Call for Proposals for the SharePoint Implementation, Planning, Development, and Project Consulting

Deadline for receipt of tenders: 28.11.2022, 23:59 CET
Table of Contents

TABLE OF CONTENTS .......................................................................................................................... 2

1 TERMS OF REFERENCE .................................................................................................................. 4

1.1 BACKGROUND .............................................................................................................................. 4
1.2 OBJECTIVES OF THE ASSIGNMENT .......................................................................................... 4
1.3 SCOPE OF WORK ........................................................................................................................... 6
1.4 CALL FOR TENDERS TIMETABLE ............................................................................................... 8
1.5 DETAILED DESCRIPTION OF THE DELIVERABLES ................................................................. 8
1.6 BUSINESS SCENARIOS ............................................................................................................... 13
1.7 THIRD-PARTIES INTEGRATIONS ................................................................................................. 16
1.8 REQUIREMENTS FOR THE UX/UI PHASE OF THE INTRANET ............................................. 17
1.9 OPTION 1 – CONTRACT MANAGEMENT .................................................................................. 17
1.9.0 Introduction ............................................................................................................................... 17
1.9.1 Functional requirements .......................................................................................................... 18
1.10 OPTION 2 – DATA CLASSIFICATION .................................................................................... 20
1.10.1 Introduction ............................................................................................................................ 20
1.10.2 Functional requirements ......................................................................................................... 20

2 PROPOSAL ..................................................................................................................................... 22

2.1 BIDDERS PROPOSAL ................................................................................................................... 22
2.1.1 Process ..................................................................................................................................... 22
2.2 PROJECT MANAGEMENT ............................................................................................................ 23
2.2.1 Work Location ......................................................................................................................... 23
2.2.2 Guarantee ............................................................................................................................... 23
2.2.3 Experience of the supplier ....................................................................................................... 23
2.3 TEAM COMPOSITION AND QUALIFICATION REQUIREMENTS FOR KEY EXPERTS .......... 23
2.4 FINANCIAL OFFER ....................................................................................................................... 24

3 PROCEDURES FOR ANSWERING THE CALL FOR TENDER AND CONTENT OF THE TENDER .... 25

3.1 PREPARATION OF THE TENDER ............................................................................................... 25
3.2 COSTS OF TENDER RESPONSE ................................................................................................. 26
3.3 PERIOD OF VALIDITY OF THE TENDER ..................................................................................... 26
3.4 FORMALITIES AND SIGNING OF TENDERS ............................................................................ 26
3.5 DATE OF SUBMISSION OF TENDERS ....................................................................................... 26
3.6 PRICES QUOTED IN TENDERS ................................................................................................. 26
3.7 LANGUAGE .................................................................................................................................. 27
3.8 REQUESTS FOR INFORMATION OR CLARIFICATION OF THE CALL FOR TENDER ............ 27
3.9 MODIFICATION AND WITHDRAWAL OF THE CALL FOR TENDER ......................................... 27
3.10 MODIFICATION AND WITHDRAWAL OF THE TENDER .......................................................... 28
3.11 SUBCONTRACTING .................................................................................................................... 28

4. ASSESSMENT AND AWARD OF CONTRACT ............................................................................... 29

4.1 EXCLUSION CRITERIA ................................................................................................................. 29
4.2 ETHICS CLAUSES ......................................................................................................................... 29
4.3 SELECTION CRITERIA ................................................................................................................... 30
4.4 AWARD CRITERIA ......................................................................................................................... 30
WCO I OMD Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting

4.5 Points ............................................................................................................................................. 31
4.6 Project Proposal .................................................................................................................................. 31
4.7 Financial Proposal .................................................................................................................................. 31
4.8 Award of the Contract .......................................................................................................................... 32
4.9 No Obligation to Award a Contract ................................................................................................... 32
4.10 Special Provisions ............................................................................................................................... 33
4.11 Request for Information – Complaints .............................................................................................. 33
4.12 Acceptance of the Conditions of the Call for Tender and Provisions Applicable to the Agreement 33
4.13 Payment Scheme .................................................................................................................................. 33
1 Terms of reference

1.1 Background

The World Customs Organization (WCO) is an independent intergovernmental body, established in 1952 as the Customs Co-operation Council (CCC), whose mission is to enhance the effectiveness and efficiency of Customs services across the globe. The WCO represents 184 Customs administrations that collectively process approximately 98% of world trade. As the global centre of Customs expertise, the WCO is the only international Organization with competence in Customs matters.

As a forum for dialogue and exchange of experiences between national Customs delegates, the WCO offers its members a range of Conventions and other international instruments, as well as technical assistance and training services provided either directly by the Secretariat, or with its participation. The Secretariat also actively supports its members in their endeavors to modernize and build capacity within their national Customs administrations.

WCO currently utilizes different media to store and manage official WCO documents (file folders, Business applications…). With the ongoing modernization in the Organization and the use of the M365 eco-system, the WCO is now looking to transfer all its information to SharePoint Online to allow for better control, ease of remote access, and provide better search capabilities and overall M365 integrations.

The WCO’s current state is SharePoint online 365 with approximately:

- Total number of 11 Teams sites
- Total number of 60 “My sites”
- Total SP storage of 4 TB
- Total of 2.5 million files on network drives included in 300 000 folders
- Total of around 4 TB on network drives
- Total of 300 employees

The purpose of this solicitation and the resulting contract is to obtain the services of a qualified supplier to provide a SharePoint Online solution for a new intranet architecture, content migration, and robust search experience. The WCO expects the supplier to provide the design and implementation of the Solution including solutions for limitations of SharePoint & OneDrive.

1.2 Objectives of the assignment

The WCO is soliciting proposals to supply consulting services for the migration of the WCO information from the existing Windows file server folders to SharePoint Online. Since several end-users have already started to use SharePoint Online the project will also review the current configuration and bring updates when needed to align with the entire migration and SharePoint Online configuration.

The WCO requires a Microsoft Partner ‘M365 Fast Track Ready’ with at least gold or silver competencies for Collaboration Content, and Security, to implement SharePoint Online. The
The project does not include the implementation of Outlook, and MS Teams per se, but does include any configuration of the aforementioned environments required for seamless integration with the WCO’s SharePoint Online implementation.

The WCO expects that the offer should not exceed a maximum value of 140,000 Euros costs and is keen to receive proposals for solutions that are in line with its Organizational size and available budget, whilst meeting the requirements and providing value for money.

Option 1 on Document Classification and the option 2 on Contract Management are of the maximum value of 50,000 Euros each (100,000 Euros for the two options on top of the 140,000 Euros for the initial project).

The general goals of the project are as follows:

- Migrate all content that is currently on WCO’s file drives and existing non-standard SharePoint sites;
- Create a new Intranet to ensure the proper internal flow of information & internal business applications for WCO’s employees;
- Change Management. That contains user adoption, training, and general governance.

