REQUEST FOR PROPOSAL (RFP)

RFP Subject: Advisory Services - Productization, Cloud Architecture and QA/DevOps
RFP#: PTC-037-2026

Issue Date: Monday 2nd of Nov,2026
Response Deadline: Monday 16th of Nov, 2026

Maximum Budget: EUR 26,622 (excluding VAT; third-party costs and hardware excluded)

Contact Information:
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1. Organization Background

The Palestine Trade Center (PalTrade), established in 1998, is a non-profit, membership-based organization mandated to lead the development and promotion of Palestinian trade as a driver of sustainable economic growth. PalTrade provides export development services, market intelligence, trade promotion, business linkages, and policy advocacy support to Palestinian businesses, with particular focus on small and medium-sized enterprises (SMEs) and export-ready companies.

2. Project Background

The project "EU4Trade: Unleashing Palestine Export Potential to the EU and International Markets", is funded by the European Union under its External Action programs.

The overall objective is to unlock the full potential of Palestinian exports, driving economic growth job creation, and the foundation for long-term economic sustainability for Palestine.

Specifically, EU4Trade aims to:

- Strengthen the capacity of Palestinian SMEs to access EU and international markets.
- Improve product quality, market readiness, export competitiveness, and business linkages.
- Strengthen PalTrade's strategic transformation through the establishment and operationalization of the Market Intelligence Hub (MIH).
- Promote Palestinian products internationally through participation in trade fairs, exhibitions, and targeted market-entry activities.

The project runs from 18 July 2024 to 18 July 2027 and is implemented by PalTrade with financial support from the European Union.

3. Scope of Work

PalTrade is seeking a qualified and specialized service provider/ consultant to deliver the productization and cloud architecture roadmap and the strengthening of QA, release, deployment and DevOps processes for the company's planned platform, in line with the two contracted advisory services

Current state:

Area	**Current State**
Platform	Open-source PBX (Issabel/Asterisk), on-premise, with custom dial-routing scripts
Architecture	Single-tenant — each client on a separate cloned VM (15-30 instances)
Infrastructure	Datacenter in Ramallah; ~50 peak concurrent calls
Agents	Hardware IP phones + softphones; no browser-based interface
Telephony	Mix of Palestinian and Israeli SIP trunks, configured per instance
Source Control / CI/CD / Testing / Monitoring / Staging	None
CRM / Ticketing / Omni-channel / AI	None
Security & Compliance	No formal policies or certifications

The service provider/ consultant has to:

- Assess the current platform and infrastructure, documenting all gaps, risks, and migration considerations.
- Design the cloud-native, multi-tenant contact center architecture and deliver a comprehensive architecture document.
- Define practical QA, release, deployment and DevOps procedures, with a pilot demonstration of the defined procedures; hosting, tooling and licences are funded by the company.
- Define the AI strategy, evaluate implementation options, and prioritize AI use cases, including speech-to-text transcription and sentiment analysis on call recordings.
- Transfer knowledge to the company's team through workshops, walkthroughs, and documentation.

4. Deliverables

4.1 Assessment & Architecture Design

#	Deliverable	Description
D1	Technical Assessment Report	Audit of current platform across all 15-30 client deployments: system versions, configurations, custom scripts, infrastructure, SIP trunk configurations, data flows, storage, and operational practices. Gap analysis and migration risk assessment for each deployment.
D2	Cloud Platform Architecture Document	Target multi-tenant architecture: component design, technology stack selection with justification, inter-service communication, database architecture with tenant isolation strategy, call processing and media architecture, SIP trunk management design, browser-based agent approach, high-availability design, and deployment topology. The productization roadmap and the cloud/infrastructure options assessment are delivered separately as D4 and D5.
D3	Multi-Tenant Design Specification	Tenant isolation model (data, configuration, telephony, users), tenant provisioning workflow, per-tenant customization approach (queues, IVR, business hours), and usage tracking approach.

4.2 Productization & Market Readiness

#	Deliverable	Description
D4	Productization Roadmap & MVP Backlog	Productization roadmap with technical requirements, phased development plan, MVP/pilot backlog and module prioritization.
D5	Cloud/Infrastructure Options Assessment	Comparison of public cloud, private cloud, hybrid and on-premise options for hosting the platform, with cost and regulatory analysis and a recommended option.

4.3 QA/DevOps & Delivery Process Strengthening

#	Deliverable	Description
D6	Source Control & CI/CD Pipeline (Procedures & Pilot Only)	Definition of practical QA, release, deployment and DevOps procedures, embedded with the company's team through a pilot demonstration. Consultancy time only; the consultant shall recommend and specify the required tooling and platforms; hosting, tooling and licences are procured and funded by the company based on the consultant's recommendations. Provide the QA/DevOps process note, testing workflow, release/deployment checklist, incident logging workflow, documentation standards and CI/CD requirements.

