**REQUEST FOR PROPOSAL (RFP) FOR**

**MANAGED CLOUD HOSTING / INFRASTRUCTURE AS A SERVICE (IAAS)**

Project Reference: [xxx]

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# INTRODUCTION

[Example introduction] Anthony Martin Consultancy is a consultancy firm specialising in providing procurement support for FTSE 100 Companies in the UK. The company has 50 employees working across EMEA and we service global clients by applying our specialist knowledge to buying behaviour in different cultures and geographical locations.

**[Company] UK Facts and Figures:**

* Operate in 3 Locations London, Madrid and Paris
* More than 50 Associates
* Specialism in Procurement Business Transformation and Shared Services
* [insert more based on your organisations profile]
* [insert more based on your organisations profile]

# RFP TERMS OF REFERENCE

* 1. **Scope**

It is the intention of [INSERT COMPANY] to establish a contract with service providers for a complete and comprehensive offering of cloud hosting/IaaS Solutions. Respondents may elect to limit their proposals to a single product or service line within any category, however, respondents are encouraged to propose their complete catalog, products and services where available, including but not limited to the following:

Core Products and Services being requested:

* Public Cloud Providers - Ability to provision services and support from the top Public Services Providers (CSPs)
* Private Cloud hosting/IaaS - Ability to offer private cloud hosting/IaaS (hardware, licenses, support, and maintenance) and architect/build private cloud environments.
* Cloud Application Development - Ability to modernize/migrate legacy application as well as develop/deploy new applications on public and/or private clouds

Additional products, services and solutions include:

* Consultation and strategy development –consultation and assistance in the development of a Cloud Solution.
* Migration Services – secure virtual or physical server migration, databases, enterprise applications, and any other product or service that might require migration services for the deployment of a cloud hosting/IaaS solution.
* Managed Cloud Services - Ability to develop, integrate, optimize and support solutions running on public and/or private clouds
* Backup and Recovery Services – deployment and management of a backup and data recovery service.
* Virtual desktop solutions.
* Data and analytic solutions.
* Security for infrastructure, applications, API’s and other cloud-based security solutions.
* All other solutions related to the function and support of cloud hosting/IaaS and platform solutions.

Industry Standards:

Except as contained herein, the specifications or solutions for this RFP shall be those accepted guidelines set forth by the industry, as they are generally understood and accepted across the nation, such as ISO/IEC 27018.

Value Add/Other Services:

In addition, [INSERT COMPANY] requests any value-add commodity or service that could be provided under this contract.

* Out of Scope

*Where possible separate certain elements of the requirement into smaller sections (work packages) to make it clearer for the supplier understand your requirements. This will also help define a list of deliverables.*

*When drafting the scope of work discuss the requirement with colleagues, other users (internal/external stakeholders) and supply chain where necessary to aid you.*

*Consider the following points below when drafting*

* *List the most important elements of the requirement first and work through to the least important*
* *Use simple language, avoid using jargon;*
* *Define terms, symbols and acronyms;*
* *Do not embed requirements in background information - suppliers may miss them - keep requirements in their own sections;*
  1. **Project Objectives/Benefits**

*Provide an overview of the project objectives and benefits to enable the suppliers to understand where this work fits in with company’s objectives, if applicable.*

*Include the following;*

[Suggested text]

The company's objective for publishing the RFP is to attract proposals from qualified cloud hosting/IaaS suppliers who can provide the following:

* Robust and Scalable Infrastructure: The company requires a cloud hosting/IaaS that can support its current and future business needs, handle high volumes of data and traffic, and scale up or down as required.
* Security and Compliance: The company is looking for a supplier who can provide a secure cloud hosting/IaaS that meets industry-standard security and compliance regulations such as GDPR, HIPAA, PCI DSS, etc.
* Reliability and Availability: The company needs a supplier who can guarantee high levels of uptime, availability, and disaster recovery capabilities.
* Cost-Effectiveness: The company is looking for a supplier who can provide cost-effective cloud hosting/IaaS services that align with its budgetary constraints and provides a high return on investment.
* Technical Expertise and Support: The company requires a supplier who can provide technical expertise, training, and support to its IT team to ensure seamless migration, deployment, and maintenance of the cloud hosting/IaaS.

