



Request for Proposals

Migration of the application Pegase (K2 Five / Sharepoint 2019)

Date: 20 November 2020

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1 Introduction

1.1 Profile of the UPU

The Universal Postal Union (UPU) was founded in 1874 in Berne, Switzerland, with the main goal of establishing a single postal territory for the reciprocal exchange of letter-post items and adopting common principles for the international postal service in a non-discriminatory manner. Currently comprising 192 member countries, the UPU became a specialized agency of the United Nations in 1948.

The main mission of the UPU is to stimulate the lasting development of efficient and accessible universal postal services of quality, in order to facilitate communication between the inhabitants of the world. This encompasses the commitment towards free circulation of postal items over a single postal territory composed of interconnected networks, adoption of fair common standards and use of technology, cooperation and interaction among stakeholders, promotion of effective technical cooperation, and satisfaction of customers' changing needs. The UPU is thus expected to play a major role in the constant revitalization of postal services.

Furthermore, the UPU facilitates the development of worldwide postal services by providing an information and communication technology environment which allows designated operators (DOs)¹ of UPU member countries to concentrate on the delivery of postal services to their customers. In this context, the UPU provides a global network with value-added services, as well as computerized applications for the management of international mail and international postal money orders.

2 Terms and conditions

Unless otherwise stated in this request for proposals (RFP), the term "Bidder" shall refer to any person, company or legal entity submitting a proposal in response to this RFP. The term "Vendor" shall refer to a successful Bidder, as the case may be.

2.1 Confidentiality

Bidders shall treat in strict confidence all information contained in this RFP and its attached documents which is not already publicly known or generally accessible, particularly any documentation marked as confidential and distributed by the UPU to Bidders as additional confidential RFP documentation. Bidders shall prevent disclosure or distribution of all such information to third parties and other entities and persons not expressly authorized herein. In case of doubt, these confidentiality provisions shall nevertheless be observed. All Bidders are obliged to observe these confidentiality provisions before, during and after the tendering process. These provisions shall not affect the UPU's and the Bidder's legal obligations to disclose information.

Bidders shall not use such information for any purpose other than the purposes associated with this RFP. This RFP and all attached documents may only be distributed or made available to persons directly involved in the tendering process on behalf of Bidders. In case external agents or subcontractors are involved in the preparation of the tender documents, they have to be named and indicated in the participation notification (see section 2.3 below).

Bidders assume full responsibility for compliance of their agents, employees and subcontractors, as well as any third parties involved on their behalf in this tendering process, with these rules of confidentiality and shall be liable for any damages resulting from misconduct or unauthorized disclosure.

If a Bidder violates the confidentiality provisions contained herein, it shall be liable to pay a penalty to the UPU unless the Bidder can prove that no fault is attributable to it. This penalty shall amount to no more than CHF 50,000 per infringement. Payment of any such penalty shall not release Bidders from their obligation to observe these confidentiality requirements.

Bidders willing to submit proposals in response to this RFP shall contact the persons specified in section 2.15 below and may request receipt of additional information related to this RFP from the UPU, as the case may be.

Without prejudice to the confidentiality provisions set out above, Bidders hereby agree that the receipt of any

¹ In accordance with article 1.7 of the Constitution of the UPU, a designated operator is any governmental or non-governmental entity officially designated by the member country to operate postal services and to fulfil the related obligations arising out of the Acts of the Union on its territory.

such additional information may be subject to the prior signature of a non-disclosure agreement between the Bidder and the UPU, under conditions to be determined and communicated by the latter.

2.3. *Legal status of the Vendor*

The Vendor shall be regarded in law as having the legal status of independent contractor. The Vendor and its consultants, employees, and subcontractors (as authorized by the UPU) shall in no way be regarded as employees of the UPU. Such consultants, employees and subcontractors of the Vendor shall not be entitled to any employment benefits of the UPU. The Vendor shall be solely responsible for due payment of all compensation owed to such consultants, employees, and subcontractors, including payment of any employment taxes, benefits, compensation and insurance. The Vendor represents and warrants that it will comply with all laws, rules and regulations required by the relevant authorities, including the appropriate withholding, reporting and payment of all necessary taxes.

The Vendor shall be liable for all work performed by its employees, consultants, and subcontractors, as well as for any act or omission by such employees, consultants, and subcontractors.

The Vendor shall not assign, sublicense, subcontract, pledge or otherwise transfer or dispose of its offer, or any of the rights and obligations contained in it, without prior written consent of the UPU.

The approval by the UPU of the engagement of any subcontractor shall not relieve the Vendor of any of its obligations or responsibilities concerning the work performed by any subcontractor.

