**COMMON MARKET FOR EASTERN AND**

 **SOUTHERN AFRICA**



**SELECTION OF CONSULTANCY FIRMS**

**Request for Proposals (Firms)**

**REFERENCE NUMBER:** **CS/IT/09-10-24/PM**

**REQUEST FOR SERVICES TITLE:** **HIRE OF A CONSULTANCY FIRM TO DESIGN, DEVELOP AND IMPLEMENT A NEW FIXED ASSET TRACKING SYSTEM.**

**Issued on: October 9, 2024**

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

Head of Procurement,

COMESA Secretariat

Ben Bella Road, P.O. Box 30051,

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

COMMON MARKET FOR EASTERN AND

**SOUTHERN AFRICA**



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**P O Box 30051**

**LUSAKA 10101**

**Zambia**

**OFFICE OF THE SECRETARY GENERAL**

**Ref:** **CS/IT/9-10-24/PM**. **October 9, 2024**

**Letter of Invitation (LoI)**

1. ***COMESA*** is inviting consultancy firms to submit technical and financial proposals for the following services***:*** ***Design, Development, and Implementation of a new Fixed Asset Tracking System to be procured under the Contract reference number CS/IT/23-09-24/PM.*** *In case of a Joint Venture (JV), a full name of the JV and the names of each member as in the submitted Expression of Interest shall be used]*
2. ***This*** Request for Proposals (RFP)/ Request for Consultancy Services (RFCS) has been addressed to the following shortlisted Consultants: N/A*. If a Consultant is a Joint Venture (JV), the full name of the JV, as in the Expression of Interest, shall be used. In addition, list all members, starting with the name of the lead member. Where sub-consultants have been proposed, they shall be named.*
3. The Terms of Reference defining the minimum technical requirements for these services are attached as Annex 1 to this RFCS.
4. You are required to submit both your technical and financial proposals at the same time but in different folders/attachments. The Financial proposal should be in pdf format and secured with a password to be provided upon request.
5. Your proposal must be presented as per Standard Proposal Forms attached as Annex 2 to this RFP in English language and be accompanied by copies of all the indicated supporting documents. If the supporting documents are not in English, these shall be accompanied by a certified translation into English.
6. Your proposal should be addressed to the **Head of Procurement** **COMESA Secretariat, PO Box 30051 Lusaka, Zambia** and submitted to: ***tenders@comesa.int*** ***and copy*** ***procurement@comesa.int***

Physical submission of applications is NOT allowed.

1. The deadline for submission of your proposal, to the address indicated in Paragraph 6 is: **31st October 2024*.***
2. Proposal must be submitted as in 6 above.
3. It is not permissible to transfer this invitation to any other firm.
4. The Technical Proposal will be evaluated against the following criteria.

|  |  |
| --- | --- |
| **Criteria**  | **Maximum points allocated** |
| Vendors should have at least three (3) reference sites where they have successfully implemented a similar project in the previous two (2) years. (Attach copies of contracts as evidence) | ***[15 points]*** |
| The firms proposed methodology and workplan | ***[25 points]*** |
| ***Qualification of Experts*** | ***[60 Points]*** |
|  | ***Out of which:***  |  |
|  | Key expert 1 (Project Manager) | *[20 points]* |
|  | Key expert 2 (Solution Architect) | *[17 points]* |
|  | Key expert 3 (Functional Expert) | *[13 points]* |
|  | Key expert 4 (Technical Expert) | *[10 points]* |
| **Total**  | **100 points** |

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

|  |  |
| --- | --- |
| **Sub-criteria**  | **Percentage from Total Number of Points Allocated to the Criteria** |
|  (i) General Qualifications | ***[minimum 20% –maximum 30%]*** |
| (ii) Adequacy for the Project | ***[minimum 40% –maximum 60%]*** |
| (iii) Experience in Region | ***[minimum 10% –maximum 20%]*** |
| **Total**  | **100 %** |

1. Your proposal should be submitted as per the following instructions, and in accordance with the Terms and Conditions of the Standard Contract attached as Annex 4 to this RFCS:

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

(ii) EVALUATION AND AWARD OF CONTRACT: Proposals determined to be administrative and technical compliant to the requirement will be evaluated by comparison of their prices. A proposal is considered compliant to the requirements if: fulfils the formal requirements (see Paragraphs 2,3,4,5,6,7and 8 above), has received minimum 70 points for the technical proposal, and the financial proposal does not exceed the maximum available budget for the Contract. The award will be made to the bidder offering the lowest total price among the administrative and technical compliant proposals.

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

1. The assignment is expected to commence within 3 weeks from the date of signature of the Contract.
2. Additional request for information and clarifications can be requested, no later than 7 calendar days prior to the deadline indicated in the paragraph 7 above, from:

The Procuring entity: **COMESA Secretariat**

 Contact person: **Patrick Masamba**

E-mail: PMasamba***@comesa.int******;*** ***procurement@comesa.int******;***

The answers on the questions received will be posted on the COMESA Secretariat’s website at the latest 3 working days before the deadline for submission of applications.

