

**TENDER NO: SACU / 009 / 2019 / O**  
**DEVELOPMENT OF SACU EXTRANET SITE**

The SACU Secretariat wishes to appoint a suitably qualified, experienced and reputable Information Communications Technology (ICT) Company to develop and implement a SharePoint based Extranet System for the SACU Secretariat.

The detailed Terms of Reference (ToR) document can be obtained online at [www.sacu.int](http://www.sacu.int) OR directly from the SACU Secretariat Offices at Erf: 8531 Corner of Lazarett and Feld Street, Windhoek, Namibia.

**For Commercial enquiries, please contact:**

Mr. Hermanus L. Esterhuizen  
Procurement Officer  
Tel: +264 61 295 8000/37  
Fax: +264 61 245 611  
E-mail: [Leon.Esterhuizen@sacu.int](mailto:Leon.Esterhuizen@sacu.int)

**For Technical Enquiries, please contact:**

Mr. Refiloe Motjolo-pane  
ICT Manager  
Tel: (+264) 61 295 8000/41  
Fax: (+264) 61 245 611  
Email: [Refiloe.Motjolo-pane@sacu.int](mailto:Refiloe.Motjolo-pane@sacu.int)

**Closing Date & Time: 17h00 (Namibian time) on Friday, 27 July 2018.**

The SACU Secretariat reserves the right to accept or reject any proposal that fails to meet its requirements and will not, in any case, be responsible or liable for any costs associated with the preparation and submission of any proposal. Kindly note that only short-listed bidders will be contacted. **Please note that this tender requires two offers, a technical and a financial offer, submitted in separate envelopes as stipulated in the ToR document.**



**TENDER NUMBER: SACU/009/2019/O**  
**DEVELOPMENT OF SACU EXTRANET SITE**

**CLOSING DATE and TIME**

**27/07/2018 - 17H00 (Namibian Time)**

**POSTAL and PHYSICAL ADDRESS FOR TENDER SUBMISSION**

**Southern African Customs Union (SACU) - Secretariat**  
**Private Bag 13285**  
**Corner Lazarett and Feld Street**  
**Windhoek, Namibia, 9000**

**COMMERCIAL ENQUIRIES**

**Mr. Hermanus L. Esterhuizen**  
**Procurement Officer**  
**Tel: +264 (61) 295-8000/37**  
**Fax: +264 (61) 245 611**  
**Email: [Leon.Esterhuizen@sacu.int](mailto:Leon.Esterhuizen@sacu.int)**

**TECHNICAL ENQUIRIES**

**Mr. Refiloe Motjoloane**  
**ICT Manager**  
**Tel: +264 (61) 295-8000/41**  
**Fax: +264 (61) 245 611**  
**Email: [Refiloe.Motjoloane@sacu.int](mailto:Refiloe.Motjoloane@sacu.int)**

**NO. OF TENDER COPIES REQUIRED**

**6 (1 original plus 5 copies of the original)**

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## 1 BACKGROUND

- 1.1 The Southern African Customs Union (SACU) consists of five Member States, namely Botswana, Lesotho, Namibia, South Africa and the Kingdom of Eswatini. More information is available on SACU's website (<http://www.sacu.int>).
- 1.2 The SACU Secretariat (Secretariat) was established in 2004 and is responsible for the day-to-day administration of SACU. The Secretariat also coordinates and monitors the implementation of all decisions of the Council.
- 1.3 The Secretariat is located at the Corner of Lazarett and Feld Streets, ERF 8531, in Windhoek Namibia. It is headed by the Executive Secretary and employs approximately forty-five (45) personnel all of whom are based in Windhoek, Namibia.
- 1.4 The Secretariat has developed an Electronic Documents and Records Management System (EDRMS) that is used as an internal online collaboration, documents and records management system. This solution is based on the SharePoint 2013 platform.
- 1.5 The Secretariat intends to extend similar services to external stakeholders in a secure and controlled manner. The envisaged external stakeholders include the following SACU Institutions:
  - (a) Summit of Heads of State and Government;
  - (b) Council of Ministers;
  - (c) Ministerial Task Teams;
  - (d) Commission;
  - (e) Technical Liaison Committees;
  - (f) Tariff Board;
  - (g) Ad hoc Tribunal; and
  - (h) Any other Stakeholder that may be directed access from time to time.

## 2 OBJECTIVES

- 2.1 The objective of this project is to appoint a suitably qualified, experienced and reputable Information Communications Technology (ICT) Company to develop and implement a SharePoint based Extranet System for SACU Institutions. The system will serve as an online collaboration and Documents and Records Management Platform for SACU Institutions and must be based on SharePoint Technologies.

