporate entity according to the Applicable Law;(f) Grant to the Contractor and its personnel of either of them the privilege, pursuant to the Applicable Law, of bringing into the Government’s country reasonable amounts of foreign currency for the purposes of the Services or for the personal use of the personnel and their dependents and of withdrawing any such amounts as may be earned therein by the personnel in the execution of the Services; (g) Authorize the Contractor and its personnel to act as his agent as may be necessary for the performance of the Services;(h) Procure the Service Provider’s ready access to the necessary sites; and(i) Designate in writing a person to act with his complete authority to give instructions for and to receive information on his behalf. |
| **7. Performance Standards** | The Contractor undertakes to perform the Services with the highest standards of professional and ethical competence and integrity. The Contractor shall promptly replace any employees assigned under this Contract that COMESA considers unsatisfactory as a result of their incompetence to render the Services or their misconduct. |
| **8. Confidentiality** | (a) The Service Providers shall not, during the term of this Contract and within two (2) years after its expiration, disclose any proprietary or confidential information relating to the Services, this Contract or COMESA's business or operations without the prior written consent of COMESA.(b) Where necessary, the parties may enter into a non-disclosure agreement that shall form an integral part of this contract. |
| **9. Ownership of Material** | Any studies reports or other material, graphic, software or otherwise, prepared by the Contractor for COMESA under the Contract shall belong to and remain the property of COMESA. The Contractor may retain a copy of such documents and software but shall refrain from using it without the prior written consent of COMESA.  |
| **10. Contractor Not to be Engaged in Certain Activities** | The Contractor agrees that, during the term of this Contract and after its termination, the Contractor and any entity affiliated with the Service Provider, shall be disqualified from providing goods, works or services (other than the Services and any continuation thereof) for any project resulting from or closely related to the Services. |
| **11. Insurance** | The Contractor will be responsible for taking out any appropriate insurance coverage, in the limit indicated in the Clause 14 hereof. |
| **12. Amendments**  | Any modification of the Terms and Condition of the Contract shall be through a written Amendment signed by both parties. The procedures for modification of the Contract shall observe the SADC Secretariat principles of modifying contracts as lay down in the SADC Secretariat Procurement Guidelines edition *[insert the edition].* Only the addition or the replacement of key experts shall be considered a modification of the Contract. In case of replacement of a key expert, this shall be done only with an expert having equal or better qualification than the expert replaced. The Contractor shall not assign this Contract or sub-Contract any portion of it without COMESA's prior written consent. |
| **13. Law Governing Contract and Language** | The Contract shall be governed by UNIDROIT Principles of International Commercial Contracts (2011) as developed by the International Institute for the Unification of Private Law and the language of the Contract shall be **English**.  |
| **14. Liability** | Limitation of the Service Providers’ Liability towards COMESA: (a) Except in case of gross negligence or wilful misconduct on the part of the Contractor or on the part of any person or firm acting on behalf of the Contractor in carrying out the Services, the Service Provider, with respect to damage caused by the Contractor to COMESA ’s property, shall not be liable to COMESA: (i) For any indirect or consequential loss or damage; (ii) For any direct loss or damage that exceeds by two times *the* value of the fees of this Contract (reimbursable expenses will not be taken into consideration for determining the value of Service Provider’s liability); and(iii) For loss or damage caused as a result of any Force Majeure Event.1. This limitation of liability shall not affect the Service Providers’ liability, if any, for damage to Third Parties caused by the Contractor or any person or firm acting on behalf of the Service Providers in carrying out the Services.