2.4. *Scope of the RFP*

This RFP concerns the provision of consultancy services to the UPU for the recast and the migration to SharePoint 2019 and K2 5.4 of the application Pegase (pegase.upu.int) supporting the production of documents in six languages. The recast and the migration of this application includes:

- Functional and technical design of the solution
- Development of fully native SharePoint 2019 and K2 5.4 solutions based on the requirements listed in the RFP combined with commercial Off-The-Shelf solutions
- Creation of packages ready for deployment to pre-production and production environments
- Content migration including PDOC requests, reference data and K2 workflow instances
- Branding based on the new UPU visual identity
- Migration of existing SSRS reports (7 reports) to Power BI
- Maintenance & Support for bug fixing for 1 year
- End-users training, Knowledge transfer to IT Staff
- User and technical documentation

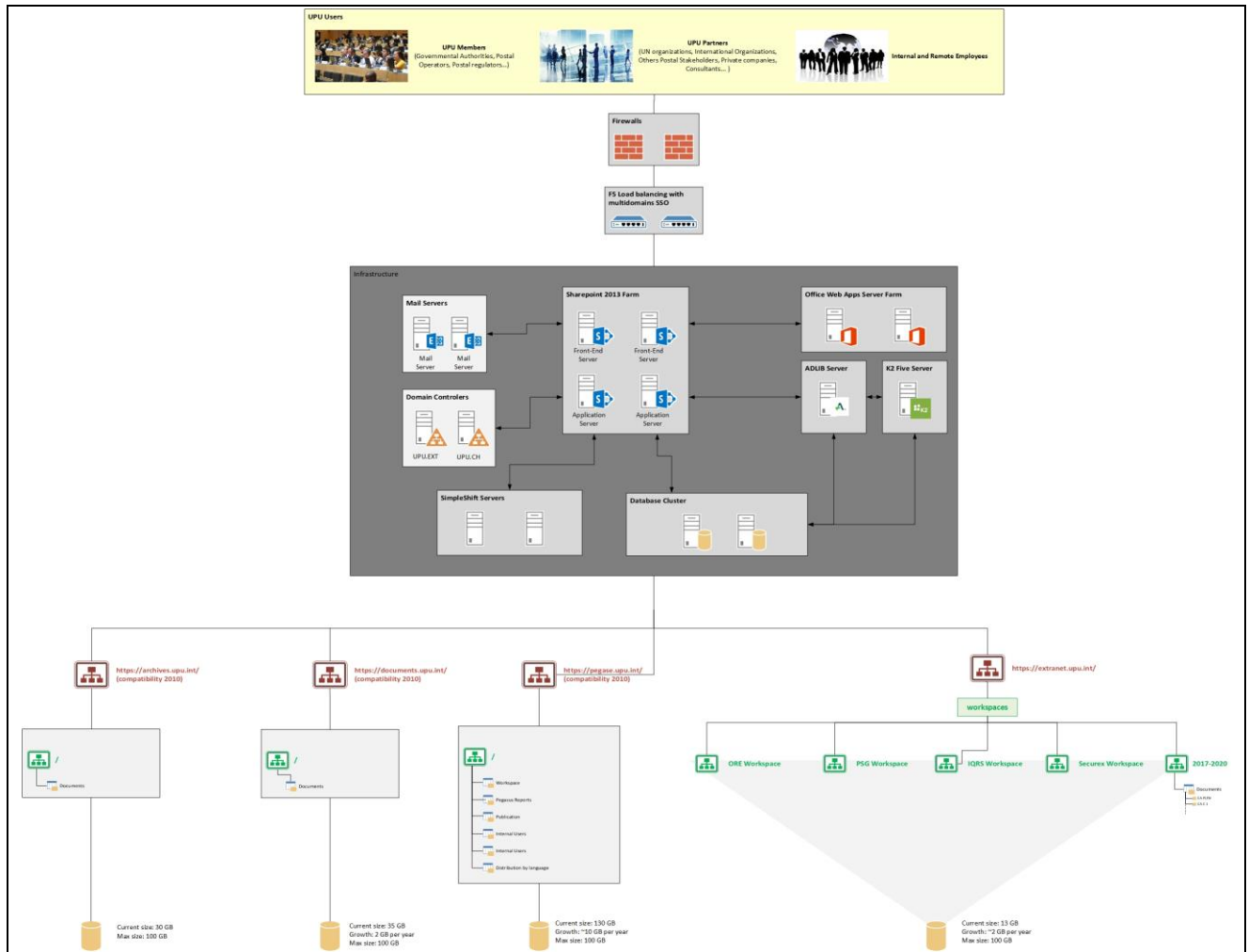
2.5 *Background*

The Document Management System is a critical component of the UPU information system. It supports UPU Bodies activities and production of UPU official documentation.