### **3 PROJECT EXECUTION METHODOLOGY**

- 3.1.1 The appointed Service Provider shall be expected to use Agile Development Methodologies in executing this project. High emphasis is made on designing a prototype of the site and transforming it through evolutionary stages with the involvement of the designated Secretariat Staff until the final product is delivered.
- 3.1.2 The appointed Service Provider must be prepared to provide different conceptual designs showcasing various system elements at various stages of the project to allow for the Secretariat personnel to choose the most suitable and appropriate design.

### **4 SCOPE OF SERVICES**

The following stages of the software development lifecycle **MUST** be covered within the scope of this assignment:

#### **4.1 Project Planning and Mobilization (Stage 1)**

- 4.1.1 This stage of the project must cater for the planning of the project to ensure that it is adequately planned for and that agreement has been reached between the selected Service Provider and the Secretariat in terms of how the project will be executed.
- 4.1.2 The outcome from this stage shall be a project charter and a project plan.

#### **4.2 Requirements Analysis and Design (Stage 2)**

- 4.2.1 The appointed Service Provider shall be expected to conduct requirements gathering sessions with the Secretariat's stakeholders to confirm the following:
- (a) the site organisational structures;
  - (b) the sites and sub-sites required;
  - (c) the navigation menus;
  - (d) the look and feel of the system;
  - (e) the content organisation structures;
  - (f) collaboration requirements;
  - (g) the user access requirements;
  - (h) access rules per site and per content item;
  - (i) other functional and non-functional requirements of the system; and
  - (j) the technical configuration and placement of the Extranet System.

4.2.2 The expected outcome from this stage shall be a formal Requirements Specification document which addresses both the functional and non-functional requirements of the system as well as the technical configurations of the System.

### 4.3 Design (Stage 3)

4.3.1 The appointed Service Provider shall be expected to come up with various designs addressing both the technical architecture of the solution as well as the functional and non-functional requirements specified in section 4.2 of this Terms of Reference.

4.3.2 The outline design of the solution must address among others the following functional and non-functional design requirements:

- (a) the logical architecture of the system;
- (b) the sites and sub-sites required;
- (c) the site organisation;
- (d) the navigation options;
- (e) the content organisation structures;
- (f) the look and feel of the system;
- (g) collaboration approaches;
- (h) the user access and authentication methods; and
- (i) other functional and non-functional requirements of the system.

4.3.3 The outline design of the solution must address among others the following technical design requirements:

- (a) the hardware and software requirements for the resulting solution;
- (b) server farm topologies envisaged for implementation;
- (c) envisaged method(s) for user authentication; and
- (d) network placement of the system's components within the SACU network architecture; and
- (e) the physical architecture identifying the system components relative to the overall SACU network architecture identifying among others the zone(s) in which the components will reside.

4.3.4 The expected outcome from this stage shall be as follows:

- (a) a formal Design document addressing both the functional and non-functional requirements as well as the technical architecture of the solution;
- (b) various design concepts for approval by designated Secretariat personnel; and

- (c) an evolutionary prototype showcasing design elements building up to the final product to be delivered.

#### **4.4 Development and Testing (Stage 4)**

- 4.4.1 The Service Provider will be required to develop the SACU Extranet Solution based on the requirements outlined in Stage 2 and the design outlined in Stage 3 in an iterative evolutionary manner.
- 4.4.2 The service provider will also be expected to undertake system testing to ensure that all the evolutionary builds up to the final product delivered have been adequately tested and confirmed to be working in accordance with their specifications. These tests must include but not limited to the following types of tests:
  - (a) unit and integration testing;
  - (b) load and performance testing; and
  - (c) browser compatibility testing.
- 4.4.3 The expected outcome from this stage shall an Extranet System that has been adequately tested by the Service Provider and ready for User Acceptance Testing.

#### **4.5 System Installation and Configuration (Stage 5)**

- 4.5.1 The appointed Service Provider shall be required to install and configure the final product on a virtual server environment of the Secretariat. This shall include the following activities:
  - (a) setup of the server environments required to host the Extranet solution;
  - (b) configuration of the network architecture designed for the Extranet System; and
  - (c) installation and configuration of the Extranet Solution and all its components on the server environment.
- 4.5.2 The Service Provider shall also be required to test the system installation and configurations to ensure that all components work as required.
- 4.5.3 The outcome of this stage shall be a fully installed and configured Extranet Solution.

