



وزارة الاقتصاد
الرقمي والريادة

Ministry OF Digital Economy and Entrepreneurship

Pre-Qualification

For

Integrated Tax Administration System

Submission Deadline: 5/8/2024

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Introduction

Ministry of Digital Economy and Entrepreneurship (MoDEE) is soliciting proposals for Pre-Qualification from local qualified bidders alone or having joint venture (maximum 3 members) with national or international firm and invites international bidders in joint venture with Jordanian firms to provide Income & Sales Tax Department (ISTD) with an Integrated Tax Administration System (ITAS).

Bidders responding to this Pre-Qualification Document should demonstrate up-to-date capabilities and experience in providing similar services and similar engagements of the same scope, size, and nature.

Pre-Qualification will be processed in reference to the requirements of the Government Procurement By-Law No8 of 2022 and on 2 stages:

Stage 1

- Bidders are required to submit technical proposal for Pre-Qualification without prices, in addition, they are requested to provide list of features & functionalities for the proposed ITAS.
- In the first stage, the procurement committee may negotiate any of the bidders or all of them to understand the proposals or determine the changes required to make them acceptable, and to explore the bidders' desire to make such changes.
- The procurement committee may reject offers that do not meet the basic requirements, the required minimum performance, or the required implementation period.
- Only the companies that have passed the Pre-Qualification step will be invited to submit their technical and financial offers for the implementation of the project.

Stage 2

- Qualified bidders based on the qualification mark approved by the Special Tendering Committee in the first stage to submit their technical and financial offers based on the announced purchase documents, and in accordance with the stated conditions along with the obligation to submit bid entry insurance.
- At least two bids must remain from those not included in the rejection. If one bidder submits from among those who passed the first phase, the procurement procedures may continue.

Project's Scope of Work

The Bidder must provide Integrated Tax Administration System that covers all needed Functional and Technical Requirement. A packaged solution with successful implementation is preferred, bringing the best practices in the tax systems, in order to minimize risks for system implementation and support.

The project includes the provision of the following services:

- Definition of the functionalities and business processes to be supported by the new system.
- Development of the operational requirements, system and software architecture, data model, information flow and external interfaces.
- Preparation of the requirements for the acquisition of the system's software and hardware.
- Preparation of analysis, development and implementation activities.
- Perform all development (customization, new development) activities in accordance with the results of the analysis.
- Develop and implement testing plan.
- Deployment of the developed system in the pilot offices.
- Develop and implement a detailed data migration plan.
- Develop and implement a comprehensive training plan for the end users, IT team and the management.
- Roll-out the system nationally and in the Disaster Recovery locations.
- Provide Maintenance and Technical Support services after a successful implementation of the system.

ITAS Services and Functions

ISTD provides a broad range of services and functions related to their tasks. It can be anything from pure dispersion of information, via different types of guidance services, which often include a dialogue between ISTD staff and users, to different types of transactional services. These types of services are relevant to channel strategy discussions since some channels may be more suitable than others for providing different types of services, and the users, citizens, and organizations, may have different channel preferences, based on who they are and which service they require. The transaction services are the "core business" of ISTD, and the information and interaction services are services supporting the transaction services.

ITAS must enable ISTD to approach the services in a structured way, and which is of relevance to channel use and users, the following categorization may be considered:

- Information services
- Interaction services
- Transaction services

ITAS Functional Requirements

ITAS should provide the following Functional Requirements:

- Taxpayer e-Services Management
- Registrations Management
- Returns and Declarations
- Payments
- Compliance and Audit
- Enforcement
- Legal, Appeals and Courts
- Information and Deductions
- Customer Relationship Management
- Refunds
- Dashboard and Reporting
- BI and Analytics

Additional Requirements

- The system must be hosted on Government Private Cloud
- Data Migration from old systems to the new system

Pre-Qualification

1. Proposal Submission

Bidder/Joint Venture applying to pre-qualification for this bid is required to submit the technical offer in a sealed envelope that includes all the information and documents related to the evaluation and clearly written on the envelope (the technical offer), the name of the bidder / Joint Venture and the name and number of the pre-qualification, so that the technical offer includes the required information and data as It is shown below and filling out all the attached evaluation forms.

2. Technical Qualification

The technical proposal submitted by the bidder / Joint Venture will be evaluated as follows:

2.1. Bidder / Joint Venture expertise in similar projects during the last five years:

The bidder / Joint Venture is required to indicate the name of each of the specialized projects similar to the proposed project implemented and completed during the last 7 years, and in the case of coalitions or partnerships, the percentage of implementation of each partner in the project(s), indicating the bid number and the project owner and the address clearly, the assignment value, the date of commencement, the contractual implementation period, the final implementation period, the date of completion and the value of the final works, in addition to brief description of the components of the project and the changes and modifications that occurred to it during the implementation phase is shown according to the Bidder / Joint Venture Expertise Form.