To achieve these goals, our objectives are to:

- Migrate content that is on the existing file drives
  - Better understanding of what business scenarios are best met with the SharePoint Online technology and implement business automation processes and workflows for departments;
  - Establish an efficient document management process throughout the Organization. Provide a structured taxonomy and metadata for the WCO departments and Services; to improve our ability to find relevant content in a diverse collection of content and to improve our ability to learn from the patterns and trends that emerge from a large collection of content without manually reviewing each piece of content;
  - Improve productivity of employees by simplifying and improving access to business systems; and
  - Establish a usable and searchable information architecture that provides relevant results (Site Map, Content Types, and Metadata)
  - Improves unstructured information management capabilities (reducing the redundancies of business documents and frequent email transfers).
  - Accelerates workflow throughput.
  - OPTION 1 – Contract Management. Implement a system to aggregate contracts as mentioned below in chapter 1.9.
  - OPTION 2 – Data Classification. Implement workflows and implementation as mentioned below in chapter 1.10. (note: the costs for a potential extra license will need to be shown in the financial offer).

- Create a new Intranet to ensure the proper internal flow of information & internal business applications for WCO’s employees
  - Work closely with all departments to design a site that will accommodate identified functional requirements;
WCO I OMD Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting

- Provide a user-friendly and sustainable new intranet;
- Intranet and other WCO sites to be built with Modern SharePoint site page and use SPFx for customization. The source code for any customization is to be shared with the WCO ISTS team;
- Provides all departments within the Organization with more cost-effective access to documents and related information. Create an Organisation template and reuse it to create further sites and create an Organization template for the common Intranet;
- Supports integration of tools and data specifically with MS Office and web-based applications; and
- Implement the workflow for digital signatures. (note: the license costs of the digital signature solution are outside the budget of this project).

- Ensure Change Management. That contains user adoption, training, and general governance
  - Eliminates and/or minimizes paper documents and manual processing through the option (e-signing and Document Classification) but also the training strategy;
  - Improves collaboration capability between departments through advice and suggestions;
  - Provide a Train-the-Trainer training session for Information Technology staff;
  - Establish Help & Support and train staff to know where to obtain support as end users, site owners, or site contributors; Develop a strategy for user-adoption and
  - Establish, adopt, and implement governance throughout the Organization.

The WCO envisages the implementation of SharePoint to happen in two phases unless suggested and justified otherwise by the IT partner:

- Phase 1: Refine the WCO specifications/requirements and enable the use of SharePoint Online for the WCO.

  Phase 2: Migrate information from defined WCO data sources to SharePoint Online in waves and standardize the SharePoint sites and files already migrated. Develop automation of business processes and workflows. Phase 2 will take place in waves with selected directorates and departments.

- Phase 3: Contract Management and/or Data Classification if selected by the WCO.

This RFP provides the requirements and evaluation criteria for implementing SharePoint Online. The WCO requests detailed responses from all prospective qualified suppliers, including pricing, and service descriptions, in a specified format. The WCO will conduct a review of the responses received from this RFP to contract with a supplier with extensive experience with SharePoint requirements as set out in this RFP.

1.3 Scope of Work

Current business processes and workflows are not automated, integrated, or efficient.
Processing a simple document can include numerous steps, including signing, printing, signing again, copying, emailing, etc. Implementing an automated system that integrates our contact information and documents, grant management, calendaring, and reporting, as well as integration with our accounting and human resources systems, will enable the WCO to enhance and improve the effectiveness and efficiency of WCO services and business processes.

Migration will be done in a wave approach (by Services) which will ensure lessons learned from one wave are not replicated for the next one. The supplier shall provide a full SharePoint Online platform based on Organization needs that deliver the following:

- The solution must demonstrate core capabilities for the full information management lifecycle from inception to archive (or deletion) while providing specific access controls.
- The supplier must collaborate with WCO databases to connect SharePoint to interface with WCO’s existing management system (HR system UKG, ERP MS Dynamics).
- The solution must provide the ability to classify documents with metadata to make them easier to search and ensure a mandatory amount of metadata is captured for each document or record in the library.
- The solution shall provide retention policies for record conversion, archival, and deletion which can be set on a document type and executed automatically based on a preconfigured date.
- The supplier shall migrate corporate filer server data (as identified and outlined by WCO) to SharePoint and shall permit navigational security, with multiple layers of user-definable security to limit access.
- The solution shall permit electronic signature management – support for inserting signatures and managing records content and access
- The solution must provide the capability for the creation of online forms where users can request support from various internal services. The form should be compatible with desktop and portable devices. Forms should be created using Power Apps or SPFx development.
- The solution will define and provide a new WCO dynamic intranet integrated into Teams.
- The solution will define and provide a Contract Management system (option 1)
- The solution will define and implement a Data Classification model and process (option 2)

The project will be implemented in three phases.

**Phase 1: Refine the WCO specifications/requirements and enable the use of SharePoint Online for the WCO**

The principal objective of Phase 1 is to provide the WCO with a SharePoint Site that it can use to store and share documents.

The Supplier shall provide a turn-key solution that meets the WCO’s requirements, including but not limited to:

1) Discovery and Analysis
   i. An inventory of the data items, including properties such as name size, date created and/or changed file type, and any metadata held.
   ii. A list of processes, workflows, or rules that the Organization uses to manage the data.
   iii. Figma files, Workflow diagram along with the business requirements.
Phase 2: Migrate information from defined WCO data sources to SharePoint Online in waves and standardize the SharePoint sites and files already migrated. Develop automation of business processes and workflows

Note: Depending on the nature of the outcome’s work, work may even commence before the completion of Phase 1

- Implement the project plan
  - Sites construction and configuration: Set of Organization templates to be used by users to create new sites
  - Intranet development
  - Search capabilities
  - Metadata configuration …
- Implement Business process automation and workflows using Power Automate (not SP designer). The supplier and the WCO project team will have agreed on what processes will be automated prior to the start of Phase 2.
- Implement a digital signature capability. It is noted that extra cost will be required to acquire a digital signature solution
- Testing of the solution
- Train the trainer approach
- Project Management Features
- Provide end-users training on the management of their sites

Phase 3: Contract Management and/or Data Classification if selected by the WCO

After phase 3, is signed off, the selected supplier will ensure:
- A 6 months warranty for important bugs that were of the implemented solution

1.4 Call for tenders Timetable

The estimated schedule for the call for tenders and contract approval is as follows.

<table>
<thead>
<tr>
<th>Event</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launch of the Request for Proposals</td>
<td>20.10.2022</td>
</tr>
<tr>
<td>Deadline for Submission of tenders</td>
<td>28.11.2022</td>
</tr>
<tr>
<td>Evaluation of Technical and Financial bids (including demonstrations for shortlisted bidders)</td>
<td>December 2022</td>
</tr>
<tr>
<td>Signature of contract</td>
<td>December 2022</td>
</tr>
<tr>
<td>Commencement of project</td>
<td>December 2022 / January 2023</td>
</tr>
</tbody>
</table>

1.5 Detailed description of the deliverables

The supplier shall be responsible for managing the supplier’s team and activities and collaborating with WCO on the Solution. The supplier shall provide a project manager as the point-of-contact
for the project who can respond and has the authority to represent the supplier and an enterprise solutions architect who can address a holistic enterprise solution.