The existing solution is described in the following annexes:

- Annex 01: User Manual Pegase
- Annex 02: User Manual UPU Document Management System (Publishing Site)
- Annex 03: Detailed functional specifications
- Annex 04: UPU Documents Production Processes
- Annex 05: Technical Specifications Pegase

The current topology is describe below:



Key components:

- F5 Big IP used as an Identity provider and network load balancer
- One SharePoint 2013 custom Team Site in 2010 compatibility mode (<https://pegase.upu.int>), also called Pegase, used to facilitate the collaboration between the different teams (translators, typists...) during the production of official documents in 6 languages from translation to publication.
- Two SharePoint 2013 custom publishing sites in 2010 compatibility mode (<https://documents.upu.int> and <https://archives.upu.int>) used to store and make UPU official documents (Meeting documents, Circulars, Forms and EMIS) accessible to UPU members during UPU events (Congress, Sessions, Inter Session meetings...) or outside.
- K2 BPM Platform 4.7 that hosts the workflows used to automate the production of UPU documents in 6 languages.
- ADLIB server 5.3 used to create and merge automatically documents into PDF format from K2 and SharePoint
- myCAT concordancer (Olanto Foundation), also called SimpleShift, used for multilingual search and text alignment. myCAT is integrated with SharePoint via a custom solution.
- Aspose.Word 15.9 used to generate the tracking document for a Pegase request
- SQL Server 2014 SP2 and SSRS installed in SharePoint mode

All these components are integrated with:

- Active Directories with trusted domains (UPU.CH and EXT.UPU)
- MS Exchange 2013
- Office Web App servers 2013

2.6. Objectives

The goal is to get by **Mai 31, 2021** a completely revamped Pegase application running in **SharePoint 2019 and K2 5.4** on premise with standard support for the next 3 years, get users trained and all the data migrated including the history of PDOC requests, reference data and active workflow instances.

This project should help the UPU to achieve the following objectives:

1. Enhance user experience with the new SharePoint 2019 modern design, a new UPU visual identity, and an intuitive navigation,
2. Use metadata massively to enhance the PDOC requests, enable advanced and multilingual search capabilities and make PDOC requests more accessible for users,
3. Recast the structure of the Pegase application to sustain the production of documents on the long term, to have a better control of its growth and security, to enable in place record management and to comply with products limits and boundaries,
4. Improve the performance of processes, the collaboration between teams and generate dashboards (forecast) for the production of UPU documents with streamlined workflows, smart forms and revamped reports,
5. Leverage SharePoint 2019 and K2 five native capabilities to ensure technology independence, facilitate the maintenance, enable on-premises solution development for a potential Cloud future, and reduce maintenance costs and architecture complexity.

2.7. Use of the emblem, name, and initials of the UPU

Bidders/Vendors shall not advertise or otherwise make public the fact that they intend to provide, are providing or have provided services to the UPU, or use the emblem, name or initials of the UPU in connection with their business for purposes of commercial advantage or goodwill without prior and explicit permission from the UPU. Bidders/Vendors shall take all reasonable measures to ensure compliance with this provision by their agents, employees, and subcontractors.

2.8. Collusive bidding, anti-competitive conduct, or any other similar conduct

Without prejudice to the provisions contained in sections 3 and 4 below, Bidders (including their agents, consultants, employees, and subcontractors) shall not engage in any collusive bidding, anti-competitive conduct or other similar conduct, in relation to:

- the preparation or submission of offers
- the clarification of offers
- the conduct and content of negotiations, including final contract negotiations.

For the purposes of this RFP, collusive bidding, anti-competitive conduct or any other similar conduct may include disclosure to, or exchange or clarification with, any other Bidder of information (in any form), regardless of whether such information is confidential to the UPU or to any other Bidder, in order to alter the results of the RFP in such a way that would lead to an outcome other than that which would have been obtained through a competitive process. In addition to any other remedies available to it, the UPU may, at its sole discretion, immediately reject any offer submitted by a Bidder that, in the UPU's opinion, has engaged in any collusive bidding, anti-competitive conduct or other similar conduct with any other Bidder in relation to the preparation or submission of offers, whether in respect of this RFP or other procurement processes conducted by the UPU.

2.9. Intellectual property

This RFP and all its attached documents, including any content, forms, statements, concepts, projects and procedures explicitly or implicitly forming part of this RFP, constitute the exclusive intellectual property of the UPU. This RFP is communicated to the various Bidders with the sole purpose of assisting them in the preparation of their respective offers. Any hard copies of this RFP shall be destroyed or returned to the UPU by non-selected Bidders upon request of the UPU.