# RFP INSTRUCTION

RFP responses shall be submitted in accordance with the following instructions. It is important that all the information requested is provided in the format and order specified. If the Supplier does not provide all of the information [INSERT COMPANY] has requested within the RFP pack, [INSERT COMPANY] may reject the RFP response as non-compliant.

Suppliers must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their RFP response. Suppliers are solely responsible for any costs and expenses in connection with the preparation and submission of their RFP response, and all other stages of the selection and evaluation process. Under no circumstances will [INSERT COMPANY], or its advisors, be liable for any costs or expenses Suppliers, their sub-Suppliers, suppliers or advisors incur in this process, including if this RFP process is terminated or amended by [INSERT COMPANY].

Suppliers are solely responsible for obtaining the information that they consider is necessary in order to prepare the content of their RFP response and to undertake any investigations they consider necessary in order to verify any information [INSERT COMPANY] provides during the procurement process.

All pages of the RFP submission must be sequentially numbered (including any forms to be completed and returned).

At any time prior to the deadline for receipt of questions, [INSERT COMPANY] may modify the RFP documents by amendments in writing.

[INSERT COMPANY] (at its sole discretion) may extend the deadline for receipt of RFP responses.

[INSERT COMPANY] reserves the right to modify or to discontinue the whole of, or any part of, this RFP process at any time and accepts no obligation whatsoever to award a contract.

This is part of a restricted RFP and all Suppliers invited to respond to this RFP have passed the pre-qualification questionnaire to proceed to this current stage.

[INSERT COMPANY] will check each RFP response for completeness and compliance with the RFP instructions. [INSERT COMPANY] reserves the right to reject any RFP responses it considers substantially incomplete, or non-compliant (each RFP response will be assessed on its own merit, according to the level/importance of omitted or non-compliant content).

“[INSERT COMPANY]” means the contracting authority, seeking to invite suppliers to participate in the procurement process.

“You” or “Supplier” means the legal entity completing these questions, seeking to be invited to the next step of the RFP procurement process

Please ensure all questions are completed in full and in the format requested. Failure to do so may result in your submission being disqualified. If the question does not apply you need to clearly state N/A.

If it is necessary for you to provide additional information this should be provided as an appendix and clearly referenced as part of your declaration.

**[INSERT COMPANY] REPRESENTATIVE**

Your main point of contact is: xxxxxxxx: xyz@[insert company].co.uk

**[INSERT COMPANY] OVERVIEW**

If you wish to find out more about [INSERT COMPANY], please visit our website at www.[insert company].co.uk

* 1. **RFP Timelines**

The supplier’s response must be submitted within the e-sourcing tool by the date and time stated in the table below and in accordance with the format set out in Section 3.2. The e-sourcing tool will not allow Suppliers to submit proposals after this deadline and/or which do not conform to the RFP instructions. The [INSERT COMPANY] may vary the RFP timetable and communicate all amendments via the e-sourcing tool and may reject late or nonconformant submissions.

Supplier must download and populate the Q&A template for their questions which must be submitted by the date and time stated in the table below.

Please find in the table below the relevant due dates for this RFP process.

|  |  |  |  |
| --- | --- | --- | --- |
| **Due Date** | **Time** | **Action** | **Who** |
| [xx/xx/xxxx] | [xx:xx] | Distribution of RFP documents via the | [COMPANY] |
| [xx/xx/xxxx] | [xx:xx] | Participation in RFP confirmation / rejection (using template provided) | [SUPPLIER] |
| [xx/xx/xxxx] | [xx:xx] | **Deadline for submitting questions (using template provided)** | [SUPPLIER] |
| [xx/xx/xxxx] | [xx:xx] | Provision of answers to questions submitted by the supplier | [COMPANY] |
| [xx/xx/xxxx] | [xx:xx] | **Deadline for submitting responses** | [SUPPLIER] |
| [xx/xx/xxxx] | [xx:xx] | Invitation for presentation to selected suppliers | [COMPANY] |
| [xx/xx/xxxx] | [xx:xx] | Supplier presentations | [ALL] |
| [xx/xx/xxxx] | [xx:xx] | Selection of supplier(s) for RFP phase or further commercial discussions | [COMPANY] |

* 1. **RFP Structure**

This RFP overview consists of:

RFP Document: the overall purpose, target/objectives and scope of the RFP and a summary of the evaluation criteria and questions.