Final deliverables will be worked out through the development of the Statement of Work with the selected supplier. The deliverables should support the successful implementation of all the objectives listed in chapter 1.2. The project management methodology used by the WCO will be Prince 2.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Deliverables</th>
</tr>
</thead>
</table>
| Manage the project           | - Provided detailed schedule of supplier activities and expected/dependency WCO activities.  
- Facilitate and provide routine status reports including budgeting, pending decisions, dependencies, schedule, and the overall status of activities, issues, and risks.  
- Facilitate weekly status calls with updated detailed project schedules, issues, risks, budget, and action items.                                                                                                                                       | - WCO M 365 Roadmap (Timeline, WBS, PID...)  
- Status Reports  
- Ticketing system                                                                                                                   |
| Enterprise Solution          | - Provide an enterprise solution diagram and recommendations for the Solution and longer-term goals of WCO, including system integration needs.                                                                                                                                                                                       | - Solution Diagram  
- Recommendations                                                                                                                      |
| Define the governance plan   | - Facilitate and meet with stakeholders to understand WCO specific governance needs and vision.  
- Identify the stakeholders and their vision of the Solution and future phases, including internal users, external users, Senior management, and suppliers.  
- Identify the best practices for the following roles:  
  - administrators  
  - site owners (responsible for managing site access/permission subsites, and basic support tasks)  
  - site contributors (who will have access to create/update/delete content on the site)  
  - site visitors (who will have access to only view site contents)  
- Identify groups:  
  - By WCO’s directorate  
  - By fields of activity  
- Define the maintenance, auditing, and non-compliance procedures for long-term                                                                                                                      | - Governance plan  
- Recommendations for Implementation of On-Demand Solution                                                                                                                                               |
| Define the Information Architecture | • Assess the existing SharePoint, network drive, and archive structures to gain insight and understanding of the existing structures, content types, and metadata  
• Facilitate WCO’s Directorates and Services sessions to define the information architecture, including but not limited to the site map, metadata, and content types  
• Gather during the Division and Department sessions the requirements for external users, Board Members, and supplier stakeholders  
• Support with the strategy to facilitate all Division and Department representatives to an enterprise-wide, user-centered, solution to meet long-term WCO and end-user needs, including minimizing customized solutions and maximizing out-of-box SharePoint Online capabilities.  
• Document WCO specific information architecture, including but not limited to:  
  o mapping existing SharePoint and intranet structures;  
  o identify opportunities to improve content and document management;  
  o define managed metadata and custom column metadata;  
  o site security and compliance requirements;  
  o process re-engineering opportunities or requirements as it relates to the future Solution or usage of SharePoint;  
  o Digital signature technology | • Information Architecture  
• Recommended revisions to Governance Plan & recommendations |
**WCO I OMD Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting**

<table>
<thead>
<tr>
<th><strong>Description</strong></th>
<th><strong>Tasks</strong></th>
</tr>
</thead>
</table>
| Intranet home page site map and navigation; | - Facilitate meetings with WCO staff to define the home, division, department, and team/project site layouts.  
- Present and discuss the UX of the new Intranet  
- Present the UI of the new Intranet.  
- Present, facilitate review and incorporate the feedback on the layouts.  
- Present final page layouts to the Project Board for approval.  
- Recommend intranet content to be created to address gaps between the existing intranet and Solution. |
| Intranet home page elements; | - Intranet Home  
- Page Layouts  
- Intranet Division Layouts  
- Intranet Department Layouts  
- Project Site Layout  
- Content creation recommendations  
- Design documents (figma or similar files) |
| Intranet Division elements; | - Content Strategy  
- Content Migration Guidelines and Recommendations |
| Intranet Department elements; |  
- Present final information architecture and recommendations to the Project Board for approval |

**Describe Content Strategy**

- Assess the existing content and data on the Intranet, network drives, and existing SharePoint Online sites.  
- Conduct a technical content migration workshop to understand the depth and breadth of content, usage, retention requirements, etc. to determine a content strategy.  
- Provide expertise and best practices for establishing content migration guidelines and recommendations including but not limited to:  
  - what data should be restructured and migrated to SharePoint Online;  
  - what content types, file types, and sizes cannot be migrated;  
  - where data should be migrated if not to SP Online;  
  - how to reduce content volume for migration as well as the overall content footprint;  
  - how to migrate data stored in software;  
  - how to maximize search results for end users; and
WCO I OMD Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting

- How to migrate data with legacy hyperlinks and how to set up / replace with new locations (i.e. update bookmarks, spreadsheets to the new architecture, or a database re-direct).
- Archiving

| Migration Plan | • Based on the content strategy, document and define the migration plan including but not limited to: |
|               | o the migration software supplier provides; |
|               | o approach for preparing and verifying content and data for automated versus manual migration; |
|               | o assigning appropriate metadata; |
|               | o roles and responsibilities of the supplier; |
|               | o roles and responsibilities of WCO staff; |
|               | o schedule for migrating (automated and manual) activities; |
|               | o migration assumptions; |
|               | o appropriate training for WCO staff; |
|               | o appropriate access to WCO staff with temporary access to automated migration tool; |
|               | o migration validation and WCO verification and approval; |
|               | o migration issue log repository and process; and |
|               | o Identify files that cannot be migrated and provide options to fix the files for future migration |
|               | o Identify the typology of files that needs to be migrated on SharePoint and those for OneDrive. |

| Implement Solution on WCO Tenant | • Set up and verify the approved information architecture, including but not limited to the term store and term sets, content types, site map, and navigation. |
|                                  | • Set up and verify the security and access. |
|                                  | • Configure search and search templates. |
|                                  | • Set up and verify the approved branding. |
|                                  | • Set up and verify site templates with approved branding. |

<p>| New solution | • Migration plan |</p>
<table>
<thead>
<tr>
<th>Training Plan &amp; Testing</th>
<th>Training Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Recommend a training plan based on the Solution that addresses change management and long-term adoption needs.</td>
<td>- Training plan</td>
</tr>
<tr>
<td>- Integrate the accepted outcomes of the User Acceptance Testing (UAT) of the Solution, including establishing a UAT repository, troubleshooting defects, identifying enhancements for future phases, and addressing WCO staff questions and concerns with the Solution.</td>
<td>-</td>
</tr>
<tr>
<td>- Facilitate meetings to address UAT feedback, prioritize the work to be done and provide the status of each item</td>
<td>-</td>
</tr>
<tr>
<td>- Obtain UAT approval to proceed with Go Live</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>All Staff Training</th>
<th>All staff training</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Provide training sessions to end users including but not limited to navigating O365, the new intranet, new processes (i.e. requesting a private site, content change on a page, etc.), search and search results, user profiles, private team, and project sites.</td>
<td>-</td>
</tr>
<tr>
<td>- Provide training materials and training that is customized to WCO Solution, including branding, fields, and activities</td>
<td>-</td>
</tr>
<tr>
<td>- (List of trainings will be discussed during phase 1 of the project)</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Optional needs</th>
<th>Business Specifications, Price Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Implement a Contract Management System in SharePoint (See chapter 1.9)</td>
<td>-</td>
</tr>
<tr>
<td>- Define and implement a Data Classification model, process and system (See chapter 1.10)</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Future needs</th>
<th>Analysis, Recommendations, and price proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Identify the business processes that require automation not foreseen in this project</td>
<td>-</td>
</tr>
</tbody>
</table>
The below table lists some of the high-level business needs that WCO staff have identified for the Solution implementation that should be considered when responding to the RFP.