2.10. Privileges and immunities

Nothing in or relating to this RFP, the activities described herein or any potential agreements related thereto shall be deemed as a waiver, expressed or implied, of any of the privileges, immunities and facilities which the

UPU enjoys as a specialized agency of the United Nations system, pursuant to the Swiss Host State Act and the Agreement on Privileges and Immunities of the United Nations (on Swiss territory), the Convention on the Privileges and Immunities of the Specialised Agencies (outside Switzerland), as well as any other conventions and laws recognizing and/or granting such privileges, immunities and facilities to the UPU and its officials (such as the International Organizations Immunities Act in the case of the United States of America).

Accordingly, Bidders shall expressly acknowledge and agree that the property and assets of the UPU, including any archives, data, documents and funds belonging to the UPU or held by it (including without limitation the data/hosting environments and servers pertaining to or associated with the provision of the services, as well as any data or document in any form belonging to or held by the UPU on behalf of UPU member countries and their DOs), are inviolable and shall be immune from search, requisition, confiscation, expropriation and any other form of interference, whether by executive, administrative, judicial or legislative action. Bidders shall immediately contact the UPU in case of any attempt to violate or any violation of the UPU's privileges and immunities and take any reasonable measures to prevent such a violation.

In the light of the UPU's status as a specialized agency of the United Nations (and without prejudice to the observance, by the UPU, of any sanctions established by the United Nations Security Council), Bidders shall expressly certify their legal and operational willingness and ability to provide the services on a non-discriminatory basis for the benefit of all eligible entities established and/or situated in the territory of any UPU member country, irrespective of the existence of diplomatic relations between a Bidder's country of incorporation and/or operation and any UPU member country (including its DOs).

2.11. Tax exemption

Pursuant to article III, section 9, of the Convention on the Privileges and Immunities of the Specialized Agencies, the UPU is exempt from all direct taxes and from customs restrictions, duties, and charges of a similar nature in respect of articles imported or exported for its official use.

Furthermore, the UPU, as an intergovernmental organization and a specialized agency of the United Nations, is exempt from Value Added Tax (VAT) in Switzerland (OLTVA, article 22; *Instructions 2001 sur la TVA*, articles 574, 816 and others), as well as in other countries; **therefore, any prices shall be indicated "net", without VAT or similar taxes.**

2.12. Language

Tender documents shall, in their entirety, be formulated by Bidders in English.

2.13. Signature

Tender documents shall be signed by a representative (or representatives) duly designated and authorized to act on the Bidder's behalf and with the authority to legally bind the Bidder and accept the terms and conditions of this RFP.

2.14. Participation notification

Upon receipt of this RFP, the Bidder shall send a confirmation of participation to all contact persons listed in section 2.15.

2.15. Contact persons

Secretary of the Tenders and Procurements Committee

Universal Postal Union
International Bureau
Weltpoststrasse 4
3000 Berne 15
Switzerland
Telephone: +41 31 35 03 162 / +41 31 35 03 502
E-mail: caa@upu.int

2.16. Further inquiries and questions

Questions regarding the content of this RFP or any associated requests for clarification from Bidders shall be transmitted to the UPU in written form to the contact persons listed in section 2.15 above, **by 9 December 2020**.

Answers to questions submitted by Bidders or additional information shall be published and regularly updated on the UPU website (www.upu.int/en/ressources/appels-doffres/appels-doffres-en-cours.html).

2.17. Delivery of offers and deadline

In the light of the current situation relating to the ongoing COVID-19 pandemic, all bids shall, on an exceptional basis, be submitted electronically to the UPU at **RFP-2020-024@upu.int** with **“Migration of the application Pegase (K2 Five / Sharepoint 2019)”** as subject.

The deadline for bid submission is **16 December 2020, at 16:00 Central European Time (CET)**.

Offers received after this date will not be considered by the UPU. Moreover, offers sent to any address other than the one specified above or by any other means shall not be accepted by the UPU.

The preparation and submission of tender documents by Bidders shall be free of charge for the UPU.

2.18. Evaluation procedure

The objective of the evaluation process is to ensure the selection, by the UPU, of a qualified, reliable and experienced Vendor that can deliver specialized consulting services and fulfill the objectives set out in section 2.6 above.

The evaluation procedure shall be conducted by the UPU with a view to determining, at the UPU's sole discretion and as objectively as possible, the bid that best meets the specific requirements of the UPU, on the basis of its assessment of bids received against the requirements defined herein. The prescribed structure of the tender documents (as set out in sections 3 and 4 below) is mandatory for all Bidders. Bids not fulfilling the mandatory criteria as indicated in sections 3 and 4 below shall not be taken into further consideration by the UPU.

Bids received by the UPU must address all aspects of the RFP for which they envisage necessary modifications or identify missing elements.