The “Response” documents will be replicated within the e-sourcing tool where the Supplier is required to submit their responses. The “Reference” documents are provided as additional information to support the RFP.

* Appendix 1a – Response Document: Company Details and Environmental
* Appendix 1b – Response Document: Financials
* Appendix 2 – Reference Document: Detailed Requirements/Specification
* Appendix 3 - Response Document: Supplier Capability Questionnaire
* Appendix 4 – Response Document: Pricing
* Appendix 5 – Reference Document: Job Role Definitions
* Appendix 6 - Response Document: Terms and Conditions (including template to be used by the supplier to submit indicative rates)
* Appendix 7 - Q&A Template: to be used by the supplier to submit questions

The Supplier may submit a PowerPoint proposal document to support their RFP submission, this must be no more than 15 slides including the title and contents slides.

* 1. **Communication and Contacts for this RFP**

Any communication with regard to this RFP must be directed only to the contacts listed below. Canvassing of other [THE CLIENT] personnel by the supplier may result in their exclusion from this RFP and potentially affects the consideration of the supplier for future RFP’s.

|  |  |
| --- | --- |
| **[THE COMPANY] Project Lead** | **[THE COMPANY] Representative** |
| Contact for any enquiries related to the subject of this RFP (i.e. business requirements, technical requirements, etc.) | Contact for any enquiries related to the RFP process or to commercial or contractual topics |
| [Project Manager Contact Details] | [Procurement Manager Contact Details] |

Although communication with the above listed contact is welcome, it shall be limited to requests for assistance regarding the RFP. Any questions regarding the evaluation of supplier’s proposal will not be answered.

* 1. **Supplier Contact**

[THE COMPANY] expects the supplier to indicate one individual as principal point of contact for the purposes of this RFP and sequent phases of the process. This individual will be required to have the authority to agree and / or negotiate the terms and conditions on behalf of supplier’s entire organization (e.g. pricing, contractual obligations, committing resources and agreeing timelines)

* 1. **Supplier Presentation**

After initial evaluation of the supplier’s submission, you may be requested to present an overview of your proposal, or certain aspects of the proposal.

The aim of these presentations is to support with further evaluation of the supplier's proposal. Please note, only a limited number of suppliers may be invited to participate in this stage. More details about the presentation, including logistics and a detailed agenda will be provided in advance.

* 1. **Disclaimers**

The supplier must perform its own evaluation of all information and data provided within this RFP and any [the Client] sequent RFP documents.

Whilst the information in this RFP and any [the Client] sequent phases has been prepared in good faith; it does not purport to be comprehensive. [THE CLIENT], nor any of its advisors accepts any liability or responsibility for its adequacy, accuracy or completeness. It is the sole responsibility of the supplier to determine the total work content for the submission.

[THE CLIENT] makes any commitments, implied or otherwise, that this process will result in a business transaction. The submission of a proposal in no way obligates [THE CLIENT] to disclose its reasons for accepting or rejecting the proposal. [THE CLIENT], therefore reserves the right, at any stage of this process to:

* discontinue the process and reject any or all proposals submitted without obligation or liability to any potential supplier,
* accept any proposal, not limited to the lowest priced proposal,
* award a contract on the basis of initial proposals received, without discussions or requests for best and final proposals,
* award to a supplier none, one or any combination of the services,
* not make an award at all,
* make awards for different parts of the scope at different times,
* accept all or part of the proposals,
* amend or clarify the requirements at any time prior to contract award,
* conduct an e-auction based on the initial proposals,
* re-launch a new RFP or RFP for new proposals.

[THE COMPANY] further reserves the right to:

* Share this RFP and any proposals submitted by the suppliers in response hereto with selected consultant / third parties of [THE COMPANY]’ choice supporting this process, these third-parties shall have signed effective Non-Disclosure Agreements (NDAs),
* Make copies of the proposals for purposes of evaluation.
  1. **Validity of Proposal**

The information submitted by the supplier’s proposal should be valid (i.e. not subject to material change) throughout the sourcing process for at least 12 months from the submission of it.