- All Areas – This label indicates that all areas of the solution apply: All Staff Intranet, Private Sites, and User Profiles.
- All Staff Intranet – This area includes the Intranet, or Organizational facing pages, that all WCO internal staff can access, including the Home Page, each Division/Department pages
- Private Sites – This includes all private team and project collaboration sites/sub-sites that only specified WCO staff can access.
- Other – These are business scenarios within WCO that do not fall specifically within the above categories

This is not an exhaustive list but a representation of what is required. This list will be refined during the discovery phase of the project (Phase 1: Enable the use of SharePoint Online).

<table>
<thead>
<tr>
<th>#</th>
<th>Area(s)</th>
<th>Business Scenario</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>All Areas</td>
<td>Governance &lt;ul&gt;&lt;li&gt;Establish governance for creating and maintaining the intranet, private sites, and user profiles.&lt;/li&gt;&lt;/ul&gt;</td>
</tr>
<tr>
<td>2</td>
<td>All Areas</td>
<td>Search &amp; Search Results &lt;ul&gt;&lt;li&gt;Search capabilities available to users from all intranet pages, user profiles, and private sites that users have access to.&lt;/li&gt;&lt;li&gt;Search results:&lt;ul&gt;&lt;li&gt;Search initiated from the Intranet Home to provide search results from across the Intranet sites and pages, user profiles, and private sites so that user has access to.&lt;/li&gt;&lt;li&gt;Search initiated from an Intranet Division, Department or sub-site or page and Private site to provide search results from that site.&lt;/li&gt;&lt;li&gt;Full file search for all natively supported content types including Office documents (Word, PowerPoint, Excel), PDFs, OneNote sections, content from SharePoint Sites (for example tasks and pages), images (for example jpg and png files), and videos stored in O365 Video portal.&lt;/li&gt;&lt;li&gt;Search for synonyms and key matches.&lt;/li&gt;&lt;/ul&gt;&lt;/li&gt;&lt;li&gt;Search Index &lt;ul&gt;&lt;li&gt;Establish an index of WCO custom metadata and key information.&lt;/li&gt;&lt;li&gt;Usable search results that combine out-of-box search results with WCO custom-indexed results with booleans such as “both” “or”, “and”.&lt;/li&gt;&lt;/ul&gt;&lt;/li&gt;&lt;li&gt;Implement faceted search&lt;/li&gt;&lt;li&gt;Search refinements including but not limited to faceted search navigation options to drill down by users, metadata, file types, timestamps…&lt;/li&gt;&lt;li&gt;Ability to index files that are linked from SharePoint&lt;/li&gt;&lt;li&gt;Reporting on search activities by intranet site, user profile, and/or SharePoint Sites, including what is being searched, number of searches conducted, timestamps of each search, and user actions from a search result.&lt;/li&gt;&lt;/ul&gt;</td>
</tr>
<tr>
<td></td>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>----------</td>
<td></td>
</tr>
</tbody>
</table>
| 3 | • Automatically apply site security to sub-sites and pages  
   • Sites reports: Access and usage  
   • Management of site security by site owners  
   • Regular reporting to sites owners with a list of users who have access and have specific privileges |

<table>
<thead>
<tr>
<th></th>
<th>Manage Sites / Sub-Sites</th>
</tr>
</thead>
</table>
| 4 | • Site owner capabilities to manage sites and/or sub-sites, including their creation  
   • Auditing and deletion procedures for sites and/or sub-sites  
   • Integration with the future HR system to pull data on new hires and recent retirees for an employee dashboard and any other HR data |

<table>
<thead>
<tr>
<th></th>
<th>Document Management</th>
</tr>
</thead>
</table>
| 5 | • Manage and co-author documents  
   • Version control  
   • Track the revision history of documents |

<table>
<thead>
<tr>
<th></th>
<th>Manage Headlines, News, and/or Announcements</th>
</tr>
</thead>
</table>
| 6 | • Manage the news and announcements displayed  
   • Select content from a Division/Department site to "feature" on a separate site or page (i.e. Home or Division)  
   • Display multiple rotating items  
   • Set automated notifications to end users of important headlines, news, or announcement |

<table>
<thead>
<tr>
<th></th>
<th>Calendars</th>
</tr>
</thead>
</table>
| 7 | • Display group outlook calendar(s) within a site or sub-site (i.e. Corporate Calendar)  
   • Send automated notifications to the group or a subset of the group  
   • Manage multiple calendars within a site or sub-site |

<table>
<thead>
<tr>
<th></th>
<th>Reporting</th>
</tr>
</thead>
</table>
| 8 | • Analytics of user access and usage of pages, links, and documents  
   • Full audit trail capabilities on user actions |

<table>
<thead>
<tr>
<th></th>
<th>Metadata</th>
</tr>
</thead>
</table>
| 9 | • Automatically apply metadata to files created/uploaded within a site  
   • Manually apply metadata to files created/uploaded within a site  
   • Define and create metadata to be applied  
   • Ability to add/apply metadata “en masse” (batch selection and application) would be “nice-to-have” for the larger volume areas of the site |

<table>
<thead>
<tr>
<th></th>
<th>Applications (i.e. Phone Directory, Weather)</th>
</tr>
</thead>
</table>
| 10 | • Manage applications to be displayed  
   • Imbed/Add Outlook group calendars and/or events  
   • Manage the view and data displayed |

<table>
<thead>
<tr>
<th></th>
<th>Whom to Contact / Help</th>
</tr>
</thead>
</table>
| 11 | • End users can easily identify and contact site owners  
   • End users can easily identify and contact Help and Support |

<table>
<thead>
<tr>
<th></th>
<th>Quick links</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>• Manage the quick links displayed</td>
</tr>
</tbody>
</table>
### Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting

- [www.wcoomd.org](http://www.wcoomd.org)

| 13 | **Notifications**  
|    | • Site Owners at the Intranet Home page to have the ability to send notifications/alerts  
|    | • Users have the ability to opt-in to notifications/alerts based on permission structure across the environment |  
| 14 | **Private Sites**  
|    | **Site Definition**  
|    | • Develop a standard site for all services/departments (we estimate 7 sites for services/departments)  
|    | • Train end-users to configure their site as per their needs  
|    | • Implement business process automation of defined WCO processes |  
| 15 | **Private Sites**  
|    | **Site for Project Management**  
|    | • Task management  
|    | • Enhance team collaboration  
|    | • Organize documents  
|    | • Clear progress updates and deadlines  
|    | • Understand finances for the project  
|    | • Project management features  
|    | • Logs management |  
| 16 | **Others**  
|    | **Information Technology Management**  
|    | • IT to execute fine-grain (single item) and complex restores without the use of PowerShell scripts or advanced technical support  
|    | • Backup/Restore process  
|    | • Storage management  
|    | • Performance management |  
| 17 | **Public Folder Migration**  
|    | • Migrate existing public folders to SharePoint Online |  
| 18 | **Data Source and Third-parties integrations (see chapter 1.7 for more information)**  
|    | • Business Applications (To agree on which ones during Phase 1) |  
| 19 | **Records Retention**  
|    | • Identify records retention needs and requirements |  

### 1.7 Third-parties integrations

The proposed solution will need to be integrated with the following third parties (the list is non-exhaustive):