#### **4.6 User Acceptance Testing (Stage 6)**

- 4.6.1 The appointed Service Provider shall be required to facilitate various User Acceptance Testing (UAT) sessions in an iterative manner. This facilitation shall include:
- (a) aiding the Secretariat staff in testing the various usage scenarios of the system;
  - (b) developing testing materials in advance and obtaining necessary approvals for the tools; and
  - (c) arranging for testing sessions with the Project Manager.
- 4.6.2 The Service Provider shall also be required to rectify any issues raised during UAT, perform bug fixes, and provide feedback on the issues raised.
- 4.6.3 The outcomes of this stage shall be as follows:
- (a) a UAT report identifying the issues raised, solutions provided, any outstanding issues as well as conclusions reached on outstanding issues; and
  - (b) a robust and fully tested Extranet Solution;

#### **4.7 Training and Skills Transfer (Stage 7)**

- 4.7.1 The selected Service Provider shall be expected to provide the following types of training and skills transfer mechanisms:
- (a) ICT Administrator training and hand-over session - this shall be delivered by formal hand-over of systems' technical training as well as training and coaching of ICT administrators on the technical configurations of the system and methods by which the system can be maintained;
  - (b) Systems Administrator training - this shall be through a detailed class-room style training to administrators and super users of the system to enable them to administer and maintain the system; and
  - (c) End-user Training - this shall be through a theatre-style training for all end-users of the system to enable them to be able to navigate and use the various functions of the system. This shall be in two stages, the first will be for the Staff Members of the SACU Secretariat and the second shall be for the members of the SACU institutions.
- 4.7.2 The outcomes of Stage 7 shall be as follows:
- (a) formal training provided to ICT Administrators, System Administrators and End-Users; and
  - (b) all system documentation including the system source codes, the technical and user manuals handed over to relevant Secretariat's staff.



#### **4.8 System Go-Live and Project Closure (Stage 8)**

- 4.8.1 Upon completion of the project, the Service Provider shall be required to formally put the system online and to initiate a formal project closure process through submission of a formal sign-off document. This document shall indicate the project activities completed, have a provision for sign-off for each area completed and have a provision for two signatories at both ends (i.e. Service Provider and Secretariat) for final approval of work done.
- 4.8.2 The expected outcomes from this stage shall be as follows:
- (a) live SACU Extranet System; and
  - (b) a fully completed project sign-off document.

#### **4.9 Warranties, Maintenance and Support (Stage 9)**

- 4.9.1 The successful Service Provider shall be required to provide a post-implementation warranty for a period of 6-months following the system go-live date. This warranty shall serve as a guarantee that the system will work in accordance with its specification and obliges the Service Provider to eliminate any system defects through rectifying any system issues and performing bug-fixes at no additional charge to the Secretariat.
- 4.9.2 The Service Provider shall also be required to maintain and support the system at no additional cost to the Secretariat for the duration of the warranty period.
- 4.9.3 The Service Provider will be required to provide an option for on-going maintenance and support on the system following expiry of the warranty. The on-going maintenance and support service shall:
- (a) be 12 months long each instance;
  - (b) be optionally renewable;
  - (c) include maintenance of the software and entitles the Secretariat to all patches and updates of the system; and
  - (d) include a support service that entitles the Secretariat to report and get assistance on any technical issues experienced on the system.

### **5 CONTEXTUAL VIEW OF THE ENVISAGED EXTRANET SOLUTION**

While the exact features of the system will be confirmed during the Requirements Specification Stage, the Secretariat envisages a solution that has the following features at this stage:

## 5.1 Web Based System

- 5.1.1 The system will be web-based and accessible to internal staff local on the internal Local Area Network (LAN) or remotely via the Internet.
- 5.1.2 The System will also be accessible by Members of the Institutions of SACU remotely over the Internet.
- 5.1.3 There shall be robust and secure mechanisms through which these category users can access the system remotely over the Internet.
- 5.1.4 All users accessing the system shall be authenticated prior to accessing the system. The design of the authentication mechanisms for the various types of users shall be discussed and agreed upon during the system design stage.

