



## **Request for Quotation (RFQ) For an Document Management System**

Ref NO. GCF RFQ 2016/005

Date: 20 June 2016

GCF is accepting quotations from firms for the procurement of a Document Management System as per attached specifications and scope. All interested parties must complete and return Annex B along with the quotation to the following:

Reference RFQ 2016/005

Green Climate Fund  
Attn: Procurement Specialist  
175, Art Center-daero, Yeonsu-gu, Incheon 22004  
REPUBLIC OF KOREA

E-mail: [procurement@gcfund.org](mailto:procurement@gcfund.org)



## 1 RFQ Details

- 1.1. The purpose of this RFQ is to select a suitable vendor to provide, install and implement a Document Management System software for the needs of the Office of General Counsel of the Green Climate Fund in accordance with the Terms of Reference (TOR) attached (Annex A).

## 2 Currency

- 2.1. All prices shall be quoted in US Dollars (USD).

## 3 Evaluation

- 3.1. Evaluation will be based on the technical compliance and functional and financial criteria. Compliance and evaluation criteria is attached in Annex C.

## 4 Award Criteria

- 4.1. GCF shall award the Contract to the Bidder whose bid has been determined to be technically compliant, best scoring quotation, based on the Evaluation and Compliance criteria (Annex C).

## 5 Signing of the Contract

- 5.1. GCF shall send the successful Bidder(s) an engagement letter, which constitutes the Notification of Award. The successful Bidder shall sign and date the engagement letter, and return it to GCF within 5 days of the receipt.

## 6 Quotations Due

- 6.1. Bidders are responsible for the timely return of their quotation, no later than 18 July 2016 15:00 KST. All quotations must be sealed and received by the deadline and to address below:

Green Climate Fund  
Attn: Procurement Specialist  
11 Floor, 175, Art Center-daero, Yeonsu-gu, Incheon 22004  
REPUBLIC OF KOREA

or sent as an e-mail attachment to [procurement@gcfund.org](mailto:procurement@gcfund.org) with "Reference RFQ 2016/005" in the e-mail subject line.

- 6.2. Quotations submitted shall be binding and valid for a period of sixty (60) days from the due date stated herein. Any prices accepted during this period will be considered firm/fixed for the resulting services.



## 7 Clarifications

- 7.1. Firms with questions or requests for clarification are encouraged to send questions by e-mail to the address below promptly to allow time for the provision of a written response.

E-mail: [procurement@gcfund.org](mailto:procurement@gcfund.org)

## 8 Quotation Form (Annex B)

- 8.1. The attached Quotation Form must be completed and signed. Firms shall return the completed and signed Quotation Form with their quotation.

## Annex A (TOR for a Document Management System)

### 1 Introduction

- 1.1. The Green Climate Fund (the “GCF”) was established in December 2010 with the purpose of making a significant and ambitious contribution to the global efforts towards attaining the goals set by the international community to combat climate change. In the context of sustainable development, the GCF will promote a paradigm shift towards low-emission and climate-resilient development pathways by providing support to developing countries to limit or reduce their greenhouse gas emissions and to adapt to the impacts of climate change.
- 1.2. The GCF was designated as an operating entity of the financial mechanism of the United Nations Framework Convention on Climate Change (“UNFCCC”). It is governed and supervised by a Board that has responsibility for funding decisions pursuant to the Governing Instrument for the Green Climate Fund. It is supported by an independent Secretariat, accountable to the Board, having management capabilities to execute day-to-day operations of the GCF, providing administrative, legal and financial expertise. The GCF’s headquarters are located in Songdo, Incheon City, Republic of Korea.

### 2. Objective of the assignment

- 2.1. The objective of this procurement is to contract for provision and implementation of the Document Management System (DMS) software solution, typically used by the law firms, for the needs of GCF’s Office of the General Counsel (OGC).