4.4 AI Strategy & Data Requirements

#	Deliverable	Description
D7	AI Strategy & Roadmap	Identification and prioritization of AI use cases for the platform (speech-to-text, sentiment analysis, call summarization, intelligent routing, agent analytics, workforce management predictions). Business impact and feasibility scoring. Build-vs-buy analysis: cloud APIs vs. open-source vs. custom development with cost, performance, and privacy comparison. Phased AI implementation roadmap.
D8	Data Requirements Specification	For each prioritized AI use case: required data inputs, formats, capture points in the platform, storage requirements, and preprocessing needs. Data architecture design for the AI pipeline.

4.5 Knowledge Transfer & Handover

#	Deliverable	Description
D9	Architecture & DevOps Workshop	Interactive session with the company's technical team: architecture walkthrough covering design rationale, hands-on demonstration of the defined QA/DevOps procedures and D6 pilot, and multi-tenant provisioning design walkthrough. The team should understand the architecture and procedures at a level enabling independent future development.
D10	AI Strategy Briefing & Handover	Session covering AI use case priorities, build-vs-buy rationale and data requirements. Hand over the AI strategy document, build-vs-buy analysis report, data requirements specification, and integration guidance for the recommended speech-to-text and sentiment analysis options. Advisory outputs only.

The assignment will be considered successfully completed when:

- **D1-D8 (Documents):** Delivered in professional format. Architecture document contains sufficient detail for a development team to implement CX modules without requiring the original architect for routine design decisions. The company approves the roadmap and architecture, accepts the phased plan, confirms the MVP/pilot backlog and selects a preferred cloud option. All advisory documents are handed over.
- **D6 (QA/DevOps pilot):** A pilot demonstration of the defined QA, release, deployment and DevOps procedures is completed with the company's team.
- **D9-D10 (Workshops and handover):** Conducted with minimum 5 of the company's team members. Interactive with Q&A. Materials retained by the company. Both sessions cover their

specified topics; the AI strategy, analysis, requirements and integration guidance in D10 are handed over.

The following are explicitly outside the scope of this RFP: Platform development, deployed call processing, routing, agent interfaces, monitoring or AI services, and code handover are excluded. The D6 pilot demonstrates defined procedures only.

- **CX application modules**: CRM integration, ticketing/case management, full agent desktop, reporting dashboards, omni-channel communication, campaign management, visual IVR designer, quality management, workforce management UI, and billing/usage metering. Any such development is undertaken and funded by the company and is not covered by this assignment or the project.
- **Advanced AI services**: Call summarization, intelligent routing, agent performance analytics, real-time sentiment, and WFM prediction models. The AI strategy and roadmap (D7) define how these will be implemented; any production deployment is undertaken and funded by the company.
- **Production hardening**: Load testing at full capacity, security penetration testing, and performance optimization for production SLA targets.
- **Client migration:** Migrating existing 15-30 client deployments from current systems to the new platform.
- **Hardware procurement**: Server infrastructure for hosting the platform is procured and funded by the company and is not covered by the project.

5. Location of the Assignment

Ramallah , West Bank, Palestine

6. Assignment Duration

The assignment is expected to be implemented over approximately eight to sixteen (8-16) weeks, with the detailed workplan to be agreed with the company at the start of the assignment.

The service provider should propose a detailed advisory delivery schedule showing the sequencing and estimated Level of Effort for each activity and deliverable.

7. Technical proposal requirements:

- **RFP** Documents **signed and stamped.**

Companies/individuals should be able to provide company profile, a valid company registration certificate, VAT official invoices and a valid deduction at source certificate. Individuals' consultants are requested to include their full details, CVs, cover letter, a copy of their ID and deduction at source certification (if available).
Submit the technical approach and methodology for D1-D10, including knowledge transfer, and a timeline and workplan with sequencing, milestones and estimated level of effort.

- **Proposed Team Qualification:**
  At least one (1) team member's CV is required, demonstrating the following minimum qualifications:
    - University degree in a related field.
    - Minimum eight (8) years of relevant professional experience, with demonstrated multi-tenant VoIP or cloud project references.
    - Proven experience in cloud/SaaS productization and architecture advisory for contact center/telephony platforms.
    - Demonstrated experience advising on multi-tenant SaaS architecture, including tenant isolation for data, configurations, users, and telephony.
    - Strong knowledge of SIP, VoIP, SIP trunks, ACD, call recording, and call routing.
    - Experience assessing browser-based/WebRTC agent connectivity options and advising on requirements and architecture.
    - Proven experience designing QA, release and DevOps processes, including CI/CD requirements, monitoring and staging practices, and deployment readiness procedures.
    - Experience in AI and data strategy advisory, including build-vs-buy assessment of speech-to-text and sentiment analysis options, data requirements and integration guidance, preferably supporting both Arabic and English.
    - Experience assessing security, scalability and high-availability requirements and advising on cloud infrastructure options.
    - Strong capacity for technical documentation, workshops, knowledge transfer, and handover.
    - Demonstrated ability to work with existing systems and conduct technical assessments and migration planning.