The company should also clarify its experiences in the following:

- Experience in information technology (hardware and software)
- Experience in information security
- Experience in transferring knowledge and training
- Experience in technical support and maintenance
- Experience in standards and development of terminal services

In addition to the above, the bidder / Joint Venture is required to provide the certificates issued by the employer, including all information related to the project, and must be submitted with the technical proposal, signed by the employer and duly authenticated.

Notes:

- In the case of Joint Venture, the experiences of both parties to the Joint Venture must be presented according to Bidder / Joint Venture Expertise Form.
- Any offer that does not contain such documents will not be considered and will be excluded from qualification, and in the event of false or inaccurate information is provided the offer will be excluded.
- The mentioned projects are required to be fully completed and received, in which performance certificates have been issued by the employer and duly authenticated.

2.2. Staff Qualification:

The team should be composed of the following titles besides any specialty as per the project requirements – Bidder must propose separate and dedicated CVs for each role and highlight their relevant experience to the scope of the project:

- Project Manager – Minimum one Resource with minimum 15 Years of Experience with at least PMP Certificate (or equivalent).

- Solution Architect: Minimum 2 resources with minimum 5 years of experience.
- System Engineers: Minimum 3 resources with minimum 5 years of experience.
- Technical Consultant: Minimum one resource with minimum 7 years of experience.
- Tax Specialist: Minimum 3 Resources with Minimum 10 years of experience.
- Change management specialist: one resource with 7 years' experience.
- DBA: Minimum 2 resources with a minimum of 10 years of experience.
- System/Business Analyst: Minimum 2 resources with Minimum 10 years' experience.
- Quality Engineers: Min one resource with Min 10 years' experience.
- Training Specialist: Min one resource with Min 5 years of experience.

3. Financial Position:

Bidder / head of the Joint Venture is required to indicate in its technical offer its financial position by attaching the following:

- An original recent certificate/letter of Good Standing from the approved bank/Entity stating the good dealings of the company / Joint Venture.
- An original recent certificate from the approved bank (s) indicating that the bank approved by the company / one of the Joint Venture members is willing to provide the company with Guarantee of entry into the bid, Performance Bond, and advance payment guarantee total of (2.5) million Jordanian dinars (estimated).
- The Audited Financial Statements for the company/ Joint Venture for the last three years (2021, 2022, 2023), showing positive financial statements for at least 2 years including 2023.

4. Certificates of good Performance:

It is necessary to submit certificates attested by the employers that the bidder/Joint Venture has implemented similar projects in the last 7 years indicating its good performance.

5. Principles of Technical Qualification:

- Only the bidders / Joint Ventures that have passed the technical qualification principles under this document will be invited to submit their technical and financial proposals for the implementation of the project.
- The attached technical evaluation forms are to be completed and submitted along with the required documents.
- In the event of applying for pre-qualification as a Joint Venture, a preliminary Joint Venture agreement signed by the combined parties must be submitted according to the approved attached form.

Qualification Matrix

Qualifications	Requirements	Evaluation Criteria
Experiences in tax systems projects that are similar to the nature and size of the project during the last 5 years (Minimum One Accomplished Project)	Please refer to section 2.1 Bidder / Joint Venture expertise in similar projects during the last seven years	Not having a Project completion letter will lead to disqualification.
Experience in implementing data migration for sensitive financial historical data for governmental agencies during the last 5 years (Minimum One Accomplished Project).	Completion letter from the business owner stating the successful implementation of the migration.	Not having a letter will lead to disqualification.
List of countries in which the proposed system has been implemented	Attach a list of the names of countries in which the system has been implemented and still in operation.	the proposed system must be implemented and still in operation at least once, if not then will lead to disqualification
Staff Qualifications	Please refer to section 2.2 Staff Qualification	Proposal should show the proposed CVs, mentioned in section 2.2
The record of resorting to arbitration and judiciary to resolve disputes with the owners of the implemented projects/Tenders.	Attaching original documents proving that there is no reference to resorting to arbitration and the judiciary to settle disputes between the company and the owners of projects implemented by it during the last 10 years.	Proposal should show the required record(s)
Financial Position	Please refer to section 3 Financial Position	should provide all needed requirements Proposal showed show all requirements mentioned with this section.

Forms

Bidder / Joint Venture Expertise Form

Project Name	Project Owner	Project Actual Value	Contractual Project Period	Actual Completion Date	Delays and Causes

- Bidder / Joint Venture are responsible for any inaccurate information.
- The Bidder / Joint Venture are requested to provide all needed documents to prove all information stated within these forms, otherwise proposal will not be considered.