Package selection will be based upon a non-exhaustive list of selection criteria as set out in section 4.2. Bidders are therefore required to consider how their package fits in with the criteria listed and to clearly indicate this in their response document.

The deliberations of the UPU Tenders and Procurements Committee (TPC/CAA) are strictly confidential. The TPC shall submit a report on the evaluation of bids received to the Director General of the UPU International Bureau, together with its final recommendation for his assessment and authorization.

The UPU General Terms and Conditions for the Provision of Services (see **Annex 1**) shall be accepted by Bidders. The final terms of any resulting contract shall be defined by the UPU and accepted by the Vendor. Contract negotiations shall only start after final selection by the UPU of a Vendor. Bidders will be informed immediately after a selection decision is taken by the UPU.

2.19. Modification, suspension, or cancellation of the RFP

The UPU reserves the right, **at its sole discretion and at any time** before conclusion of the RFP (i.e. at any time prior to the signature of the relevant contract with the Vendor), to modify, suspend or cancel all or part of this RFP.

2.20. Tentative schedule

Publication of RFP	20 November 2020
Deadline for receipt of offers by the UPU	16 December 2020, at 16:00 Central European Time (CET)
Estimated start of engagement	Mid January 2021

3 Offer structure – Response format

All information provided shall be delivered by Bidders in full conformity with the terms and conditions set out in section 2 above.

Moreover, the requirements stipulated in this RFP shall be covered in their entirety, according to the structure defined below and following the sequence and numbering provided in this section. The UPU shall evaluate all Bidder responses in accordance with the structure defined herein.

3.1 Cover letter

Bidders shall submit a cover letter including:

- A statement that the Bidder has read, understands, and agrees to all provisions of this RFP.
- its name, telephone number, address and e-mail address, and the name(s) of its representative(s).

The cover letter shall be signed by a representative (or representatives) duly designated and authorized to act on the Bidder's behalf and with the authority to legally bind the Bidder and accept the terms and conditions of this RFP, and shall also include a confirmation of such authorization by the Bidder, as well as a statement that the Bidder's proposed tender documents are valid for a minimum period of 120 days.

3.2 Executive summary

The Bidder shall provide an executive summary highlighting the most important aspects of its offer.

3.3 Bidder information

- Company structure, locations/subsidiaries;
- Financial data (turnover, profit, etc.);
- Partners and equity holders of the company;
- Company history;
- Market position and share in the relevant markets.

3.4 Subcontractor information

Vendors may not assign, sublicense, subcontract, pledge or otherwise transfer or dispose of its offer, or any of the rights and obligations contained in it, without prior written consent of the UPU.

The approval by the UPU of the engagement of any subcontractor shall not relieve the Vendor of any of its obligations or responsibilities concerning the work performed by any subcontractor.

3.5 Technical Proposal

The Bidder must ensure that the Technical Proposal meets all requirements outlined in Section 4.

The Bidder shall prepare and submit for consideration a technical proposal that outlines the methodology, process, and timelines of how the Bidder intends to deliver all the objectives of this RFP as outlined in Section 4. Assessment criteria for the Technical Proposal is outlined in Section 4.2.

3.6 Pricing structure

Bidder shall provide a detailed pricing structure as required under Section 4.6 below. Bidders shall not include VAT in the aforementioned pricing structure (see section 2.11 above). Furthermore, **all pricing information shall be set out exclusively in Swiss Francs (CHF)**.

3.7 UPU General Terms and Conditions

Bidders shall include a statement of acceptance of the UPU General Terms and Conditions for the Provision

of Goods and Services, attached hereto for reference.

3.8 *Delivery and payment schedule*

Delivery and payment schedules shall be proposed by Bidders in their financial proposals and agreed upon with the UPU.

4 **Requirements**

4.1 *Description of the services*

The Vendor shall conduct the project and fulfil the objectives as follows:

- **Objective 1 – Analysis and Design of the future solution**

The UPU will provide at the beginning of the project:

1. the up-to-date business requirements and functional documents based on the existing application
2. the existing data model and existing content definition (document types, reports, email templates...)
3. the user stories and test cases
4. the data models, interface, and corporate graphical guidelines (including SharePoint and K2 themes)

The Vendor shall conduct a limited analysis of the existing technical solution and documentation delivered by the UPU at the beginning of the project.

The Vendor shall conduct remotely interviews with UPU super users and process owners.

The Vendor shall design the future solution in collaboration with UPU IT experts and write the technical design documents and architecture diagrams.

The new technical design shall leverage SharePoint 2019 and K2 5.4 native capabilities, ensure long term storage of PDOC requests, minimize technology dependences with more modularity, enable on-premises solution development for a potential Cloud future and reduce architecture complexity.