**ANNEXES:**

ANNEX 1: Terms of Reference

ANNEX 2: Technical Proposal Submission Forms

ANNEX 3: Financial Proposal Submission Forms

ANNEX 4: Standard Contract/Terms and Conditions

Sincerely,

Name: Silver Mwesigwa

Title: Head of Procurement

Date: 09th October 2024

**ANNEX 1: Terms of Reference**



**TERMS OF REFERENCE FOR THE FIXED ASSETS TRACKING SYSTEM**

**October 2024**

**Background**

The Common Market for Eastern and Southern Africa (COMESA) is a regional grouping of 21 African States which have agreed to promote regional integration through trade development and transport facilitation. COMESA's objectives include sustainable economic development through economic and social progress in all Member States through increased co-operation and integration in all fields of development particularly in Trade, Customs and Monetary Affairs, Transport, Communication and Information Technology, Industry and Agriculture, Energy, Environment and Natural Resources including Gender and Social Development. The Secretariat is based in Lusaka, Zambia.

The COMESA Secretariat conducts an annual physical count of its fixed assets. Asset tracking plays a vital role in enabling COMESA to efficiently manage its fixed assets, maintain regulatory compliance, optimize operations, mitigate risks, and make well-informed strategic decisions. It serves as the cornerstone for implementing efficient and transparent asset management practices. However, the manual nature of the current system necessitates considerable time and effort. Additionally, reliance on manual methods increases the risk of errors, limits real-time visibility, and poses challenges in scaling with organizational growth.

Consequently, COMESA aims to procure a Fixed Asset Tracking system to digitize the existing manual process for fixed asset count.

The introduction of a new Fixed Asset Tracking system at COMESA is anticipated to address the following key areas:

* **Process Automation:** The system should automate manual processes to enhance effectiveness and efficiency in asset management.
* **Accessibility:** Staff members should have the ability to access the fixed asset tracking system anytime and from anywhere, facilitating seamless monitoring and management.
* **Integration:** The output of the application must seamlessly integrate with current and future relevant application systems within COMESA to ensure data consistency and interoperability.
* **Data Integrity and Security:** Enhanced measures for data integrity and security should be implemented, including proper access controls and other electronic safeguards to protect sensitive asset information.
* **Scalability:** The system should be flexible and scalable, allowing for the addition of new features or modules to adapt to evolving organizational needs and growth.
* **Reporting Capabilities:** The current manual system may not adequately address all stakeholders' reporting requirements. The new system should provide comprehensive reporting functionality to meet the diverse reporting needs of stakeholders within COMESA.

Overall, the implementation of a new Fixed Asset Tracking system is expected to streamline processes, improve accessibility, ensure data integrity and security, support scalability, and enhance reporting capabilities within COMESA.

**Objectives of the System**

The main objectives of the system are:

* Efficient Asset Management: The system aims to streamline the management of fixed assets by providing accurate and up-to-date information on asset location, (condition- this keeps changing), and status.
* Regulatory Compliance: Ensuring compliance with regulatory requirements related to asset management, depreciation, reporting, and auditing.
* Optimized Asset Utilization: Maximizing the utilization of fixed assets by tracking their usage patterns, identifying underutilized assets, and reallocating resources accordingly. – how will this be done
* Risk Mitigation: Minimizing the risk of asset loss, theft, damage, or obsolescence through improved tracking, security measures, and maintenance scheduling.
* Financial Management: Facilitating accurate financial reporting, budgeting, and decision-making by tracking asset values, depreciation, (maintenance costs, and lifecycle expenses – how will this be done).
* Enhanced Productivity: Reducing manual efforts and time spent on asset tracking and management tasks, allowing employees to focus on more strategic activities.
* Improved Decision-making: Providing comprehensive data and insights on asset performance, maintenance needs, and lifecycle costs to support informed decision-making at all levels of the organization. – how will this be done
* Transparency and Accountability: Promoting transparency and accountability in asset management practices by maintaining accurate records, audit trails, and documentation.
* Integration: Integrating with other organizational systems and processes to ensure seamless data flow, interoperability, and consistency across different departments and functions.

**Scope of Work**

The scope of work of the project is as follows:

* **Design, Development, and Implementation of a new Fixed Asset Tracking System:** The supplier is expected to design, develop, and implement a comprehensive suite of tools for the management of fixed asset tracking activities, including reporting functionalities.
* **Integration:** The application should be fully integrated with the Sun Accounting System, E-Procurement system, Document Management System, workflow management system any future application systems developed by COMESA.
* **Migration of Data:** The vendor should provide an effective and efficient data migration approach of all existing data from the current manual system to the configured environment. The successful vendor will be expected to provide full support to the COMESA during the data migration phases, including the identification and resolution of data quality issues. – data is in the accounting system
* **Training & Knowledge Transfer:** The vendor shall provide a detailed training and change management plan to ensure proper knowledge transfer to the business users as well as the IT Administrators. The vendor shall provide specific training programme for:
	+ Business users to continue operational responsibility for the delivered solution.
	+ IT staff to enable first line support to users and for the proper administration of the delivered solution.
	+ Business users and IT staff create and eventually customize reports/dashboards using the proposed reporting tools.
	+ Business users and IT staff perform basic administration tasks like create users, assign roles to users and de-activate users
	+ Business users adopt to operational changes that may arise due to the implementation of the new system for seamless uptake.
* **Documentation:** The successful vendor will be required to provide a comprehensive set of documentations regarding the application system including the solution blueprint, system manual, installation manual and user manual.
* **Post implementation support:** The Vendor should provide a minimum of three (3) months on-site post implementation support after successful Go-Live of the system.
* **Warranty:** The warranty period should be for a period of 12 months, effective immediately after the expiry of the on-site post- implementation support period. The warranty shall cover all configurations and functions as stated in the scope of the work for corrective maintenance.
* **Support and Maintenance after warranty period:** Vendors shall submit their support and maintenance costs related to support over the next two (2) years after the warranty period, based on an agreed Service Level Agreement (SLA). The support shall cover among other troubleshooting/bug fixing, patch management, fine-tuning and health checks. Vendor should also provide the response time to blocking/non-blocking issues as well as their rates on an hourly basis for any intervention that is not covered under SLA. COMESA reserves the right to proceed with award and renewal of the Maintenance agreement.

**Functional Requirements**

An Integrated Fixed Asset Tracking software should provide to COMESA Secretariat a single window platform and a repository for an up-to-date consolidated version of information concerning asset. It will give all users an access to Fixed Asset information and enhance performance reporting. It is expected to significantly improve the way of managing asset, sharing of information to different stakeholders, automated asset performance reporting, and statistical data within a secured environment.

The proposed system architecture for a Fixed Asset Tracking system is as below:



The software will comprise of the following modules:

* **Informative Portal**

The informative portal will be accessible to COMESA staff and other stakeholders and will be a single source of information for all COMESA internal policies, guidelines, procedures and processes regarding fixed asset tracking. Staff will be able to access information for current and past years.

* **Core Fixed Asset Tracking System**

The core Fixed Asset Tracking software will cater for the following activities:

* Divisions and Units – Identify Fixed Asset under their division/units.
* Store – Receipt and Tracking of Fixed Asset
* Budget and Finance – Updating and approval of Fixed Asset Register
* Assistant Secretary General (Admin & Finance) – access to fixed assets reports under the Secretariat
* Secretary General – approves capital budget for submission to Council.
* Council – Approves the organization capital budget after the review and recommendation of the Audit and Budget Committee, Administrative and Budgetary Committee and the Inter-Governmental Committee.

The system should allow various internal stakeholder to undertake the above outlined tasks in a consistent and standardize manner. (exclude council and SG as the capital budget feeds into the overall budget that is approved by Council)

During the Board of Survey report, the system should allow tracking of fixed assets.

The system should include a module for the following:

**Asset Registration**: Capability to register and record details of each fixed asset, such as asset type, description, serial number, acquisition date, cost, and location.

**Unique Identification**: Ability to assign unique identifiers, such as barcodes, QR codes, or RFID tags, to each asset for easy tracking and identification.

**Assets Movement Tracking**: Tracking of asset movements, including transfers between locations, changes in ownership, and disposal or retirement of assets. – reports on asset movements.

**Maintenance Scheduling**: Feature to schedule and track maintenance activities for assets, including routine inspections, repairs, and servicing, to ensure optimal performance and longevity. – linkage with GL for maintenance costs.

**Depreciation Management**: Management of asset depreciation over time, in accordance with accounting standards.

**Assets Auditing**: Conducting periodic audits of fixed assets to verify their existence, conditions, and location, and reconcile records with physical inventory counts. The system can generate reports that will be used for auditing purposes.

**Reporting and Analytics**: Generation of comprehensive reports and analytics on asset status, usage, maintenance history, depreciation, and other relevant metrics to support decision-making and compliance requirements.

**Customizable Dashboards**: Personalized dashboards that provide a summary view of key asset information, performance indicators, and alerts for proactive management.

**Mobile Accessibility**: Accessibility via mobile devices, allowing users to track assets, perform inspections, and update information in real-time, regardless of their location.

**Barcode/QR Code Scanning**: Support for barcode or QR code scanning capabilities using mobile devices or dedicated scanning equipment to quickly identify and update asset information.

**Alerts and Notifications**: Automated alerts and notifications for events such as maintenance due dates, warranty expirations, unauthorized asset movements and timely assets disposal.

* **Workflow**

The automated workflow will allow COMESA users to have a single view of fixed asset. Assignment of tasks will be automated to streamline processes. The system will also automatically generate mails to convey the assigner and assignee of the assignment operation.

* **Integration**
	+ **Integration with Sun Accounting System**

Financial management of the Secretariat is undertaken through the sun accounting system. The Fixed Asset Tracking system should therefore integrate with the accounting system for mining of expenditures for reporting of budget performance and controlling budget spent as per the approved budget items.