- The outlook component of M365  
  - Booking of meeting rooms (each meeting has an email address)  
  - View the availabilities of meeting rooms  
  - WCO’s events
1.8 Requirements for the UX / UI phase of the Intranet

The selected supplier will develop screens for the future Intranet. The WCO expects the following (the list is non-exhaustive and future templates may be required after the analysis phase).....:

- Responsive design for desktop screens, tablets and smartphone
- The WCO is a bilingual organization: English and French
- As templates for UX / UI for the Intranet
  - Homepage
  - This may include What’s news, calendar, link to external applications, the start of approval workflows, request for e-signature, etc.
  - Search engine with facet search
  - Organization’s calendar
  - Information page for newcomers to the Organization
  - Information page for legal rules
  - Template of pages to follow
  - See who’s who within the Organization

We expect around a dozen templates of pages for 3 sites / sub-sites
  - Intranet
  - Sub-site for various WCO’s departments/directorates
  - Sub-site for Project Management

1.9 OPTION 1 – Contract Management

1.9.0 Introduction

The supplier needs to quote and provide an answer to this option. The contracting authority has the liberty to select this option after analysis of the quote and, potentially, a demo of the proposed solution by the supplier.

The selected Contract Management solution must allow the WCO to achieve the following business objectives:

- Consolidate all contract’s essential information into one SharePoint site. Even though, contracts and their annexes can be stored in various locations.
- Allow vision by dashboards to facilitate the general view of all existing contracts in force or previously in-force contracts of the WCO
- Establish when contracts will be over and ensure the appropriate notification (X days before contract end-date) to the persons in charge
- Full 360° oversight over all the documents and information relating to a contract
- The provision of draft contract documents and templates to suppliers and internal stakeholders
- Integration into MS Outlook to store contract-related emails
- Provide templates for contract management
- Provide templates for contracts
- Support the work of employees by using M365 tools (for ex. Microsoft Syntax to identify automatically key metadata)
- Automate the workflow (request approval of the contract, reject, notify for processed payments, etc.)
- Approve and reject contracts
- E-sign documents (contract, quotes, letters, etc.) when and where needed from the template
- Providing specific numbering systems to official letters and contracts depending on the authors
- Provide Parent-child hierarchy (Framework agreements, can have several contracts that can have several annexes, extensions, etc.)
- Each contract needs to have status depending on the level of approbation or depending on their lifetime.

The estimated number of contracts exceeds 1.000 including the Human Resources contracts.

1.9.1 Functional requirements

The list underneath is non-exhaustive and will be complemented during the analysis phase

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Usability</td>
<td>Provide templates for contract</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-1</td>
<td>Provide templates for contract</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-2</td>
<td>Provide the Contract Management System as mentioned above and the essential dependencies</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-3</td>
<td>Connect with the e-signing feature to push contracts and documents for final approval</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-4</td>
<td>Centralize documents during the negotiation phase</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-5</td>
<td>Centralize documents during the negotiation phase</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-6</td>
<td>Provide dashboards with granular access (review data from all contracts stored in a glance, with dashboards to present essential data on contracts)</td>
<td>Nice-to-have</td>
</tr>
<tr>
<td>US-7</td>
<td>In dashboards, the list of contracts can be filtered based on key metadata (type of contract, end-date, status of the contract, status of the approval, name of the project, value of the contract, etc.)</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-8</td>
<td>Possibility to search within the list of contracts</td>
<td>Must-have</td>
</tr>
<tr>
<td>US-9</td>
<td>Allow contract co-authoring</td>
<td>Must-have</td>
</tr>
</tbody>
</table>
### Call for tenders for the SharePoint Implementation, Planning, Development, and Project Consulting

#### Intelligence

| US-10 | Contracts can have several sub-documents including other contracts, annexes, | Must-have |
| US-11 | Allow links or documents to be sent with attachments/annexes | Must-have |
| US-12 | Allow links for documents to be reviewed by external users | Must-have |
| US-13 | Contracts need to be associated with various retention policies | Nice-to-have |
| US-14 | Associate Outlook documents to a contract (emails) | Nice-to-have |
| INT-1 | Provide automated reporting - compile contract data at the level of the Organization - identify how much is being spent on each WCO's supplier - ... | Must-have |
| INT-2 | Possibility to add its own dashboards | Must-have |
| INT-3 | Use a system such as SharePoint Syntax to facilitate the automatic completion of metadata | Must-have |
| INT-4 | Provide workflows for approval and revision of documents | Must-have |
| INT-5 | Workflows are different depending on the value of each contract and according to the project | Must-have |
| INT-6 | Send emails to all responsible persons at defined timeframe | Must-have |

#### Access

| ACC-1 | Ensure granular access controls (enhanced control over who can access, edit, approve and sign which contracts) | Must-have |
| ACC-2 | Ensure granular indexing and retrieval of information (ex. Employees’ contracts and other HR contracts should be excluded) | Must-have |

#### Security

| SEC-1 | Utilize and comply with all industry best practices and standard network protocols. | Must-have |
| SEC-2 | Provides compartmentalized and role-based access approval workflows. | Must-have |
| SEC-3 | The selected supplier must ensure that data and records are always protected from unauthorized access. This will include the supplier’s staff that may have access to systems that store or transport college data or WCO’s employees that should not have access to specific signing. | Must-have |
| SEC-4 | The solution must be maintained with security updates and upgrades (depending on the license conditions). Major upgrades should be at the discretion of the WCO. | Must-have |

#### Pricing

| PRICE-1 | The license will cover the whole solution and won’t be a price for a license per e-signature or frequency of usage. | Must-have |
| PRICE-2 | Transaction-based pricing will not be accepted by the WCO | Must-have |
1.10 OPTION 2 – Data Classification

1.10.1 Introduction

The supplier needs to quote and provide an answer to this option. The WCO has the liberty to select this option after analysis of the quote and, potentially, a demo of the proposed solution by the supplier.

With this sub-project, WCO wishes to ensure the appropriate level of classification of documents and ensure that selected documents are appropriately protected. The use of classification includes the following:

- The WCO performs countless transactions with others for which data classification and protection are relevant, and the lack of industry standards impairs Organizations’ ability to enforce data handling requirements.
- Documents are everywhere: on devices (e.g., laptops, desktops, mobile devices), in applications running in both on-premises and outsourced environments, and in the cloud. This distributed nature of data complicates the process of establishing and maintaining data inventories.
- Data classifications and data handling requirements often change during the lifecycle of a document, for example safeguarding the confidentiality of a document at first, then subsequently releasing it to the public. Another example is a document being safeguarded and retained for a certain period, then being destroyed to prevent further access.

This project is intended to address these challenges and to enable the WCO to launch and maintain a solution for defining and communicating data classifications, labels, and document handling rulesets.

If the supplier considers another solution to better match WCO’s requirements, the supplier needs to include the description of the proposed solutions in the technical offer and to mention potential extra costs (licenses or others) in the financial offering.