## 5.2 Envisaged System Components

- 5.2.1 The system will have a **System Administration** component that enables administrative users manage users and perform other administrative functions of the system.
- 5.2.2 The system will have the following **Enterprise Content Management** functionality to enable management of document through-out their entire life-cycle:
  - (a) **Documents Management** - this component will serve as a storage facility for documents in their non-final form (drafts). It should cater for the following functionality:
    - i). allow users to create, update and share documents;
    - ii). have an organisation structure with different access privileges on how the documents in this component shall be organised and accessed;
    - iii). have different storage libraries for different user groups;
    - iv). allow simultaneous access and edits of documents by multiple users;
    - v). support for different file formats;
    - vi). have document check-out and check-in features;
    - vii). have version management features; and
    - viii). have document retention management and archival/disposal features.
  - (b) **Enterprise Workflows** - this component should work along the documents management component thereby enabling documents to be reviewed at defined stages until final approval. It should serve as a vehicle for collaboration and facilitating draft documents to be reviewed until they are approved and declared as records.
  - (c) **Records Management** - this component shall serve as a storage facility for the documents in their final form. It should cater for the following functionality:
    - i). allow users to declare documents in their final stage as records;

- ii). have an organisation structure with different access privileges on how the records in this component shall be organised and accessed; and
- iii). have a records retention management and archival/disposal features.

5.2.3 The system will also have the following functionality:

- (a) **Reporting Functionality** - this will have basic reports for monitoring the usage of the system;
- (b) **Content Search Functionality** - this should enable users to search for content within the system using various search expressions. The Search feature should also be able to filter their results by aspects such as the file types, the author of documents and the modification dates; and
- (c) **System Transaction Logs** - this should be accessible to administrative users and should provide a clear account and audit of who did what and when. The logs should be printer-friendly and filterable by the date of transactions, by user and by type of activity.

## 6 PROJECT QUALITY ASSURANCE

6.1 All deliverables shall be internally reviewed by the Service Provider prior to submission to the Secretariat and further subjected to the Secretariat's internal review process prior to adoption and approval.

## 7 PROJECT DELIVERABLES

7.1 The following deliverables shall be expected from the execution of the project and shall form the basis for the costs associated to the project:

- (a) Project Charter with a detailed project implementation plan;
- (b) Requirements Specification Document;
- (c) System Design Document;
- (d) Evolutionary builds of the System and Final Extranet System;
- (e) Fully installed and configured Extranet System;
- (f) Signed-off User Acceptance Testing;
- (g) Training provided to ICT Administrators, System Administrators and End-Users;
- (h) System documentation including source codes, technical and user manuals;
- (i) Live SACU Extranet System; and
- (j) Formal Project Sign-off.

## **8 METHODOLOGY**

- 8.1 Prospective bidders must clearly outline the approach in which the project will be executed. This approach must be supported by an outline project plan identifying the high-level activities to be undertaken, the key project milestones, and an indicative time-frame indicating the duration of the activity.
- 8.2 There must also be an outline architectural design of the system outlining the various components of the solution and highlighting implementation concept envisaged for the SACU Extranet Solution.

## **9 REQUIRED SKILLS AND EXPERIENCE**

- 9.1 Prospective bidders must possess the following skills and experience:
- (a) Must possess a minimum of five (5) years' experience developing similar systems, having completed a minimum of five (5) similar projects (attach company projects portfolio to substantiate company experience) to Medium (>50 users) to Large enterprises (>100 users);
  - (b) Must have allocated project team members with skills, experience and professional certifications in the following areas:
    - i). SharePoint Server 2013/2016;
    - ii). SharePoint Collaboration and Document Management 2013/2016;
    - iii). Networks and Security Management;
    - iv). Fortigate/Fortinet NSE;
    - v). Microsoft Hyper-V; and
    - vi). Veeam Backup and Recovery;

## **10 PROJECT TIMELINES**

- 10.1 The timelines for this initiative are as follows:
- (a) the project specification documents must be delivered within four (4) weeks from order date;
  - (b) the design document must be delivered within six (6) weeks from order date;
  - (c) the first prototype or build of the system must be produced within ten (10) weeks from order date;
  - (d) is final system for implementation must be completed within eighteen (18) weeks from order date; and
  - (e) the entire project (excluding warranty and maintenance stages) must be completed in no-more than 20 weeks from order date.