Any action by either party must be brought within one (1) year after the cause of action arose. |
| **15. Dispute Resolution** | 1. Any dispute arising from, or in connection with the interpretation or operation of this Contract shall be resolved amicably by both parties through a process of negotiation.
2. Where the Parties fail to reach an amicable solution within a period of 30 (thirty) day period, or such longer period as they may agree, the parties have failed to resolve their dispute or differences by any mutual consultation, either party may submit the dispute before the COMESA Court of Justice for arbitration upon written notice to that effect (a “Notice of Arbitration”) and the dispute shall finally be determined in accordance with the Arbitration Rules of the COMESA Court of Justice as amended from time to time
3. Each party agrees that any decision or award in any arbitration made by the COMESA Court of Justice shall be final and binding and shall not be subject to appeal to any court of law.
 |

**Annexes:**

**Annex A:** Terms of Reference and Technical Proposal

**Annex B:** Service Provider’s Personnel

**Annex C:** Service Provider’s Reporting Obligations

**IN WITNESS WHEREOF**, the Parties’ representatives, being so duly authorized, have caused this Contract to be signed in four originals in the English language in their respective names as of the day and year first below written:

Signed today ***[insert the date]***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **For COMESA** | **Signature** |  | **For the Contractor** | **Signature** |
| **Name:** *[insert full name]* |  |  | **Name:** *[insert full name]* |  |
| **Title:** *[insert the title]* |  |  | **Title:** *[insert the title]* |  |
| **Place:** *[insert the city and country]* |  |  | **Place:** *[insert the city and country]* |  |
| **Date:** *[insert the date]* |  |  | **Date:** *[insert the date]* |  |

1. **The CV must not exceed eight (8) pages**  [↑](#footnote-ref-2)
2. **Only key information about the positions and the responsibilities held in various assignments during the last ten (10) years should be included. Experience older than 10 years will be rendered irrelevant.**  [↑](#footnote-ref-3)
3. ***The proof of stated qualifications shall be in the form of the copies of the degrees and diploma obtained, while for the professional experience the proof shall be either acknowledgement letters from the previous employers or copies of the contract signed with them.***  [↑](#footnote-ref-4)
4. Position held in the Assignment must be indicated as well. [↑](#footnote-ref-5)
5. Months/ weeks are counted from the start of the assignment. For each staff indicate separately staff input for home and field work. [↑](#footnote-ref-6)
6. Select months or weeks as needed. [↑](#footnote-ref-7)
7. Field work means work carried out at a place other than the Service Provider home office. [↑](#footnote-ref-8)
8. Indicate all main activities of the assignment, including delivery of reports (e.g.: inception, interim, and final reports), and other benchmarks such as Purchaser’s approvals. For phased assignments indicate activities, delivery of reports, and benchmarks separately for each phase. [↑](#footnote-ref-9)
9. Duration of activities shall be indicated in the form of a bar chart [↑](#footnote-ref-10)
10. Amounts must coincide with the ones indicated under Total Cost of Financial proposal in Form FIN-2. [↑](#footnote-ref-11)
11. If requested in the RFP clause 8 (i) ***[delete if not applicable]*** [↑](#footnote-ref-12)
12. Please provide details on taxes applied, the legal ground for application of the taxes and how they have been calculated [↑](#footnote-ref-13)
13. Form FIN-3 shall be filled in for the same Professional and Support Staff listed in Form TECH-6. [↑](#footnote-ref-14)
14. Professional Staff should be indicated individually; Support Staff should be indicated per category (e.g.: draftsmen, clerical staff). [↑](#footnote-ref-15)
15. Positions of the Professional Staff shall coincide with the ones indicated in Form TECH-4. [↑](#footnote-ref-16)
16. Indicate separately staff-daily rate for home and field work. [↑](#footnote-ref-17)
17. Delete items that are not applicable or add other items as the case may be. [↑](#footnote-ref-18)
18. Indicate unit cost. [↑](#footnote-ref-19)
19. Indicate route of each flight, and if the trip is one- or two-ways. [↑](#footnote-ref-20)
20. Provide clear description of what is their exact nature [↑](#footnote-ref-21)
21. The amount has to be indicated by COMESA and shall be included, without modifications, in the Financial Proposal. It shall cover costs already identified and priced by COMESA. [↑](#footnote-ref-22)
22. 1 Modify, in order to reflect the output required, as described in Annex C. [↑](#footnote-ref-23)