1.10.2 Functional requirements

The list underneath is non-exhaustive and will be complemented during the analysis phase.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLAS-1</td>
<td>Possibility to determine Label for each level of products</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-2</td>
<td>Depending on the level of classification, each workable product (word, excel, PowerPoint, etc.) needs to be with a watermark when sent outside the Organization</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-3</td>
<td>Depending on the level of classification, the workable document (Word, Excel, PowerPoint, etc.) will be not authorized for modifications for various groups of people (that can be internal or external from WCO)</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-4</td>
<td>Depending on the level of classification, the workable document (Word, Excel, PowerPoint, etc.) will be not visible for modifications for various groups of people (that can be internal or external from WCO)</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-5</td>
<td>The system allows the automatic notification of the owner when the document is modified or sent</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-6</td>
<td>Implementation of the DLP Policies</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-7</td>
<td>The system allows the automatic notification of the owner when files are sent outside the Organization</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-8</td>
<td>The system allows the blocking of users from sending files outside the Organization</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-9</td>
<td>The system allows different watermarks on documents depending on the level of classification</td>
<td>Must-have</td>
</tr>
<tr>
<td>CLAS-10</td>
<td>Possibility to limit documents to read-only</td>
<td>Must-have</td>
</tr>
</tbody>
</table>
2 Proposal

2.1 Bidders Proposal

2.1.1 Process

All proposals will be examined by the following process:

Step 1: Confirmation of Compliance with the Mandatory Requirements

Technical Offers will be reviewed for compliance with the Mandatory Requirements described in Annex “IV” (Technical Offer Requirements and Evaluation) of the RFP to confirm that the information, statements, and supporting material in the bidder’s Technical Offer substantiate a compliant response. Subject to WCO’s reserved rights, Mandatory Requirements will be confirmed on a simple pass-or-fail basis and Technical Offers that do not comply with any Mandatory Requirement will be considered non-compliant and will receive no further consideration.

Step 2: Evaluation of Rated Requirements (100 points) (65%)

Technical Offers will be evaluated against the Rated Requirements, as outlined in Annex IV (Technical Offer Requirements and Evaluation). Technical Offers will be assigned a score for each rated requirement to establish a Step 2 “Technical Score”. The maximum Technical Score is 100 points. At the end of this Step 2 (Evaluation of Rated Requirements), WCO will establish a shortlist of the top two (2) bidders that achieve a Technical Score of at least 70 points out of the 100 total points available.

Step 3: Financial Evaluation Offer (35%)

Financial Offers will be evaluated and assigned an “Evaluated Price” in accordance with Annex I (“Financial Offer Requirements and Evaluation”). The supplier needs to integrate the consulting costs per unit of time for the team. This cost will be calculated for the Change Requests and will be valid during the duration of the project.

Step 4: Presentation (if necessary, 20 extra points)

If necessary and depending on the previous results, selected bidders will be required to make a presentation which will be assigned a score for each presentation-rated requirement as outlined in Annex V (“Presentation Requirements and Evaluation”). This presentation will be scheduled following the Evaluation of Rated Requirements. Any costs incurred by the bidder for preparation and attendance in respect of the presentation to WCO shall be at the bidder’s expense and not reimbursed by WCO.
2.2 Project management

2.2.1 Work Location
The project location is WCO’s main site in Brussels. The Supplier may assume that the WCO will allow resources to work remotely using MS Teams, provided it does not impact negatively working together with the ISTS Services Team and our end-users.

If a project resource (WCO or Supplier) experiences any disruption or degradation of services, e.g., power failures or internet downtime that impact on delivery, the resource shall plan accordingly where possible and make the necessary arrangements to work at the WCO’s main site.

The WCO reserves the right to at any time require the Supplier to work at the WCO’s main site in Brussels and to do so for any length of time.

2.2.2 Guarantee
The selected suppliers must warrant for a period of at least 6 (six) months following the final reception of the deliverables that each deliverable conforms in all material respects to the specifications that are outlined in the concerned statement of work. The selected supplier must guarantee to correct, promptly and free of charge, for at least 6 (six) months, all problems (bugs/errors in configuration) making it impossible to use all, or some, of the functionality (guarantee period).

2.2.3 Experience of the supplier
The supplier should have experience working on similar projects related to SharePoint implementation/migration and creation of Intranet in the past three (3) years, in particular, working for medium to large companies or Organizations.

The supplier should have specific experience in operation in the IT sector for a minimum of five (5) years.

The supplier should demonstrate its capacity to mobilize teams on an ad-hoc basis and deliver the products ordered in a timely manner.

2.3 Team composition and qualification requirements for key experts
The supplier must demonstrate that an appropriate multi-disciplinary team is in place to deliver on the above-noted terms of reference.

The supplier should propose an account/project manager in charge of the relations with the WCO for the duration of the contract. This person should be backed up by a second dedicated member of staff. This person shall not be replaced without the WCO’s prior written agreement. Should this person no longer work for the selected supplier during the duration of the contract, the selected supplier should ensure that all necessary steps in terms of knowledge transmission and a smooth transition are taken.
The minimum requirements in terms of competence for the account/project manager and the leadership teams and their backups are stated below.

WCO will assign an internal project manager who will be responsible for the overall project management of this process. The WCO designated individual, in consultation with the selected bidder Project Manager(s), will provide the oversight to ensure the successful implementation of the system. This will include the necessary scheduling of WCO resources to ensure their availability at the appropriate time throughout the duration of the project.

For any modifications in the team at the beginning or during the project, the CV of the new proposed member of the team must be validated by the WCO.

2.4 Financial Offer

The prices should be indicated and detailed following the format provided in Annex I “Template for Financial Offers”. The WCO will not consider a financial offer provided in another format. All costs and possible rebates should be taken into account in the prices mentioned in the provided format.
3 Procedures for Answering the Call for Tender and Content of the Tender

3.1 Preparation of the tender

The tender shall comprise two (2) separate parts: one part meeting the technical criteria, and the other indicating the price of the service requested. The part concerning the price should be provided in a separate envelope.

The tender submitted by the supplier should comprise all the information requested in the Annex I (Financial offer), Annex IV (Technical Offer Requirements and Evaluation) hereto as well as the information and documents requested hereunder.

Tenders must be made without reservation. In fact, reservation clauses constitute a lack of undertaking. However, a supplier may note in its tender that certain aspects require clarity. It is legitimate for a supplier to point these out, and equally legitimate for the WCO to take account of them, provided that these corrections do not substantially affect the terms of the tendering process or the purpose of the contract.

Tenders must be compliant, in all respects, with the purpose of the call for tender.

Tenders that are not compliant with the purpose of the call for tender shall be set aside.

Documentation required for the tender

All tender proposals must be accompanied by the following documents:

a) Administrative documents:

A sheet describing the supplier’s professional activities.

- VAT No. or VAT exemption certificate.
- A document attesting to the supplier’s legal status.
- A document listing the names and status of the individuals who make up the supplier’s governing bodies, together with an organization chart of the company.
- Documentary evidence of the supplier’s financial situation (balance sheet, profit, and loss account).
- A declaration on honour vouching that the supplier is not in one of the situations described in part 3.1 related to the Exclusion criteria and Ethics clauses below. Please note that the WCO reserves the right to request evidence issued by competent national authorities to support such declaration.

b) Information document on the supplier’s expertise:

Please refer to Annex IV for the required information.