- **Objective 2 – Development and implementation of the future solution**

The Vendor shall build the future solution using the development environment installed and hosted by the UPU. This includes:

- the development of SharePoint artefacts (site template, lists, site columns, webparts, apps...) with MS Visual Studio, the new SharePoint 2019 Framework (SPFx) and DevExpress Framework.
- the development of K2 workflows and smart forms
- the implementation of the new UPU branding by reusing the SharePoint and K2 themes provided by the UPU

The Vendor shall justify the use of an Off-the-Shelf solution or an alternative JS Framework.

Vendor will have a remote access to the development environment including:

- SharePoint Framework development environment
- Code Editor (Visual Studio)
- DevExpress libraries with licenses provided by the UPU for the project

- **Objective 3 – Testing**

The Vendor shall proceed to unit testing on the new solution. Assistance to the UPU during User Acceptance Testing is an option.

The Vendor shall consider the future solution as accepted when the UAT document signed by the UPU and the solution running in production.

- **Objective 4 – Deployment of the future solution**

The Vendor shall provide the packages, scripts and instructions to deploy the future solution in pre-production and production environments.

Assistance to the UPU for the deployment of the future solution in pre-production and production environments is an option.

- **Objective 5 – Data transfer**

Migration of reference data by the vendor is an option. UPU may complete this task under the supervision and with the assistance of the Vendor.

Migration of Documents and existing PDOC requests metadata by the vendor is an option. UPU may complete this task under the supervision and with the assistance of the Vendor.

For the migration of K2 active instances, the UPU plans to:

- install a new K2 Five (5.4) farm instance
- run the existing K2 4.7 and the new K2 5.4 instance in parallel for 3 months
- migrate all documents and reference data of requests completed on K2 4.7 platform
- decommission the existing K2 4.7 platform when all the existing instance are completed

The Vendor shall confirm the validity of this scenario.

The Vendor shall confirm if K2 can issue to the UPU a temporary license for the legacy environment for 3 months.

The Vendor shall indicate if it is possible to extend the duration of this temporary license to 6 months maximum if needed.

- **Objective 6 – Project Management**

The Vendor shall lead all project management activities including:

- Project initiation and scoping
- Planning and budget follow-up
- Project execution and reporting
- Project closure

The vendor shall adopt an agile methodology for this project.

Bidders may consider the following guidance on time allocation to the different objectives of the study:

- Objective 1 – Analyse : 15%;
- Objective 2 – Development : 35%;
- Objective 3 – Testing : 15%;
- Objective 4 – Deployment : 10%;
- Objective 5 – Data transfer : 10%;
- Objective 6 – Project Management : 15%;

4.2 Bidder Requirements and Assessment Criteria

The Bidder shall be a certified Microsoft partner and developers involved in the project must be certified MCSD on SharePoint (minimum 2016, ideally 2019).

K2 Partnership is a plus.

Moreover, Bidders are expected to demonstrate established experience in successfully delivering SharePoint

and K2 projects in the English language;

The selection criteria for the Vendor will be of 70 points for the technical proposal, and 30 points for the financial proposal.

The technical proposal shall be assessed on the following criteria:

Criteria	Points Obtainable
Microsoft Partnership Level	10
K2 Partnership Level	10
Experience and understanding of UPU requirements	20
Proposed methodology	10
Team composition, and experience of team members	20

Bidders shall provide evidence of meeting these requirements through a list of citations.

4.3 *Functional requirements*

UI will be supported in French and English with native SharePoint 2019 and K2 capabilities.

Based on the specifications of the existing solution (see. annexes 2 to 6), the new Pegase application will be redesigned and redeveloped by the selected partner leveraging native SharePoint 2019 and K2 capabilities.

This includes:

- Reference data management (directorates and programs, roles matrix, meetings, bodies,...) using standard SharePoint lists, content types and columns
- User task list and Dashboards for Translation services, Editing Services, Typing pools.
- PDOC requests list with different views (draft, in progress, completed, draft, by directorate / program, My requests, Requests of my groups...)
- PDOC tracking document
- PDOC requests attachments and workspaces for storing original, intermediate and final documents with long term storage perspective and compliance with SharePoint limits and boundaries.
- Dynamic and low level permission management on PDOC requests and related documents
- Search functions to retrieve PDOC requests with advanced filtering options (by reference, status, subject, document type, directorate, text in the description...)
- Streamlined workflows
- Smart forms