* + **Integration with the Document Management System**

The system will be integrated with the Document Management System for the tracking and approval of documents related to fixed assets.

* + **Integration with E-Signature**

The system will be integrated E-Signature for the signature of documents related to fixed assets.

* + **Integration of Procurement**

The system shall automatically generate fixed asset bought under the E- Procurement system.

* **Reports and Business Intelligence**

The fixed asset system should be integrated with a flexible management reporting tool with data extraction in various formats such as MS Word, PDF or MS Excel and includes drilling capabilities. It should include interactive dashboards and highly formatted reporting. Users should be able to design their own reports and generate them in a wide range of formats including listing, charts and pivot tables. Users should be able to access data at different levels of granularity in a single report itself.

The objective of the Business Intelligence module is to facilitate decision-making by the Head of the Division and Executive Management.

**Non-functional Requirements**

The non-functional requirements for the Fixed Asset Tracking system are as follows:

* **User interface**

The user interface is key to application usability. The System should include content presentation, application navigation, and user assistance.

* **Role-based User Groups**

The system must provide users with screens focusing on their roles (minimizing clutter).

* **Dynamic content presentation**

Users should be provided with a data presentation. The system should allow users to select appropriate settings and property values on display options that fit their preferences, e.g., choice of whether data appears in a grid, a chart, or a grid/chart combination.

* **User assistance**

The system should provide online help that includes comprehensive instructions on using each feature. The users should be provided with default mechanisms for accessing help pages e.g., by clicking the question mark icon across all the screens or a distinct menu Help > Help... menu option in the menu bar. A link to a comprehensive help resource should be provided in various formats e.g., Wiki, PDF etc.

* **User navigation**

The system should provide a simple traceable navigation of the entire system with options clearly showing the users where they are and how they can navigate away from the current screens and the consequences of doing so.

* **Saving users’ work**

The system should provide users performing data manipulation tasks to save their work at a certain point or make a particular view of the data available to other users.

* **Branding guide**

The system interface design will adhere to the COMESA branding guide which shall be provided.

* **Hardware Requirements**

The supplier shall provide the hardware sizing for the proper running of the application.

* **Hardware interface requirements**

All server-side components must execute on server-class computers. All client-side components must execute on workstation-class and personal-class computers.

* **Communication interface requirements**
* **Web browser:** The system must provide an option to be accessed via the internet using the latest browsers e.g., Chrome, Edge, Mozilla, Safari with backward compatibility support for 2 versions.

Note: in a scenario where the system uses third party plugins to run, this must be stated in advance for information security tests and clearance.

* **Communication standards and Network server communications protocols:** All communications between the server components and user interactions must be encrypted to safeguard user and data privacy. Only secure protocols shall be permitted e.g., HTTPS, FTPS with appropriate authentication and authorization mechanisms.
* **Electronic forms:** the system must provide interfaces using electronic forms either on the browser or client application. The forms must be secured.
* **Data transfer rates:** The system must provide appropriate data transfer rates that shall be agreed upon meeting performance requirements.
* **E-mail:** the system must provide communication mechanisms with various stakeholders or user groups within the system. This can be achieved via forms that create support tickets or defined emails on the COMESA (comesa.int) domain.
* **Communication security or encryption**

End to end encryption must be provided in all the interactions in the system e.g., chat facilities, web browsers, mobile apps etc.

* **Performance**

The system should be responsive and perform efficiently, even with many users and data. It should have acceptable response times for tasks such as employee data retrieval, report generation, and system updates. System performance is the most important quality in non-functional requirements and affects almost all the other preceding ones. A stress test is to be performed by the vendor once the system is commissioned.

* **Availability**

The system should be designed to minimize downtime through robust error handling, fault tolerance, and backup and recovery mechanisms. It should also have appropriate monitoring and alerting capabilities to identify and address potential issues proactively.

* **Recoverability**

The system should be designed to recover quickly from a crash or a failure in the system and return to full operation.

* **Security**

The system shall provide security measures based on best practices and international standards. Some security features may include encryption of data on database and web services, implementation using HTTPS, only authorized users are able to access the system via an authentication mechanism and Role based access.

* **Interoperability**

All system components must follow a common and standard set of exchange formats to exchange data.

* **Scalability**

The design should be scalable to provide for future business needs.

* **Seamless Integration**

The system should also be able to integrate with other systems such as Sun Financial system, M& E system, document management systems, workflow and Business Intelligence. It should provide standardized interfaces (APIs) or support industry-standard integration protocols to facilitate data exchange and interoperability.

* **Compliance**

The system should adhere to relevant legal and regulatory requirements, such as data protection and privacy regulations (e.g., GDPR) and employment law. It should support features and controls to ensure compliance, such as data retention policies, audit trails, and consent management.

* **Mobile Compatibility**

The system should be accessible and functional on mobile devices, allowing users to perform essential tasks on smartphones or tablets. The user interface should be responsive and optimized for mobile screens, enabling employees and managers to access information on the go.

* **Technology**

The system shall be developed/customize on the latest version of technology stack. The supplier shall provide the system architecture and development platform of the proposed solution.