Further information related to the Selection criteria of the supplier is outlined in part 3.3.
3.2 Costs of tender response

The supplier shall bear all costs associated with the preparation and submission of the tender response. Under no circumstances shall the WCO be responsible or liable to the supplier, regardless of the outcome of the call for tender.

3.3 Period of validity of the tender

All tender responses made by the supplier shall remain valid for ninety (90) days after the deadline for receipt of tenders.

Any tender response with a period of validity of less than ninety (90) days shall automatically be rejected.

3.4 Formalities and signing of tenders

The tender should be sent to:

WCO-OMD
WCO CALL FOR TENDER – DMS / SP project
For the attention of Procurement Service
Rue du Marché, 30
B-1210 – Brussels
Belgium

The supplier shall provide one copy of the tender response, clearly marking it as:

“Original tender response”

The tender shall be typed and signed by the supplier or any other person authorized to bind the supplier.

The tender shall contain no erasures, overwriting, or correction, as these, shall entail rejection of the tender.

The tender may be submitted solely by post or delivered by hand to the WCO reception.

3.5 Date of submission of tenders

The WCO Procurement Service may, at its own discretion, extend the deadline for the submission of tender responses. Suppliers contacted by the Service shall be notified directly, in writing, of this extension.

3.6 Prices quoted in tenders

The financial proposal must be duly dated and signed by a duly authorized representative of the supplier. The financial proposal shall be based on the template in Annex I.
The supplier must complete the “Financial offer” table as outlined in Annex I. Prices must be quoted in euros. For suppliers from countries that do not form part of the eurozone, the amount of the tender cannot be revised as a result of exchange rate fluctuations. The choice of exchange rate falls to the supplier, who bears the risks and reaps the benefits associated with these fluctuations.

For intra-Community transactions (EU) as well as domestic transactions (Belgium), the supply of services to the WCO is VAT-exempted.¹

3.7 Language

All responses to this call for tender must be written in either English or French (the WCO’s two official languages).

3.8 Requests for information or clarification of the call for tender

A supplier requiring additional information on the call for tender may submit a request in writing to the WCO Procurement Service with the email address mentioned below:

procurement@wcoomd.org

The WCO Procurement Service shall respond in writing to any request it receives no later than 5 days before the deadline for submission of tenders. Copies of the replies shall be sent to all the candidates having received the call for tender.

These questions and answers shall also be posted on the WCO website, in the Calls for Tender section, in an FAQ (frequently asked questions) sub-chapter under the name of the call for tender concerned.

3.9 Modification and withdrawal of the call for tender

At its sole discretion and without any requirement for justification, the WCO may amend the call for tender before the deadline for submission of tenders.

All the potential suppliers to whom the WCO has directly sent the call for tender shall receive written notification of the changes.

To enable the suppliers to take account of these changes in their response, the Procurement Service may, upon its initiative, extend the deadline for submission of tenders.

¹ Please see article 1.4 of the “Standard Terms and Conditions for the Provision of Goods and/or Services to the WCO, as annexed hereto (Annex III).
The WCO retains the right to withdraw this call for tender without any requirement for justification. No claims for damages of any kind whatsoever may be made to the WCO following the withdrawal.

3.10 Modification and withdrawal of the tender

The supplier may withdraw its tender by sending written notice of withdrawal to the WCO Procurement Service before the deadline for receipt of tenders as indicated in the call for tender.

The withdrawal notice must be sent by registered mail with an acknowledgment of receipt.

No tender may be modified subsequent to the deadline for submission indicated in the call for tender.

No tender may be withdrawn in the interval between the deadline for submission of tenders and the period of validity of the tender.

3.11 Subcontracting

Subcontracting is permitted subject to the following conditions:

- The selected supplier is fully responsible for the performance of any subcontractor.
- The management of the project and the pedagogical engineering phase cannot be subcontracted.
- Suppliers must indicate in their tenders the amount of the contract (if any) that they intend to subcontract to third parties, as well as the identity and availability of the potential subcontractor(s).
- The suppliers must not subcontract to third parties not identified in the tender as potential subcontractors without prior written authorization from the WCO.
- The suppliers shall not cause the contract to be performed in fact by third parties.
- Even where the WCO authorizes the suppliers to subcontract to third parties, the suppliers shall nonetheless remain bound by their obligations to the WCO under the contract.
- The suppliers shall ensure that the subcontract does not affect the rights and guarantees to which the WCO is entitled by virtue of the contract.

Where subcontracting is envisaged, evidence of the potential subcontractors’ ability to perform the tasks entrusted to them shall be included in the tender. Such evidence is the same as that also required from the suppliers, as indicated below.

Suppliers should note that the WCO shall consider intended subcontracting as an indication that the potential suppliers are not having the requisite resources to complete the tasks under the contract. Therefore, this point shall be taken into account in the assessment of the “project management” award criterion.
4. Assessment and Award of Contract

4.1 Exclusion Criteria

Applicants or suppliers shall be excluded from a contract if:

(a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations.

(b) they have been convicted of an offence concerning their professional conduct (including misrepresentation) by a judgment which has the force of res judicata.

(c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify.

(d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed.

(e) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization, money laundering or terrorist financing, terrorist offences or offences linked to terrorist activities, child labour and other trafficking in human beings, irregularity, creating or being a shell company or any other illegal activity detrimental to the WCO’s financial interests.

Suppliers must declare on their honor that they are not in one of the situations referred to above. The WCO reserves the right to request evidence issued by competent national authorities to support such declaration.

4.2 Ethics clauses

Any attempt by a supplier to obtain confidential information, enter into unlawful agreements with competitors, or influence the Advisory Committee on Contracts (ACC) or any WCO staff member during the process of examining, clarifying, evaluating, and comparing tenders and applications will lead to the rejection of its submission or tender.

Thus, any direct or indirect contact with a WCO staff member other than the person named in this call for tender may, at the WCO’s sole discretion, result in the rejection of the tender without any compensation or formality.

When putting forward a tender, the supplier shall declare that it is affected by no potential conflict of interest and has no equivalent relation in that respect with other suppliers or parties involved in the missions likely to be outsourced to it in its capacity as the selected supplier. Should such a
situation arise during the execution of the contract, the supplier must immediately inform the WCO.

Suppliers shall respect core labour standards as defined in the relevant International Labour Organization (ILO) conventions (such as the Conventions on freedom of association and collective bargaining, abolition of forced and compulsory labour, abolition of discrimination in the workplace, and the abolition of child labour).

The supplier shall refrain from any relationship likely to compromise its independence or that of its staff. If the supplier cease to be independent, the WCO may, regardless of injury, terminate the contract without further notice and without the supplier having any claim to compensation.

The WCO reserves the right to suspend or cancel the call for tender or the contract awarded if corrupt practices of any kind are discovered at any stage of the award process.

4.3 Selection criteria

Only those tenders fulfilling all the selection criteria shall be assessed against the award criteria.

The selection criteria are:
- Submission of documents listed (see part 2.1);
- Submission of information related to the supplier’s expertise and the experience of each of the involved staff members (see parts 2.1; 4.4, and Annex IV);
- Provision of a proposal that meets the requirements set out in the specifications and testifies to the supplier’s ability to provide the services requested, (see parts 2.1, 4.4, and Annex IV)
- Submission of a financial proposal (see Annex I)

4.4 Award criteria

Further to the price quoted for the performance of the contract, the following award criteria shall be applied and should be taken into account in the preparation of the technical proposal corresponding to the specific qualifications outlined in part 1. The mandatory requirements and award criteria are listed and detailed in Annex IV.