Options

Reporting

Migration of the existing 7 reports by the Vendor are optional

Document production planning table

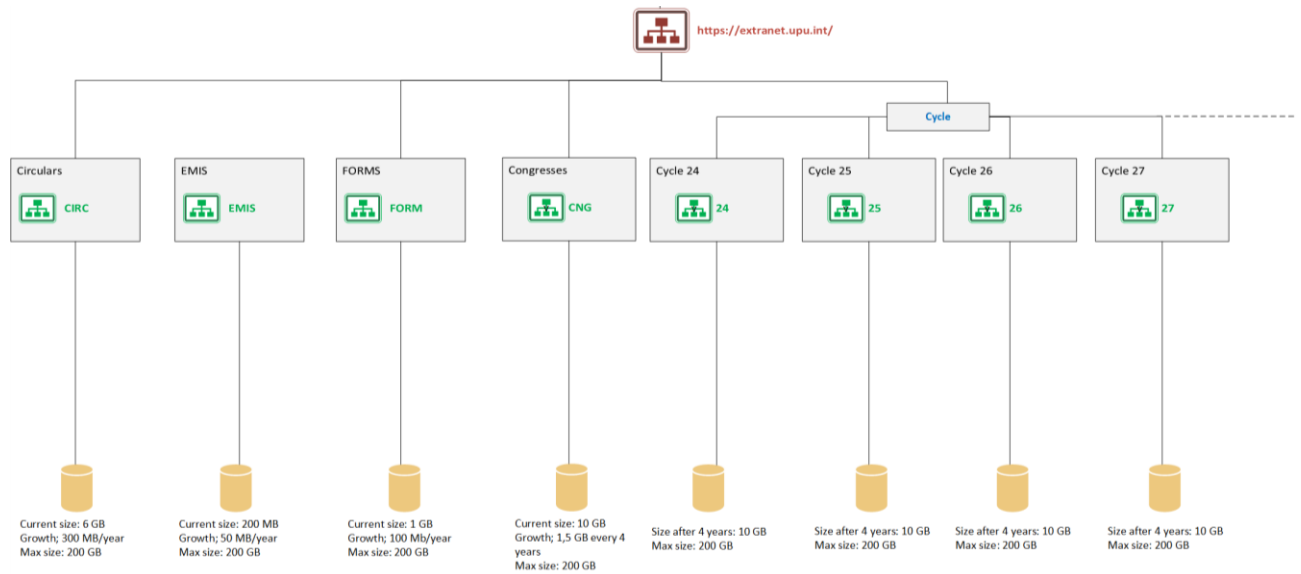
This is a "living" table containing all the documents published or planned for publication during the CA and POC sessions. It enables the status of document production to be continuously monitored. It is on the basis of this table that document production priorities are negotiated by the document production coordinator with the different IB directorates and programmes in the lead up to the sessions. After the sessions this table provides statistics (number and length of documents, observance of deadlines for transmission to document production services, compliance with standards, etc.)

A sample of the Document production planning table is annex 07.

Excluded from scope

Migration of the existing Sharepoint publishing sites used for the publication of UPU Documents is excluded from scope.

The corpus of UPU documents will be reorganized as follow:



- Circulars, EMIS, UPU Forms will be stored in dedicated site collections with publishing features
- Congresses documents will be stored in a dedicated site collection with sub websites by Congress. Congress site will be created from a site template with predefined libraries, content types, metadata and search capabilities
- Meeting documents supporting UPU bodies activities will be stored by cycle in dedicated site collections with publishing features