**Project Team**

A Project Committee will be set up to provide governance, oversight, and strategic guidance for the project. The Committee serves as a central decision-making body, ensuring that the project aligns with the overall goals and objectives of the organization. The project committee will comprise of the following members:

* Director - Budget and Finance
* Director - Information Communications Technology (ICT)
* Head of Procurement
* Finance Officer
* Store Officer
* Procurement Officer
* Organisational Development Expert
* Implementation Consultants for Fixed Asset Tracking System
* End-user’s representatives from various departments

**Timeline**

The Fixed Asset system implementation project is anticipated to span for 03 months after the vendor selection and contract negotiation, which will cover a period of 01 month. The actual Project implementation timelines are as follows:

|  |  |  |
| --- | --- | --- |
| **SN** | **Activity** | **Timeline** |
| 1 | Planning and requirements gathering | To be agreed |
| 2 | System customization and configuration | To be agreed |
| 3 | Data migration and testing | To be agreed |
| 4 | Training and user acceptance testing | To be agreed |
| 5 | Rollout and post-implementation support | To be agreed |

**Implementation Plan**

The vendor shall provide a project Grant Charts detailing the project schedule, phase, task and sub-task duration, proposed phasing for roll-out of proposed system and highlight key milestone dates that illustrates the duration of tasks listed in the scope of work and identifies results and deliverable milestone. The proposed Grant Chart should be based upon the proposed project approach,timeline and presented during the initial meeting.

**Project Approach, Methodology and Governance**

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

**9.1 Testing** **and UAT**

The vendor should commit to submit Unit Test Plans, System Test Plans, Integration Test Plans, Load and Stress Test Plan. The Test Results should be submitted to COMESA as evidence of full-fledged testing carried out prior to UAT.

The vendor should submit UAT test scripts to ensure that the UAT scenarios cater for all the requirements expressed by the users. A comprehensive user manual should be made available before the training.

The UAT exercise should consist of different rounds of testing as follows:

1. Round 1 should consist of executing all the test scenarios business flow wise and identify list of issues if any by the users
2. Vendor should commit to ensure that issues identified in Round 1 are fully addressed to the satisfaction of the users prior to starting the next round (Round 2)
3. Vendor should also commit to producing evidence that that non-regression testing has been performed prior to starting next round and
4. Subsequent rounds are conducted until no further issues are identified.

**9.2 Quality Assurance Plan**

The vendor shall provide a proper Quality Assurance plan to ensure the success of project. The vendor should ensure that all work products are evaluated and that evidence is provided to the fact that:

1. It conforms to specified requirements.
2. It has been produced according to the project standards and processes.

**Change Management**

Change management strategies will be employed to ensure a smooth transition and adoption of the new Fixed Asset Management System. As the implementation and adoption of business process changes will be vital to the success of the project, the consultant should be able to explain and communicate business process changes and their associated requirements to individuals throughout the COMESA including to executive managers, division heads, subject matter experts, and end-users. The consultant shall provide guidance and mentor the project core team to successfully implement the overall business transformation and system changes for the COMESA. The change management plan will include amongst others:

* Communication plan (regular updates, town hall meetings, FAQ)
* Change impact assessment and Resistance management
* Training and Development plan for staffs affected by the change
* Feedback mechanisms, and
* Contingency plan

**Project Deliverables**

The following mandatory deliverables should be provided:

|  |  |  |
| --- | --- | --- |
| **SN** | **Deliverable** | **Details** |
| 1. | Project Management Plan and Project Documents | The project management plan shall cover the following aspects:1. Project approach and organization
2. Requirement Management
3. Scope Management
4. Schedule Management
5. Deliverable Plan
6. Configuration management
7. Quality Management
8. Risk Management
9. Change management, communication, and training plan
10. Go-Live Plan
11. Warranty service plan

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

The sign-off shall be done at the end of the operational acceptance. |
| 6. | Warranty Plan | The vendor shall provide all the terms and condition of the warranty. |
| 7. | Support Agreement | The vendor shall provide all the terms and conditions of the support. Furthermore, the vendor should provide a monthly progress report on maintenance & support activities and a periodic SLA performance report. |

**Training, Knowledge transfer and Support**

Comprehensive training will be provided to end-users and administrators to ensure proper knowledge transfer and proficiency in using the Fixed Asset Tracking system. The training programme shall be designed for:

* Business users to continue operational responsibility for the delivered solution.
* IT staff to provide first line support to users and for the proper administration of the delivered solution.
* Business users and IT staff create and eventually customize reports/dashboards using the proposed reporting tools.
* Business users and IT staff perform basic administration tasks like create users, assign roles to users and de-activate users
* Business users adopt to operational changes that may arise due to the implementation of the new system for seamless uptake.