Please note any commercial terms agreed as an outcome of this RFP/RFP process must be valid for a minimum of [36 months] from contract signature.

* 1. **Use of Subcontractors**

Where the supplier intends to use a subcontractor, it shall provide the attached subcontractor questionnaire and an accompanying statement in its response explaining the role of that subcontractor

# HIGH LEVEL REQUIREMENTS

Overview of requirements

Detailed requirements are defined with Appendix 2

# CONDITIONS OF CONTRACT

Attached in Appendix 6 is the terms and conditions in relation to the proposed contract award.

**Qualification of the Contract**

Where Suppliers have any queries or concerns with any specific condition of the terms and conditions of the contract, these should be submitted in writing to shareditt@[insert company].co.uk as soon as possible, and in any case no later than 10 days prior to the deadline for submission of RFP responses.  Please ensure the specific condition(s) and proposed amendment(s) are provided.  These will be reviewed by [INSERT COMPANY] on a case by case basis, and, if accepted, revised terms and conditions will be issued to all Suppliers.  Failure to accept the terms and conditions of the contract or to qualify the RFP in any way, may result in the RFP being rejected by [INSERT COMPANY].

# CONFIDENTIALITY

Written information received from the other party regardless of it being marked or confidential or not and,

Oral or visual information identified as confidential or otherwise at the time of disclosure which is summarised in writing and provided to the other party in such written form promptly after such oral or visual disclosure.

Each party may use information received from the other party hereunder and may provide such information to its parent corporations, if applicable, and their respective employees for their use, only in connection with the evaluation and response to this RFP. Each party agrees that, for a period of five (5) years from receipt of information from the other party hereunder, such party shall adopt the same means it uses to protect its own confidential and proprietary information, but in any event, not less than reasonable means to prevent the disclosure and to protect the confidentiality of the information received.

The foregoing shall not prevent either party from disclosing Information which belongs to such party or is (i) already known by the recipient party without an obligation of confidentiality, (ii) already in the public domain, or becomes publicly known through no unauthorised act of the recipient party, (iii) rightfully received from a third party without obligation of confidentiality, (iv) independently developed by the recipient party without use of the other party’s Information, (v) disclosed without similar restrictions to a third party by the party owning the Information, (vi) approved by the other party for disclosure, or (vii) required to be disclosed pursuant to a requirement of a governmental agency or law so long as the disclosing party provides the other party with notice of such requirement prior to any such disclosure.

# EVALUATION OF RFP

This section sets out how the organisation intends to score submitted bids/proposals

**EVALUATION METHODOLOGY**

In the interests of an open, fair and transparent assessment, this document sets out how [INSERT COMPANY] intends to evaluate RFP responses. It outlines the evaluation criteria and respective weightings, as well as the evaluation methodology to be applied.

**EVALUATION PROCESS**

The process that will be used to select an appropriate Supplier and award the contract for this procurement is to check for suitability of the Supplier. If the Supplier does not conform to the minimum requirements RFP responses will not be marked.

It should be noted that pricing is only taken into consideration should the technical/quality evaluation result achieve the threshold. The minimum score is X.

An evaluation panel consisting of representatives of key stakeholders within [INSERT COMPANY] will carry out the evaluation. The procurement team will only act as a moderator during the suitability and proposal assessment phases of the evaluation.

**RFP EVALUATION CRITERIA AND MINIMUM REQUIREMENTS**

In evaluating RFP responses, the most economically advantageous RFP(s) will be sought. This will be using the evaluation criteria and weightings detailed in Appendix X.

The evaluation criteria specified but not limited to, that set out in Appendix X relate to the attached specification which details the minimum requirements. Therefore, any RFP response which cannot demonstrate that it meets any of the minimum requirements will not be marked and will automatically score zero.