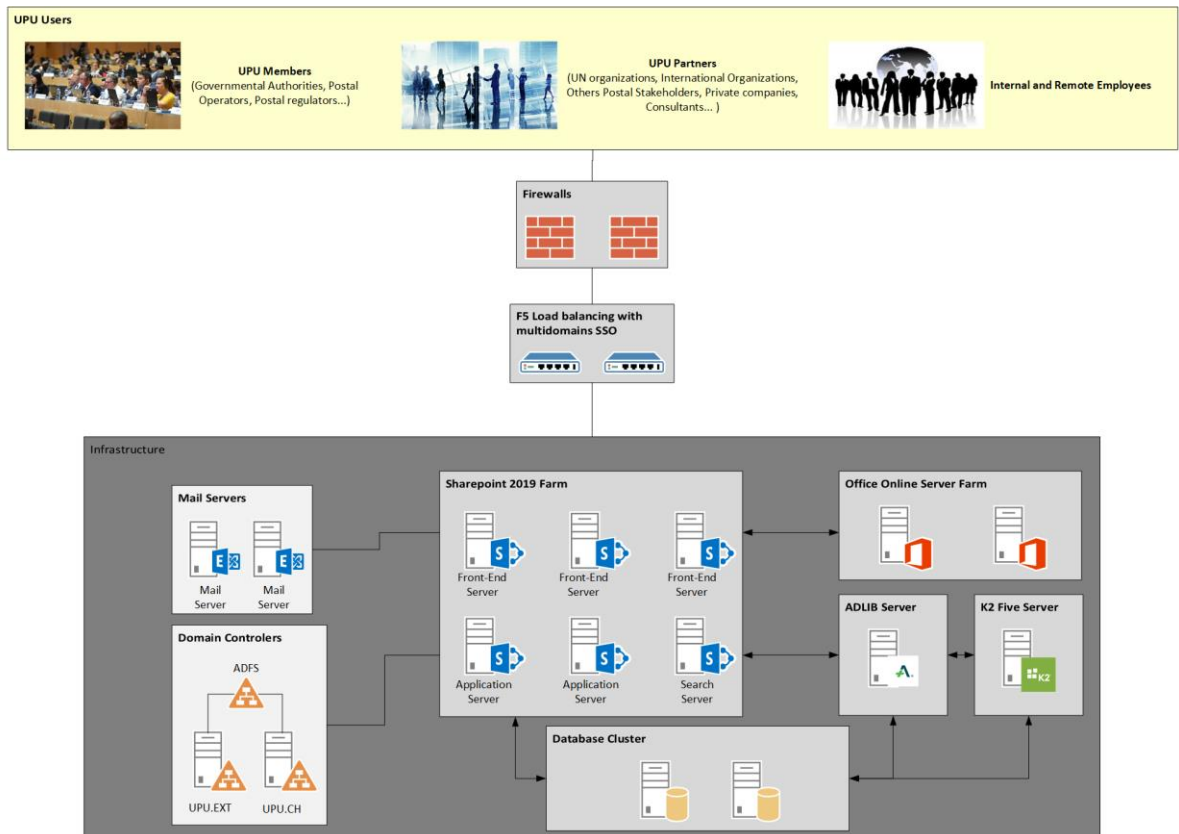
These SharePoint publishing sites will be setup and customized by the UPU. Document migration to the new structure will be completed by the UPU. Existing forms and processes used for the publication of UPU documents will be redeveloped by the UPU.

With this organization, UPU expects to:

1. get a better control of the growth of documents,
2. get a future-proof and more modular solution,
3. get ready for in-place archiving,
4. be more flexible for future changes and needs,
5. leverage native capabilities of SharePoint and K2.

4.4 Technical requirements

The new targeted topology :



The new architecture will rely on the following components:

- SharePoint 2019 on premises
- SQL Server 2019 with Always on cluster on premises
- Office Online Server 2019 on premises
- K2 5.4 farm
- Adlib Server 6.0
- ADFS with 2 ADs on trusted domains
- F5 for NLB and IDP
- Authentication SAML 1.0 & 2.0

The development environment will be installed and hosted by the UPU.

4.5 Security

The selected bidder will have to comply with internal rules as prescribed by the IT Security Management System (ISMS) and ISO 27001 standards. These rules are also applicable to subcontractors. User registration will be made using the Identity and Access Management system (Midpoint).

Requests for access will be done reusing SharePoint capabilities (Access Request Settings)

Security model definition and permissions management on solution artefacts (workflows, site, documents, PDOC requests...) are included in the scope and should comply with ISO 27001 practices

4.6 Estimated duration of the services

The services are scheduled to start by mid-January 2021 and expected to be 4-5 months in duration. Bidders shall clearly define any risks, constraints, and mitigation measures to be put in place to successfully conduct the Study, including mitigation mechanisms in the event travel is still restricted beyond January 2021 as a result of the ongoing COVID-19 pandemic.

Bidders shall outline a detailed project plan, by phases and deliverables, to deliver the Study. The timeline shall also include an appropriate project management mechanism.

4.7 *Project Plan and Deliverables*

Notwithstanding any interim documents, the project deliverables are:

- Source codes of the SharePoint and K2 Solutions.
- Deployment scripts and Solution installers
- Functional Specification document
- Technical specification document
- Deployment and maintenance manuals if applicable
- User manuals (Optional)
- Training Materials (Optional)

Bidders are expected to detail the process, timeline, how and when each deliverable will be prepared, as well as mechanisms to receive comments and approvals from the Steering Committee to finalize each deliverable.

The draft and final versions of the Study as well as the Pilot Project Concept Notes, shall be submitted to UPU in editable documents (MS Word or similar).

4.8 *Bidder requirements*

The UPU shall have the right to reject any bids that do not fulfil the requirements set out herein.

Bidders shall describe any relevant procedures pertaining to project handling and communication.

Bidders shall also confirm that their bids shall cover all costs for provision of the services referred to herein. Other costs to be incurred by the selected Vendor shall be subject to the prior written consent of the UPU. No other fees shall be paid, with the exception of reimbursement of other unavoidable costs incurred for successful completion of the services, equally subject to prior written consent of the UPU.

4.8 *Additional Information*

Bidders may include any additional information may deem necessary or relevant for a clear and detailed understanding by the UPU of the services being offered.