A minimum of one (1) month on-site post implementation support will be provided. Additionally, the selected consultant shall provide ongoing support will be available through:

* Helpdesk support,
* Online resources (knowledge base, FAQs), and
* Periodic refresher training sessions

**Evaluation and Monitoring**

The success of the Fixed Asset Tracking implementation project will be evaluated based on predefined success criteria, including:

* Achievement of project milestones and deliverables within the established timeline and budget,
* User satisfaction with the system functionality and usability,
* Improvement in Fixed Asset Tracking process efficiency and accuracy,
* Seamless integration with other systems (Sun Finance System, E-Procurement, Document Management System), and
* Reduction in manual tasks and administrative overhead.

The Project Committee, through regular project status meetings and reports, will monitor progress.

**Other Requirements**

1. The vendor is required to sign a Non-Disclosure Agreement (NDA).
2. The system should support multilingual people.
3. The Fixed Asset Tracking system shall be developed using the latest and most up-to-date technologies and frameworks.
4. The security features of the system shall meet industry standards and best practices.

**Payment Terms**

The structure of payment shall be as follows:

1. **Implementation Services**

|  |  |  |
| --- | --- | --- |
| **S.N** | **Deliverable** | **Payment** |
| 1 | Inception Report with agreed project implementation plan | 10% |
| 2 | Detailed Software Requirements Specifications | 30% |
| 3 | Solution Prototype based on the Solution Blueprint | 20% |
| 4 | Go-live | 20% |
| 5 | Retention Money- 12 months after Go-Live | 20% |

1. **Support Services**

|  |  |  |
| --- | --- | --- |
| **S.N** | **Deliverable** | **Payment** |
| 1 | 12 Months post go-live Warranty | 0% |
| 2 | Annual Maintenance Contract | Annually |

**Company Profile and Profile of Consultants**

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

The Consultant shall determine the number and nature of experts they will require to achieve the objectives of the assignment, in accordance with their proposed approach and methodology. Nonetheless, the Consultant’s team shall be composed of at least four (4) experts with extensive demonstrable experience/knowledge as follows:

1. **Project Manager**

|  |  |
| --- | --- |
| **Education** | **Requisite Experience** |
| Bachelor Degree in Computer Science or related disciplineMaster’s Degree in computer science, business administration, project management or related discipline, or 5 years relevant professional experience in project management. Professional certification in project/programme management. (Desirable)  | A minimum of 5 years’ experience in managing IT projects preferably with a focus on Fixed Asset Tracking system implementations, specifically within the African region. Professional certifications in Finance or Change Management are desirable. Strong communication, leadership, and problem-solving skills are essential for effective project execution. |

1. **Solution Architect**

|  |  |
| --- | --- |
| **Education** | **Requisite Experience** |
| Bachelor Degree in Computer Science or related discipline | A minimum of 5 years of experience in solution architecture, with a focus on Fixed Asset Tracking system implementations.Relevant certifications in solution architecture, enterprise architecture, or Finance/ Fixed Asset Tracking technologies (e.g., TOGAF, AWS Certified Solutions Architect, Finance/ Planning & Budging platform-specific certifications) is desirable.Strong communication, leadership, and problem-solving skills are essential for effective project execution. |

1. **Functional Expert**

|  |  |
| --- | --- |
| **Education** | **Requisite Experience** |
| Bachelor’s degree in computer science or related discipline | A minimum of 5 years of hands-on experience working with Finance/ Fixed Asset Tracking system functionalities and implementation.Proficiency in Finance / Fixed Asset Tracking system platforms and related technologies, with specific expertise in implementation, customization, and maintenance.In-depth knowledge of Finance / Fixed Asset Tracking system platforms.Proficiency in mapping Finance/ Fixed Asset Tracking processes and aligning them with IT system capabilities to optimize workflows.Proven ability to gather and document detailed requirements from Finance/ Fixed Asset Tracking system and other stakeholders for Finance/ Fixed Asset Tracking system configurations and customizations.Hands-on experience in configuring and customizing Finance/ Fixed Asset Tracking systems to meet organizational needs.Experience in conducting comprehensive testing of Finance/ Fixed Asset Tracking solutions to ensure functionality, accuracy, and compliance. |

1. **Technical Expert**

|  |  |
| --- | --- |
| **Education** | **Requisite Experience** |
| Bachelor Degree in Computer Science or related discipline | A minimum of 5 years of hands-on experience working with Finance/ Fixed Asset Tracking technologies.Proficiency in Finance/ Fixed Asset Tracking platforms and related technologies, with specific expertise in implementation, customization, and maintenance.Hands-on experience with Finance/ Fixed Asset TrackingStrong programming skills in languages relevant to Finance/ Fixed Asset Tracking system customization (e.g., Java, Python, SQL).Proficiency in scripting languages for automation and integration purposes.Expertise in database management systems, particularly those used in Finance/ Fixed Asset Tracking (e.g., MySQL, Oracle, SQL Server) |

A Project Team Composition Template clearly indicating the manpower input months should be provided as per format in Annex 3.

In this respect, Vendors are required to submit information on reference sites and staff profiles as per format at Annex 4.

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

**Customer References**

To be eligible for this exercise, vendors should have at least three (3) reference sites where they have successfully implemented a similar project in the last two (02) years.