Suppliers are advised to carefully consider the attached specifications, ask clarifying questions to ensure these are understood

Suitability Questions. Suppliers must pass all of the questions in this section for their RFP to be marked. A fail will automatically result in a non- compliant bid.

|  |  |
| --- | --- |
| **Grade** | **Definition of grade** |
| **5** | **Excellent.** The response significantly exceeds the specification requirement.   1. Addresses all aspects of the question in an informed and comprehensive manner. 2. Demonstrates a thorough understanding of what is being asked. 3. Provides evidence of how that understanding can be applied in practice. 4. Offers full confidence that the Supplier will deliver the service in full. 5. Addresses most areas of doubt and uncertainty; and 6. Provides certain, unambiguous commitments or statements of intent that permit reliance through translation into contractual terms. |
| **4** | **Good.** The response surpasses the specification requirement.   1. Addresses all aspects of the question and is generally of a good standard. 2. Demonstrates a good understanding of what is being asked. 3. Provides a worked-up methodical approach. 4. Offers confidence that the Supplier will deliver the service in full with limited areas of doubt or uncertainty. 5. Addresses key areas of doubt and uncertainty; and 6. Provides commitments that can be translated well into contractual terms. |
| **3** | **Meets Expectations**. The response is compliant.   1. Addresses most of the question and is generally of a good standard but lacks substance or detail in some areas. 2. Demonstrates an understanding of what is being asked. 3. Provides a satisfactory approach. 4. Offers a general level of confidence that the Supplier will deliver the service (but with room for doubt in some areas). 5. Address some areas of doubt and uncertainty; and 6. Provides some commitments that can be translated well into contractual terms. |
| **2** | **Fair.** The response is partially compliant.   1. Addresses some of the question but *either* lacks relevant information and detail *or* lacks substance in a manner that would suggest the response is a “model answer”. 2. Demonstrates some understanding but with a lack of clarity in key areas. 3. Provides an approach which is not wholly appropriate or viable orlacks evidence. 4. Shows that the level of confidence that the supplier can deliver does not outweigh the doubt. 5. Does not address many areas of doubt and uncertainty, and not offer sufficient commitment (with doubt as to the extent to which would translate into contractual terms) |
| **1** | **Poor.** The response is partially compliant, but with significant deficiencies.   1. Does not address the question or has omissions. 2. Lacks understanding in significant areas. 3. Provides an approach which has gaps or creates concerns. 4. Shows that the level of confidence that the supplier can deliver is low. 5. Creates uncertainty; and 6. Displays significant lack of commitment (with doubt as to the extent to which would translate into contractual terms) |
| **0** | **Unacceptable Response.**   1. Provides no response or omissions/oversights that prevent scoring. 2. Refuses to deliver the requirement; and 3. Creates concerns so significant that the response would be detrimental to the interests of the Department |

# RFP AWARD

The agreement will be awarded in its entirety defined by this RFP to the winning Supplier. To determine this, the Supplier with the highest combined price and quality score will be awarded the status of Preferred Supplier

|  |  |  |
| --- | --- | --- |
| **Award calculation** | | |
| Commercials | 60% | Pricing and contract evaluation |
| Service Capability | 30% |  |
| Contract Review – Ease of Business | 5% |  |
| Presentation | 5% |  |
|  | Total 100% |  |

# RFP DECLARATION

This section outlines how the offer from the Supplier is to be constructed. Please return this RFP Declaration along with your RFP response and retain a copy for your records.

Having examined the RFP email, the Instructions to Suppliers, the Information Required From Suppliers, the Conditions of Contract, the Specification and this Form of RFP (the “RFP Documents”), we offer to supply all/part of (delete as applicable) the goods, services or works specified in these RFP Documents.

We undertake if selected, to perform the contract in accordance with the RFP Documents, including the Conditions of Contract contained herein.

We agree that this RFP shall remain open for acceptance by [INSERT COMPANY] for 180 days from the date stipulated for the return of RFP responses.

We understand that you are not bound to accept the lowest, or any RFP you may receive.

We certify that this is a bona fide RFP, and that we have not fixed or adjusted the amount of the RFP by or under or in accordance with any agreement or arrangement with any other person. We also certify that we have not done and we undertake that we will not do, at any time before the hour and date specified for the return of this RFP, any of the following acts:

Communicate to a person, other than the person calling for the RFP responses, the amount or approximate amount of the proposed RFP. Except where the disclosure, in confidence, of the approximate amount of the RFP was necessary to obtain insurance premium quotations required for the preparation of the RFP.

Enter into an agreement or arrangement with any other person that he/she/they shall refrain from responding or as to the amount of any RFP to be submitted.