## 11 SUBMISSION OF TENDER PROPOSALS

- 11.1 SACU implements a two-envelope tender process, meaning that the **Technical** and **Financial** Proposals must be submitted in separately sealed envelopes.
- 11.2 The Tender should be delivered or posted to the “Postal and Physical Address for Tender Submission” specified on the cover page.
- 11.3 All bidders must submit six (6) complete hard copies of the Technical Proposal and six (6) complete hard copies of the Financial Proposal. (Copies must include certified copies of all eligibility documentation).
- 11.4 The proposals should be **neatly bound and presentable**.
- 11.5 The technical proposals should be inserted in a separate envelope, clearly marked “**Technical Proposal**” and the financial proposals should be placed in their own separate envelope clearly marked “**Financial Proposal**”. All envelopes should be properly sealed and clearly marked as indicated below:

**TECHNICAL PROPOSAL / FINANCIAL PROPOSAL**

**TENDER NUMBER: SACU/009/2019/O**

**DEVELOPMENT OF SACU EXTRANET SITE**

**NAME OF THE BIDDING COMPANY/ORGANISATION/FIRM**

- 11.6 The deadline for the submission of tenders is **27 JULY 2018 (17h00 Namibian Time)**.

## 12 PRIME CONTRACTOR RELATIONSHIP

- 12.1 SACU will enter into a contract with only one successful bidder.
- 12.2 The selected bidder shall be solely responsible for the deliverables as specified in this document.

## 13 FINANCIAL ARRANGEMENTS

- 13.1 Bidders are solely responsible for their own costs in preparing the tender.
- 13.2 Payments for all services (professional fees and disbursement fees) covered by this tender shall be made within 30 (thirty) days subject to receipt of appropriate invoices, the satisfactory completion of work, and adherence to the SACU Secretariat’s Financial Policies and Procedures.
- 13.3 SACU shall not be liable for any losses, damages, costs, charges or expenses caused by injuries to the bidder’s personnel during the execution of their duties.

## 14 CONFIDENTIALITY

- 14.1 Tenders submitted will not be revealed to any other bidders and will be treated as contractually binding.
- 14.2 SACU reserves the right to seek clarification or verification of any information contained in the tenders.
- 14.3 SACU reserves the right to undertake a full background check on all references submitted prior to awarding the contract.
- 14.4 All information pertaining to SACU obtained by the bidder as a result of participation in this tender is confidential and must not be disclosed without written authorisation from the Executive Secretary of SACU.

## 15 OWNERSHIP OF DATA

- 15.1 All tenders, including any supporting documents with reference to this tender, submitted to the SACU Secretariat becomes the property of SACU.
- 15.2 Ownership of all data belonging to SACU whether under its control or the bidder's control shall continue to vest in SACU. Any data of whatever nature resulting from the provision of the Services shall be the property of SACU and may be used by SACU without restriction. All data or information that may be shared with the successful bidder during the provision of the services shall upon termination of the contract, be returned to the SACU Secretariat.

## 16 MODIFICATION OF TERMS

- 16.1 The SACU Secretariat reserves the right to add, modify or omit certain portions of the tender scope at any time at its sole discretion. This includes the right to cancel this tender at any time prior to entering into a contract with the successful bidder.

## 17 ELIGIBILITY CRITERIA

- 17.1 Tenders will be disqualified if one (1) original and five (5) copies of the Technical and Financial proposal, are not submitted in separate envelopes. Each copy of the Technical Proposal submitted must contain **certified copies** of the compliance documents indicated in section 17.2 and 17.3 below.
- 17.2 Tenders will be disqualified if the following documents have not been submitted:
- (a) A **certified copy** of a Certificate of Registration or Incorporation with the relevant national authorities for companies or corporations; and
  - (b) A **certified copy** of a current Tax Clearance Certificate or exemption thereof from the relevant national authorities.

(c) Where applicable, a **certified copy** of a legal agreement for partnerships, consortiums and joint ventures.

17.3 Tenders will be **disqualified** if the company is not majority (51%) owned by citizen(s) of a SACU Member State (with proof of shareholding) and registered within a SACU Member State.

17.4 Tenders will be **disqualified** if the company's current or past shareholding or other interests may, in the SACU Secretariat's opinion, give rise to a conflict of interest in connection with this tender.

## **18 AWARD CRITERIA**

18.1 The contract will be awarded to eligible bidders on the basis of the most economically advantageous proposal by applying the following criteria:

- (a) Proposed Methodology and Understanding of the Assignment;
- (b) Similar Assignments and Experience of the Bidder; and
- (c) Technical Knowledge and Qualifications of the Bidder's allocated Team Members.

## **19 CONTRACT ADMINISTRATION**

19.1 The award will be subject to the successful conclusion of a Service Level Agreement (SLA) to confirm the Terms and Conditions of the Tender.

19.2 SACU reserves the right to negotiate the terms of the tender proposal and the value of any financial proposal submitted.