**Annexes**

**Annex 1: Process Steps for Fixed Asset Tracking**

|  |  |  |  |
| --- | --- | --- | --- |
| ***Step*** | **Who** | **Performs what** | **Systems** |
| *1* | Procurement | * Procurement of fixed assets upon approval and confirmation of funds by the Director of Finance.
* An email notification shall be sent to the store regarding the procurement and the date of delivery.
 | E-Procurement  |
| *2* | Store | * Store Officer receive asset as per date of delivery
* Record fixed asset in the system
* System automatically generate Asset Code and update the stock/ fixed asset register
* The fixed asset register in Sun system shall be automatically updated
* An email notification should be sent to Head of Procurement/ Director HR & Admin/ Director Finance/ Finance Officer/ Assistant Secretary General (Finance & Admin) once fixed asset has been received and asset code generated
 | Fixed Asset Tracking |
| *3* | Board of Survey | * Scan Fixed asset in each location
* Automatically update store sheet/fixed asset register
* Generate Board of Survey report
* Send Board of Survey report for review and approval
 | Fixed Asset Tracking |
| *4* | Director HR & Admin | * Review and Approve Board of survey report
 | Fixed Asset Tracking |
| *5* | Director of Finance | * Review and Approve Board of survey report
 | Fixed Asset Tracking |
| *6* | Assistant Secretary General (Finance and Admin | * Review and Approve Board of survey report
 | Fixed Asset Tracking |
| *7* | Secretary General | * Receives a notification for approval of Board of Survey report.
* Review and approved the Board of Survey Report
* Update Fixed Asset Register
* Notification sends to Assistant Secretaries/Directors/ Head of Unit/Finance Experts/ Procurement/Other Stakeholders on approval of Board of Survey Report
 | Fixed Asset Tracking/ Sun System |

**Annex 2: Project Team Composition Template**

|  |  |  |  |
| --- | --- | --- | --- |
| **SN** | **Name of Expert** | **Designation** | **Manpower Input in Months** |
| **Remote** | **On-Site** | **Total** |
| 1 | Name  | Project Manager | 2 | 4 | 6 |
| 2 | Jane Doe | Solution Architect | 0 | 6 | 6 |
| 3 | Expert III | Designation III | 2 | 4 | 6 |
| 4 | Expert IV | Designation IV | 3 | 3 | 6 |
| 5 | Expert V | Designation V | 5 | 1 | 6 |
| 6 | Expert VI | Designation VI | 2 | 4 | 6 |
| 7 | Expert VII | Designation VII | 2 | 4 | 6 |
| 8 | Expert VIII | Designation VIII | 1 | 5 | 6 |

**Annex 3: Individual Team Profiles**

|  |
| --- |
| **Curriculum Vitae: Expert 1** |
| **Role in the Project** | Role X |
| **Name of Expert** | Expert 1 |
| **Date of Birth** | Dd/mm/yyyy |
| **Nationality** | XXXX |
| **Education** |
| **No.** | **Degree** | **College** | **Year** |
| 1 | Bachelor of Science XXX  | College Name | 2002 |
| 2 | Master of Science XXX | College Name | 2010 |
| **Professional Certifications** |
| **No.** | **Certification**  | **Body and Number** | **Status** |
| 1 | Certified XXX | Body X Certificate # | Active |
| 2 | Certified XXX | Body X Certificate # | Expired |
| **Expert Profile Summary** |
| **Work Experience** |
| **No** | **Employer** | **From** | **To** | **Designation** |
| 1 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| 2 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| 3 | Employer X | 00/00/0000 | 00/00/0000 | Designation x |
| **Project Experience Related to Current Assignment** |
| **Project Client** | Client Name |
| **Project Summary** |
| **Responsibilities in the project** |
| **Technologies Used** | Technology 1, Technology 2, Technology N |
| **Sign** | Expert Signature | **Date** | 00/00/00 |

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

[*Location, Date*]

To:

**COMESA SECRETARIAT**

**BEN BELLA ROAD**

**P.O BOX 30051**

**LUSAKA, ZAMBIA**

**Tel: 260 211 229725 – 32**

Dear Sirs,

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

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

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

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

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

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

 We remain,

Yours sincerely,

Authorized Signature [*In full and initials*]:

Name and Title of Signatory:

Name of Firm:

Address:

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

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

#### A - On the Terms of Reference

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

#### B - On Counterpart Staff and Facilities

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

**C - On Standard Terms of Contract**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

***[insert the details]***

1. ***Statement:***

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

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

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

|  |  |  |
| --- | --- | --- |
|  | Date: | 9 October 2024 |

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

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

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

 Full time input

 Part time input

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

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

**ANNEX 3: Financial Proposal Submission Forms**

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

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

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

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

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

## FORM FIN-1 FINANCIAL Proposal Submission Form

[*Location, Date*]

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

Dear Sirs,

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

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

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

 We remain,

Yours sincerely,

Authorized Signature [*In full and initials*]:

Name and Title of Signatory:

Name of Firm:

Address:

## FORM FIN-2: SUMMARY of Costs

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

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

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

## Form FIN-4: Breakdown of Reimbursable Expenses

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

**ANNEX 4: Standard Terms and Conditions**

**STANDARD CONTRACT FOR CONSULTING SERVICES**

THIS Contract is entered into between,

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

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

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

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

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

|  |  |
| --- | --- |
| **1. Services** | (a) The Contractor shall perform the services specified in Annex A, “Terms of Reference and Technical Proposal,” which is made an integral part of this contract (“the Services”).(b) The Contractor shall provide the personnel listed in Annex B, “Service Provider’s Personnel,” to perform the Services.(c) The Contractor shall submit to COMESA the reports in the form and within the time periods specified in Annex C, “Service Provider’s Reporting Obligations.” |
| **2. Term** | The Contractor shall perform the Services during the period commencing ***[insert the date]*** and continuing ***[insert the date]*** or any other period as may be subsequently agreed by the parties in writing. |
| **3. Termination**  |  |
| **3.1 By COMESA**  | COMESA may terminate this contract in case of the occurrence of any of the events specified in paragraphs (a) through (g) of this Clause 3.1. In case of an occurrence specified in (a) to (g) COMESA shall give not less than seven (7) days’ written notice of termination to the Service Provider(a) If the Contractor fails to remedy a failure in the performance of its obligations hereunder, within seven (7) days of period after the receipt of a registered mail with acknowledgment of receipt specifying the failure.(b) If the Contractor becomes (or, if the Contractor consists of more than one entity, if any of its members becomes) insolvent or bankrupt or enter into any agreements with their creditors for relief of debt or take advantage of any law for the benefit of debtors or go into liquidation or receivership whether compulsory or voluntary.(c) If the Contractor fails to comply with any final decision reached as a result of arbitration proceedings pursuant to Clause 15 hereof.(d) If the Service Provider, has engaged in corrupt or fraudulent practices in competing for or in executing this Contract.(e) If the Contractor submits to COMESA a false statement which has a material effect on the rights, obligations or interests of COMESA.(f) If, as the result of Force Majeure, the Contractor is unable to perform a material portion of the Services for a period of not less than fourteen (14) days.(g) If COMESA, in its sole discretion and for any reason whatsoever, decides to terminate this Contract.Early termination shall not prejudice or affect the accrued rights or liabilities of the Parties.  |
| **3.2 By the Service Provider** | The Contractor may terminate this contract, by not less than seven (7) days’ written notice to COMESA, in case of the occurrence of any of the events specified in paragraphs (a) through (d) of this Clause 3.2.(a) If COMESA fails to pay any money due to the Contractor pursuant to this contract (which is not subject to dispute pursuant to Clause 15 hereof) within seven (7) days after receiving written notice from the Contractor that such payment is overdue.(b) If, as the result of Force Majeure, the Contractor is unable to perform a material portion of the Services for a period of not less than fourteen (14) days.(c) If COMESA fails to comply with any final decision reached as a result of arbitration pursuant to Clause 15 hereof.(d) If COMESA is in material breach of its obligations pursuant to this Contract and has not remedied the same within thirty (30) days (or such longer period as the Contractor may have subsequently approved in writing) following the receipt by COMESA of the Service Provider’s notice specifying such breach.Early termination shall not prejudice or affect the accrued rights or liabilities of the Parties.  |
| **4. Payment** | A. Ceiling For Services rendered pursuant to Annex A, COMESA shall pay the Contractor an amount not to exceed ***US$*** ***[insert the amount in figures and letters]***. This amount has been established based on the understanding that it includes all of the Service Provider's costs and profits as well as any tax obligation that may be imposed on the Service Provider.B. Schedule of Payments The schedule of payments is specified below:[[22]](#footnote-22)1***[insert amount (which shall me maximum 20% of the contract value) and currency]*** upon COMESA's receipt of a copy of this Contract signed by the Contractor;***[insert amount and currency****]* upon COMESA’s receipt of the ***[insert the name and the description of the deliverable****],* acceptable to COMESA;***[insert amount and currency]***upon COMESA’s receipt of the ***[insert the name and the description of the deliverable****]*, acceptable to COMESA; and***[insert amount (minimum 10% and maximum 30% of the contract value) and currency]***upon COMESA’s receipt of the final report, acceptable to COMESA.***[insert amount and currency]***TotalC. AcceptanceThe Deliverables, meaning Reports or Services submitted to an Acceptance (either formal or not), are listed in the Annex C thereof.Acceptance means express or tacit acknowledgment that the Deliverables comply with the Contract.The following principles are always applicable:1. Unless COMESA makes reservations within fourteen (14) working days from the submission, the Deliverables are deemed accepted;
2. In case of reservations by COMESA during the Acceptance Period, the Deliverables are deemed accepted once the reservations are withdrawn;
3. It is expressly agreed that the use of any Deliverables or any phase of the Contract means the final Acceptance of the phase or the corresponding Deliverables; and
4. The Acceptance is definitive and cannot be doubt for any reason whatsoever.

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

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

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

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

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

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

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