Offer or pay or give or agree to pay or give, any sum of money or valuable conside ration directly or indirectly to any person, for doing or having done or causing or having caused to be done, in relation to any other RFP or proposed RFP for the said goods, services or works, any act or thing of the sort described herein.

We recognise that [INSERT COMPANY] reserves the right to clarify details of our offer prior to the award of any contract.

We hereby undertake that the period during which this RFP remains open for acceptance not to divulge to any persons, other than the persons to whom the RFP is to be submitted, any information relating to the submission of this RFP or the details contained therein except where such is necessary for the purpose of submission of this RFP.

We have included the following in our response:

1. Completed response to the specification of requirement in the format requested.
2. Completed pricing schedule including separate breakdown of costs
3. Completed RFP declaration (this form)
4. In the unlikely event that any amendments are requested to the proposed terms and conditions, a completed copy of the request for qualification to contract detailing requested amendments

***Supplier’s authorised representative signature…….........................................***

***Legal name of organisation: ..............................................................................***

***Company registration number:* ..........................................................................**

***Full business address:***

***..........................................................................................................................***

***..........................................................................................................................***

***.........................................................................................................................***

# CONFLICTS OF INTEREST

**Suppliers have a continuing duty to disclose actual or potential conflicts of interest in respect of itself, its named sub-Suppliers and / or consortia members.**

**Please describe any (potential) conflicts of interest that the Supplier has identified and how these will be managed\*:**

If you **DO** **NOT** have any conflicts to declare, please tick this box: **☐**

Suppliers are reminded that failure to identify material conflicts of interest may lead to rejection of its RFP response.

*Guidance to Suppliers:*

*Suppliers should describe in the detail the perceived conflict (how it could be perceived in the context of this procurement) and the measures it will take to mitigate the conflict through the procurement life-cycle and service delivery.*

# FORM OF RFP

**DECLARATION PROPOSAL FOR THE PROVISION OF [INSERT NAME OF RFP]**

Having examined the proposed Contract comprising of:

1. The Specification
2. The Pricing Schedule
3. The Evaluation Criteria
4. The RFP Response

As enclosed in the RFP response dated (**INSERT DATE**). We do hereby respond against the requirements, and terms and conditions of the proposed Contract.

We undertake to keep the RFP open for acceptance by [INSERT COMPANY] for a period of ninety (90) days from the deadline for receipt of RFP responses.

The contract value for our submission for the period of [insert total months/years] is £[insert amount]

We declare that this is a bona fide RFP, intended to be genuinely competitive, and that we have not fixed or adjusted the amount of the RFP by, or under, or in accordance with, any agreement or arrangement with any other person. We further declare that we have not done, and we undertake that we will not do, any of the following acts prior to award of this Contract:

1. Collude with any third party to fix the price of any number of RFP responses for this Contract;
2. Offer, pay, or agree to pay any sum of money or consideration directly or indirectly to any person for doing, having done, or promising to be done, any act or thing of the sort described herein and above.

Unless and until the Supplier and [INSERT COMPANY] have executed a formal agreement, [INSERT COMPANY] acceptance of this RFP with all its enclosures shall not constitute a binding contract between us. We understand that you are not bound to accept the lowest price, or any, RFP.

Name of person duly authorised to sign RFP responses:

Date: ..........................................

Signed: ..........................................

in the capacity of: ................................................................

duly authorised to sign RFP responses for and on behalf of:

............................................................................

By completing this Declaration and submitting your RFP response, you have agreed that the statements in this Form of RFP

# APPENDIX 1 – COMPANY DETAILS AND FINANCIALS

[Embed:

Appendix 1a - Response Document: Business and Environmental

Appendix 1b - Response Document: Financials]

# APPENDIX 2 – DETAILED REQUIREMENTS/SPECIFICATION

1. **Project Summary**

*Provide a description of the business and technical objectives without including the specific requirements.*

1. **Background**
   1. Purpose

*Provide one or a few sentences to specify, at a high level, what this SOW is to address / achieve. Include the service model(s) that applies (IaaS, PaaS, SaaS, or a mix).*

* 1. Assumptions

*Specify any assumptions here. Input “N/A” if not applicable.*

* 1. Current Environment

*Provide a brief, high-level description of your organization’s current environment and a diagram, if available. Examples of current environment factors are listed below:*