Name:

Signature:

JOINT VENTURE AGREEMENT

اتفاقية ائتلاف

It is agreed on this day..... of..... between:-

تم الاتفاق في هذا اليوم الموافق / / 2020 فيما بين :

..... Represented by Mr.

..... ويمثلها السيد

..... Represented by Mr.

..... ويمثلها السيد

..... Represented by Mr.

..... ويمثلها السيد

1- To form a joint - venture to execute the works specified in the Contract of the Central Tender No. (/) which was signed or to be signed with the Employer.

1- على تشكيل ائتلاف فيما بينهم لتنفيذ أعمال لعطاء رقم (/) المتعلق ب..... المبرم أو الذي سوف يبرم مع صاحب العمل.

2- All parties of the J/V shall be obliged to perform all works agreed upon with the employer which are specified in the tender contract, and they are jointly and severally responsible for all works related to tender no. (/) and the contract pertaining thereto. Should one party fails or delays to perform its obligations either partially or totally, it shall be the responsibility of all other parties jointly and severally without reservation to execute all obligations set under the contract with the Employer to the same standards specified by the contract .

2- يلتزم جميع أطراف الائتلاف بإنجاز جميع الأشغال المتفق عليها مع صاحب العمل والمنصوص عليها في عقد العطاء ويكونون متضامنين ومتكافلين في مسؤولياتهم نحو صاحب العمل فيما يخص كافة الأشغال المتعلقة بالعطاء رقم (/) والعقد الخاص به. وفي حالة تخلف أو تأخر أحد أطراف الائتلاف عن إنجاز المسؤوليات المناط به تنفيذها جزئياً أو كلياً يلتزم بقية الأطراف مجتمعين و / أو منفردين دون تحفظ بإنجاز جميع الالتزامات المحددة بالعقد الموقع مع صاحب العمل بالشكل المتفق عليه في العقد.

3- The parties to the J/V nominate as leader of the J/V . Any

3- يعين أطراف الائتلاف رئيساً للائتلاف لإدارة العطاء رقم (/) ، وأي مراسلات تتم بين صاحب العمل والائتلاف توجه إليه .

4- يسمي أطراف الائتلاف السيد..... ممثلاً لرئيس الائتلاف وهو مفوضاً بالتوقيع نيابة عن الائتلاف على كافة الأوراق والعقود الخاصة بالعطاء رقم (/) ويتمثيل الائتلاف أمام

<p>correspondence between the Employer and the parties to the J/V shall be addressed to such leader.</p> <p>4- The parties to the J/V nominate Mr..... as a representative of the leader and he is authorized to sign on behalf of the J/V all documents and contracts related to tender no. (/), and to represent the J/V before all competent courts and non official bodies in all contractual, administrative , financial and legal issues related to tender No. (/) and the contract pertaining thereto.</p> <p>5- The parties to the J/V have no right to terminate this agreement or substitute the leader’s representative until the works awarded to them by the contract to this tender are completed and shall remain responsible before the employer until the works are finally taken over as per the conditions of taking over specified in the Tender / Contract documents .</p> <p>6- This agreement is written in both Languages Arabic and English should any difficulty of interpretation arise the Arabic text shall be considered the authentic.</p>	<p>المحاكم المختصة والدوائر الرسمية وغير الرسمية في كافة الأمور العقدية والإدارية والمالية والقضائية المتعلقة بالعتاء رقم (/) والعقد الخاص به .</p> <p>5- لا يحق لأطراف الائتلاف أو أي طرف فيه فسخ الائتلاف فيما بينهم أو تبديل ممثل رئيس الائتلاف إلا بعد إنتهاء الاعمال المحالة عليهم بموجب العقد الخاص بهذا العطاء وتكون مسؤولياتهم تجاه صاحب العمل قائمه إلى حين تسليم الأشغال استلاماً نهائياً حسب شروط الاستلام المحددة في وثائق العقد / العطاء .</p> <p>6- حررت هذه الاتفاقية باللغتين العربية والإنجليزية . في حالة نشوء أي اختلاف في تفسير أي من بنودها تعتبر لغة العقد المعتمدة هي اللغة العربية وملزمة للطرفين .</p>
<p>الطرف</p> <p>الطرف الثاني</p> <p>Third Party</p> <p>.....</p>	<p>الطرف الأول</p> <p>الثالث</p> <p>Second Party</p> <p>First Party</p> <p>توقيع الشخص المخول بالتوقيع قانونياً Signature of the Authorized Person</p> <p>.....</p>

Seal الخاتم الرسمي

.....

.....

.....

Notary Public Certification تصديق كاتب العدل