## **20 TECHNICAL PROPOSAL (1<sup>ST</sup> ENVELOPE)**

Each Technical Proposal (1<sup>st</sup> Envelope) must contain the following information:

### **A - GENERAL INFORMATION**

20.1 A letter of introduction identifying the company and signed by the person(s) authorised to bind the organisation to all the statements made in the proposal.

20.2 A Company Profile that describes the organisation, its history, its people, its experience, its market and its products and services.

20.3 Proof of qualifications and experience of key staff that will carry out the assignment, including the Team Leader.

20.4 A certified copy of a Certificate of Registration or Incorporation with the relevant national authorities for companies or corporations.

- 20.5 An original plus certified copies of a current Tax Clearance Certificate or exemption thereof from relevant national authorities.
- 20.6 A certified copy of the company's current Audited Financial Statements.
- 20.7 Certified proof that the company or consortium is majority (51%) owned by citizen(s) of a SACU Member State (attach shareholding certificates and copies of shareholders' IDs/Passports, etc.).
- 20.8 Where a consortium or a group of companies are jointly delivering a response, then the companies must:
- (a) clearly state the name of the Primary Party with whom SACU will enter into an Agreement;
  - (b) provide full details of each of the legal entities involved in the bid;
  - (c) provide a certified copy of a legally binding partnership or consortium agreement;
  - (d) provide a detailed description of the role or element fulfilled by each legal entity involved in the bid; and
  - (e) provide the compliance documents for each of the Parties involved in the bid.

## **B - METHODOLOGY**

- 20.9 A detailed proposal which indicates a clear understanding of the objectives of the assignment and clearly outlines how the proponent will go about developing the SACU Extranet Site. This must be accompanied by an outline project plan indicating the high-level activities involved in the project with their expected targets for completion as well as an outline conceptual architecture of the solution proposed.

## **C - SIMILAR ASSIGNMENTS AND REFERENCES**

- 20.10 A schedule of **five (5) or more recent and similar assignments** undertaken by the company. This schedule must indicate the client, the assignment that was undertaken, the year, the client's geographical location and the financial value.

*For example:*

Client	Services Provided	Year	Location	Financial Value
ABC Corporation	<u>Development of IT Governance Framework</u>	2016	Windhoek	ZAR XXX,XXX.XX



20.11 A schedule of **five (5) or more clients** (contact names, physical addresses and telephone numbers) who may be contacted for references in connection with the proposed assignment.

*For example:*

Client	Contact Name	Telephone	Physical Address
ABC Corporation	Mr J. Doe	061-999 9999	20 ABC Street, Windhoek

#### **D - ADDITIONAL INFORMATION**

20.12 Bidders may provide any other information which may support or be relevant to their tender proposal. This may include product brochures, manuals and other marketing paraphernalia.

#### **21 FINANCIAL PROPOSAL (2<sup>ND</sup> ENVELOPE)**

21.1 The Financial Proposal (2<sup>nd</sup> Envelope) must contain a schedule of costs in the following format:

- (a) All costs must be quoted in South African Rand (ZAR);
- (b) The total cost of the proposal (best and final offer);
- (c) An itemised breakdown of the cost of all options being proposed (if any);
- (d) The applicable rate of VAT in respect of each product and service being proposed; and
- (e) Details of any other costs, taxes or duties which may be incurred.

21.2 The Financial Proposal must contain a written confirmation that the proposed costs remain valid for 90 days from the tender closing date.

## 22 DOCUMENTATION CHECKLIST

Have you submitted the following required information?	YES
A Signed Letter of Introduction	
A Profile of the Company	
Proof of qualifications and experience of key staff that will carry out the assignment	
A Certified Copy of a Certificate of Company Registration or Incorporation	
A Certified Copy of Certificate of a Tax Clearance Certificate	
A Certified Copy of the Company's Audited Financial Statements	
Certified Proof that the majority owner(s) $\geq$ 51% of the company or consortium are citizens of a SACU Member State [Attach ID copies of Shareholders]	
A schedule of five (5) or more similar assignments undertaken by the company	
A schedule of 5 (five) or more contactable references	
An itemised break down of the costs in a separate financial proposal	
Written confirmation that the financial proposal remains valid for 90 days	
One (1) original and five (5) copies of each proposal, Technical and Financial, in separate envelopes	

Additional documents required from Consortiums or Partnerships	YES
Written identification of the Primary Contracting Party	
Full details of all legal entities involved in the bid	
Certified copy of a legally binding partnership or consortium agreement	
Description of the role or element fulfilled by each legal entity	