* Servers and / or Virtual Instances for:
  + Applications
  + Databases
  + Web Hosting
  + Load Balancing
  + Redundancy, Mirroring and High Availability
  + Production, Development and Test Environments
* Storage Systems
  + SAN – Storage Area Network
  + NAS – Network-Attached Storage
  + Backup Storage
  + Archival Storage
* Networks
  + Wide-Area Network Details and Sizing
  + System Interfaces and Network Boundaries
  + Number of Users
  + Transactional Traffic, such as Web Transactions, Database Transactions or Application Transactions
  + Network Security, such as Firewalls, Secure File Transfer or VPN
* Server Operating Systems
  + System Administration
  + Version
* Databases
  + Database Administration
  + Licensing
  + Version
  + Relational or Non-Relational
* Middleware

1. **Deliverables**
   1. List of deliverables, outputs and reports the Supplier is to supply:

* [Insert deliverables specific to the project]
  1. Information requirements:
* Management Information reports on activity (as specified under Supplier Responsibilities)
* Contract review annually

1. **Proposed Environment**

Provide a detailed description of the proposed environment using the same criteria as in the Current Environment and include an architectural diagram for reference.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Servers** | **Qty** | **Production** | **Qty** | **Development** | **Qty** | **Test** |
| Application |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |
| Database |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |
| Web Hosting |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |
| Communications (ie, SFT) |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |  | *Server XX – CPU’s, RAM, Storage* |
|  |  |  |  |  |  |  |
| **Storage Systems** | **Capacity** | **Production** | **Capacity** | **Development** | **Capacity** | **Test** |
| SAN (GB or TB) |  |  |  |  |  |  |
| NAS (GB or TB) |  |  |  |  |  |  |
| Back-up (GB or TB) |  |  |  |  |  |  |
| Archive (GB or TB) |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Network** | **Country Location** | **City Location** | **Country Destination** | **City Destination** | **Bandwidth** | **Network Link Qty** |
| Transport *(ie, Dedicated, Internet, TIC, or None)* |  |  |  |  |  |  |
| Bandwidth (MB or GB) |  |  |  |  |  |  |
| Redundancy |  |  |  |  |  |  |
| Internet Gateway |  |  |  |  |  |  |
| Layer 3 Switching |  |  |  |  |  |  |
| Secure File Transfer |  |  |  |  |  |  |
| Security |  |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Security Tools/Services** | **Qty/Size/Throughput** | **Notes** |
| Security Information and Event Management (SIEM) |  |  |
| Security Orchestration, Automation and Response (SOAR) |  |  |
| Intrusion Prevention System (IPS) & Intrusion Detection System (IDS) |  |  |
| Next-Generation Firewall (NGFW) |  |  |
| Privileged Identity Management & Privileged Access Management PIM/PAM |  |  |
| Cloud Web Application Firewall WAF |  |  |
| Data Loss Prevention DLP (Network + Endpoint+Servers) |  |  |
| Data Classification |  |  |
| Web Proxy |  |  |
| Endpoint Detection & Response EDR (for Endpoints) |  |  |
| Server Security (AV for servers) |  |  |
| Cloud Sandboxing |  |  |
| Cloud DDoS |  |  |
| Software VPN |  |  |
| Site-to-Site IPSEC |  |  |

1. **Other Requirements**

In addition to the cloud hosting/IaaS requirements, include requirements for the following functions and professional services.

* 1. Other Requirements

*In addition to the cloud hosting/IaaS technical requirements, include requirements for the following functions and professional services*

* 1. Backup Systems and Capability

*Backup capability refers to the ability to recover and restore the system and data from a failure or loss situation. This would include:*

* Backup Contents
  + *Applications – (i.e., 45 GB full, 1GB daily incremental)*
  + *Data – (i.e., 100 TB full, 50 GB daily incremental) (if running multiple applications, may want to list Data by application)*
  + *Other – (i.e., web pages, 100 GB full, 1GB daily incremental)*