### 3. Scope and focus of the assignment

- 3.1. The DMS provider will provide software and services for electronic documents storing, automatic numbering, categorisation, indexing, search, retrieval, versioning and authorised access, to the GCF’s Office of the General Counsel.
- 3.2. Services will include:
  - a) Installation of the DMS software components at the GCF’s Azure cloud and on client computers;
  - b) Content analysis and taxonomy design;
  - c) Configuration of the DMS software components to match the OGC’s document handling practice;
  - d) Migration of the existing OGC’s document files to the new DMS;
  - e) Users’ training and
  - f) Users’ support.
- 3.3. Software required:
  - g) Document Management System software installation media;
  - h) Licenses/subscription for 20 users and
  - i) User’s manuals/help and technical documentation files.

### 4. Duration

- 4.1. Items listed from 3.2) (a) to (e) are requested as a one-off service at the time of the DMS implementation. Service item 3.2(f) is requested for the entire duration of the license/subscription period of validity.





## Annex C (Evaluation and Compliance Criteria)

### 1. Functional and Technical Evaluation

An evaluation committee will be established to evaluate each proposal, based on the functional and technical criteria presented in the table below:

Functional Criteria		Score (1-5)
1	Automatic unique document numbering capability.	
2	Automatic unique folder numbering (including at sub-folder level) with ability to create new top level folders when working on new matters.	
3	Prompting to save files on DMS repository.	
4	Capturing the hard copies of the documents from scanners, with OCR capability.	
5	Keeping electronic documents in a non-proprietary and native format.	
6	Capability of applying multiple taxonomies or categorizations to a document or folder that allow documents to be classified and stored in more than one way from a "single instance".	
7	Ability to keep multiple versions of the same document with an optional filter to see only the latest (major) versions in the folder/library.	
8	Ability to track authors of different versions.	
9	Ability to run comparisons between different versions of the same document without saving it on the local drive.	
10	Ability to track who has accessed, viewed, emailed documents, and the reasons (included by the author) why a new version was saved.	
11	Full text search capability, using keywords and phrases with sorting by relevance.	
12	Provide secure ways to share stored documents with authorised external parties in user-friendly manner.	
13	Ability to share links to the stored documents instead of the attachments in the e-mails. <i>(optional)</i>	
14	Ability to file e-mails and attachments from Outlook folders to the DMS folders/libraries, directly from Outlook.	
15	Ability to automatically save outgoing e-mails to the DMS folders/libraries from Outlook.	
16	Ability to deeply integrate with Office 365 suite allowing: access to the DMS folders/libraries like on the local drive and automated meta data capturing and inheritance.	
17	Ability to work off-line with files stored in the DMS.	



Technical Compliance Criteria <sup>1</sup>		Compliant (Yes/No)
18	DMS can be hosted on Microsoft Azure cloud.	
19	DMS is compatible with Windows 8 and higher versions.	
20	DMS is compatible with Microsoft Office 365 ProPlus products (64 bit).	
21	DMS can be integrated with the Azure Active Directory for single sign-on capability.	

Score description:

- 1 - Not supported – Functionality does not exist or isn’t applicable in its existing form.
- 2 - Satisfactory – Functionality exists and it is applicable with major workarounds.
- 3 - Good – Functionality exists and is applicable with minor workarounds.
- 4 - Very good – Functionality exists and is fully applicable as is.
- 5 - Excellent – Functionality is applicable and significantly improves the work efficiency.

Proposed solution must score at least 60 out of 85 points at the Functional evaluation and has to meet all the Technical Compliance Criteria in order to be eligible for further evaluation.

## 2. Financial Evaluation

Financial evaluation will be performed by the GCF Procurement unit by the following method:

The lowest evaluated Financial Proposal (Fm) is given the maximum financial score (Sf) of 100. The formula for determining the financial scores (Sf) of all other Proposals is calculated as following:

$Sf = 100 \times Fm / F$ , in which “Sf” is the financial score, “Fm” is the lowest price, and “F” is the price of the proposal under consideration.

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<sup>1</sup> Proposed solution must meet all Technical compliance criteria to pass the evaluation.