Award criterion 1 – Organizational Functional and Technical Experience

This criterion serves to assess the supplier’s expertise in providing services as described in this RFP. This criterion serves to assess the supplier’s ability to understand the WCO’s needs and deliver the tasks listed under this call for tender, according to the requirements specified herein.

See Annex IV for more information.

Award criterion 2 – Understanding and Approach

This criterion serves to assess the supplier’s understanding of the WCO’s requirements and its objectives as described in the RFP.
Award criterion 3 – Project Team

This criterion serves to assess the experience of the proposed Project Manager and functional team in terms of University qualification, professional experience of leading similar projects in the past including WCO experience, and experience in oversight and quality control of similar projects. The following information will need to be provided by the supplier in order to assess this criterion:

Award criterion 4 – Microsoft Partner

This criterion serves to understand the supplier’s experience and competencies with SharePoint online implementations.

4.5 Points

A scoring system to evaluate the award criteria relating to the technical merits of the tender shall be applied. Points will be applied as follows:

<table>
<thead>
<tr>
<th>Tender Award Criteria</th>
<th>Maximum Points</th>
<th>Minimum Passing Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award criterion 1</td>
<td>50</td>
<td>35</td>
</tr>
<tr>
<td>Award criterion 2</td>
<td>30</td>
<td>22</td>
</tr>
<tr>
<td>Award criterion 3</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>Award criterion 4</td>
<td>5</td>
<td>3</td>
</tr>
</tbody>
</table>

**TOTAL** | **100** | **70**

Technical sufficiency levels: to be selected, companies shall have an overall score of 70 points or more.

4.6 Project proposal

The offer provided by the supplier will be examined from a technical perspective. Suppliers are requested to provide the information as requested in this call for tender and according to the instructions and templates provided. The WCO will assess the offer from a technical perspective and will make sure that all requirements have been met.

The WCO reserves the right to reject an offer in case some requirements are missing or should if it estimates that too many requirements are not fully met.

4.7 Financial proposal

The WCO Advisory Committee on Contracts shall then proceed with the financial classification of the tenders retained.

100 points in the evaluation of financial proposals will be awarded to the lowest-priced tender and points will be awarded to the other tenders in direct proportion to their relationship with the lowest priced tender.
The WCO will award contracts to the tenders offering the best value for money using a 65%/35% technical/financial point allocation. The technical bid will be assigned a technical score out of a maximum of 65 marks. The financial bid will be assigned a financial score out of a maximum of 35 marks.

If necessary and depending on the results of step 2, two (2) bidders on the shortlist will be required to make a presentation which will be assigned a score for each presentation-rated requirement as outlined in Annex “V” (Presentation Requirements and Evaluation) to establish a Step 3 “Presentation Score”. This presentation will be scheduled following the Evaluation of Rated Requirements. Any costs incurred by the bidder for preparation and attendance in respect of the presentation to WCO shall be at the bidder’s expense and not reimbursed by WCO.

The price quoted must be a firm, non-revisable price and must be denominated in euros, as per Annex I. Prices quoted must include all government taxes, customs duties, and levies, unless the supplier is established and registered in Belgium or the European Union, in which case the price would be exclusive of VAT.²

4.8 Award of the contract

The contract shall be awarded to the supplier offering the best value for money.

The WCO reserves the right not to select any tender if the amounts tendered to exceed the budget envisaged for this project. Where applicable, the WCO may ask the supplier to provide clarification about a tender. This request, as well as the response, shall be in writing. The WCO reserves the right to ask an applicant for an additional interview/demonstration; in particular where it is difficult to judge which of several firms represents the best value for money. The cost of the interview/demonstration shall be borne by the supplier. The WCO reserves the right to ask suppliers for their best and final offer before awarding the contract. Each supplier shall be informed about the decision by the Advisory Committee on Contracts.

4.9 No obligation to award a contract

In no way whatsoever does the call for tender procedure entail any obligation on the WCO’s part to award one or more contracts. Up until the signature of the contract, the WCO may decide not to perform the contract or may cancel the call for tender procedure, without the suppliers’ being able to claim compensation of any kind.

The WCO is not liable for any compensation with respect to suppliers’ whose tenders have not been accepted. Nor shall it be liable should it decide not to award the contract.

In any event, the WCO retains the right to withdraw the call for tender or to reject all the tenders before a contract has been awarded and signed, without having to provide any justification or having to compensate the suppliers for any damage whatsoever.

² Please see article 1.4 of the ‘Standard Terms and Conditions for the Provision of Goods and/or Services to the WCO, as annexed hereto (Annex III).
The WCO reserves the right to contract in full or partly the services described in this call for tender without having to provide any justification or having to compensate the suppliers for any damage whatsoever.

4.10 Special provisions

Nothing in this call for tender and the annexes thereto, including in particular any references to Belgian legislation, shall be construed as a waiver by the WCO of its privileges or those of its officials.

Given that the WCO is an intergovernmental Organization, it is expressly agreed that the rights and obligations of the Parties shall be governed by the call for tender or, subsidiarity, by the provisions of Belgian law. It is expressly stated that the constituent parts of the call for tender shall take precedence over the legislative and regulatory provisions referred to therein.

4.11 Request for information – complaints

Unsuccessful suppliers may seek clarification, from the official responsible for purchases, of the reasons why they were not awarded the contract.

Requests for information or complaints must be lodged according to Annex 6, point 7 of the WCO Financial Rules as (see Annex II hereto).

4.12 Acceptance of the conditions of the call for tender and provisions applicable to the agreement

The suppliers acknowledge that providing a proposal implies full acceptance of (i) the conditions set out in this call for tender and (ii) the essential and non-negotiable terms and conditions of the WCO which will apply to the agreement that will be negotiated following the award of the contract (as annexed hereto in Annex III “Standard Terms and Conditions for the Provision of Goods and/or Services to the WCO”).

4.13 Payment Scheme

The following payment scheme will be applied to the awarded contract:

1. Thirty (30) percent of the total amount of the fixed price part upon signature of the agreement;
2. Twenty-five (25) percent when the first half the WCO’s departments/services are migrated;
3. Twenty-five (25) percent when the second half the WCO's departments/services are migrated;
4. Fifteen (15) percent of the total amount of the fixed price upon finalization of the project;
5. Fifteen (5) percent of the total amount of the fixed price six months after the point above.

Upon agreement on the scope of the Change Requests (CR), the selected supplier will quote. The work can start only after the signature of the Project Manager (PM). 50% will be paid at the signing of the PM and 50% when the CR is accepted.
All payments are due within thirty (30) calendar days of receipt of the invoice.
ANNEXES

Annex I: Template for Financial Offers
Annex II: WCO Financial Rules (Annex 6 – Procedure and principles for the acquisition of goods and services)
Annex III: Standard Terms and Conditions for the Provision of Goods and/or Services to the WCO
Annex IV: Technical Offer Requirements and Evaluation
Annex V: Presentation Requirements and Evaluation