* Backup Retention Period and Archiving
  + *The required length of time backups will be retained*
  + *Offsite archiving requirements*
* Recovery Time Objective (RTO)
* The required length of time for backup restoration *(for example):*
  + *24 hours for production environment*
  + *72 hours for development and test environments*
* Recovery Point Objective (RPO)
  + *The maximum length of time between backups*
* Snapshot Capability
  + *Identify whether or not snapshot capability is required. This refers to the customer having the ability to make an on-demand copy of the system / data, such as before doing a system upgrade or data migration**.*

1. **Scaling of Resources**

Provide projections of resource increases/decreases for the next 3-5 years, as needed, to support any periods of unpredictable high/low usage. Scalable resources include but are not limited to:

* Bandwidth
* Servers
* Storage
* Database instances
* Other

1. **System Usage**

For the target throughput of the system, include users and anticipated users from all groups in the numbers. If the system has multiple applications, create a table for each application.

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** | **Current** | **Growth** | **Growth Timeframe** |
| Number of Users: Peak Time |  |  |  |
| Number of Users: Average Time |  |  |  |
| Amount of Bandwidth: Peak Time |  |  |  |
| Amount of Bandwidth: Average Time |  |  |  |
| Number of Transactions: Peak Time |  |  |  |
| Number of Transactions: Average Time |  |  |  |

1. **System Availability**

The Supplier shall provide a cloud environment to be available [xx.xx]% or greater per month.

1. **Service Level Agreements (SLAs)**

Define the SLAs you require the Supplier to meet and specify the service credits to be levied if the SLAs are not met.

1. **Key Performance Indicators**

**[**Insert KPI’s use the supplier day to help you prepare KPI’s if you are unsure about what to request]

1. **Help Desk Support**

State requirements for Help Desk support

The help desk shall be available and provide the following levels of support:

* 24x7x365
* Production environment 15 minutes to 2 hours maximum time to acknowledge for Priority 1 severity, and for mean time to resolve.

1. **Project Milestones & Deliverables**

*A project milestone is the end of a stage that marks the completion of a work package or phase, which eventually makes up a project deliverable.*

*Use Milestones with clear deliverables to help structure the management of the project.*

*Think about what the final deliverable should look like, how it should be presented and in what format etc.*

*Consider if the project deliverable or output is a tangible or intangible object produced as a result of the project that is intended to be delivered to [INSERT COMPANY], for example a report, a document, a DVD/Website etc.*

*For larger projects, it may be easier to break the project down into stages using key deliverables as project milestones.*

*The payment schedule should be linked to key milestones/deliverables – this will allow you to evaluate if the amount of work (effort) and associated costs proposed by the Suppliers are reasonable*.

1. **Contract Monitoring Information**

The Supplier will be required to:

Monitor the quality of the service provision to ensure Company satisfaction in accordance with the key performance indicators outlined in the Contract, unless otherwise approved by the Company; [Amend the requirement as required depending on whether if it’s a short term project or a term contract]

* Provide a report on progress in delivering the requirement to the Project Manager on a regular basis, at least quarterly;
* The Supplier will be required to attend meetings on site to review progress and discuss the service, as required by the Company
* The Supplier is invited to propose additional management information to monitor performance under this contract.
* Attend a post contract review with the Company to review whether the objectives of the contract were met, to review the benefits achieved and to identify any lessons learnt for future projects.

1. **Meetings**

Frequency of contract management meetings:

* [insert monthly or quarterly],

1. **Remedies/Service Credits**

Remedies for below par performance:

Performance will be monitored as part of routine contact compliance and reviewed by [INSERT COMPANY]. Remedial action will be followed through and monitored according to a plan agreed by the [INSERT COMPANY] Contract Manager and the Supplier’s Contract Manager.

# APPENDIX 3 - RESPONSE DOCUMENT: SUPPLIER QUESTIONNAIRE

[Embed Supplier Questionnaire]

# APPENDIX 4 – RESPONSE DOCUMENT: PRICING

[Embed Pricing Template]

# APPENDIX 5 – JOB ROLE DEFINITIONS

[Embed Specification Checklist]

# APPENDIX 6 - RESPONSE DOCUMENT: TERMS AND CONDITIONS

[Embed Terms and Conditions]

# APPENDIX 7 - Q&A TEMPLATE: TO BE USED BY THE SUPPLIER TO SUBMIT QUESTIONS

[Embed Q&A Template]