- **Proof of Previous Relevant Experience:**
  Applicants must submit a list of similar experiences completed recently in the same field and be supported by at least three (3) references or three (3) certificates of accomplishment

8. Financial proposal requirements:

1. Price proposal filled, signed, and stamped in a separated sealed envelope. State the total consultancy fee and breakdown by deliverable or group, including workshops and handover.
2. Prices shall be in **EUROs excluding value added tax (VAT).**
3. The total consultancy fee shall not exceed the maximum budget of **EUR 26,622 excluding VAT for both services combined.**

Any third-party costs (cloud services, licences, APIs) must be identified separately in the price proposal and are not payable by PalTrade. These costs, including hardware, are outside the bid

price and not payable by the project; the company procures and funds them. Any separate estimates are for information only.

9. General Terms and Conditions

- The assignment is open to eligible firms and individual service providers with demonstrated experience in the required services.
- National service providers must submit their proposals in two separate sealed envelopes labeled **RFP-PTC-037-2026 Technical proposal / RFP-PTC-037-2026 Financial proposal** accompanied by a scanned, signed, and stamped copy on USB. By **Monday, 16th of Nov, 2026,** no *later than 12:00 PM Palestine time.* Submissions shall be delivered to PalTrade's offices at Al-Bireh City, Al-Balou Street, Mall of Palestine Building 2, 5th Floor.
- Late submissions will not be considered.
- All inquiries shall be addressed, in writing by e-mail to procurement@paltrade.org ; the deadline for receiving any inquiries about the scope and contents of this RFP is **Thurday, 12th of Nov, 2026.** No inquiries shall be received after this date, *No inquiries will be taken over the phone.*
- Submitted proposals shall remain valid for one hundred and twenty (120) days from the submission deadline.
- All offers shall be submitted in English.
- Prices shall be quoted in Euro (EUR) and exclusive of VAT.
- The proposer's acknowledgment that PalTrade will not be responsible for any costs incurred in preparing or submitting the proposal.
- PalTrade reserves the right, at its sole discretion and without incurring liability, to cancel, postpone, divide, or extend this RFP in whole or in part. Service providers shall not be entitled to compensation or price adjustments resulting from such actions.
- PalTrade will award the contract based on the best price-quality ratio (best value for money), in accordance with EU4Trade project requirements.
- PalTrade reserves the right to treat as confidential the identities of all participants and the contents of their proposals.
- PalTrade will enter into a service contract with the successful bidder.
- PalTrade shall pay the contracted service provider the approved contractual amount upon satisfactory completion and acceptance of the final deliverables, submission of any required completion documentation, and receipt of a valid tax invoice and proof of origin, where applicable.
- Participation in this tender is open on equal terms to all natural and legal persons effectively established in an EU Member State or in any other eligible country. Tenderers shall state their nationality in their tenders and provide acceptable proof thereof. Where supplies with a unit cost above EUR 5,000 are offered, tenderers shall also state the origin of such supplies and, if awarded the contract, present an official certificate of origin with the first invoice.

10. Evaluation Criteria

- Technical quality (70%): previous relevant experience (20%) methodology, timeline and workplan (30%); Team CVs (20%).
- Financial offer (30%): cost-effectiveness and value for money.

Upon the completion of the technical evaluation, only proposals who were not eliminated during the technical evaluation and have achieved the minimum passing scores of (55%) out of (70%) will be evaluated financially.
The winner of this RFP is the applicant who receives ***the highest cumulative overall score*** of both technical & financial evaluations.

PalTrade will retain all records related to this procurement and the resulting contract for at least five (5) years after final payment and shall make them available to the European Commission, the European Court of Auditors and any authorized auditor upon request

11. Conflict of Interest

Tenderers must declare that they are not in a situation of conflict of interest with the EU4Trade project, PalTrade, or the beneficiary company. Any actual, potential, or perceived conflict of interest that arises during the procurement process or contract implementation must be disclosed to PalTrade immediately. PalTrade reserves the right to request appropriate mitigation measures or to disqualify a tenderer where a conflict of interest cannot be adequately addressed.

12. Confidentiality

All information provided in this RFP and received through proposals will be treated as confidential and used solely for the purpose of evaluating submissions, selecting a service provider, and administering the resulting contract.

13. EU Funding Disclaimer

"This tender is published within the framework of the EU4Trade project, funded by the European Union. This document has been produced with the financial assistance of the European Union. The contents of this document are the sole responsibility of the Palestine Trade Center (PalTrade) and can under no circumstances be regarded as reflecting the position of the European Union."

14. Compliance with EU Standards and Ethical Requirements

The selected service provider must comply with all applicable **European Union rules and standards** related to externally funded actions. These include, but are not limited to, the following:

- **EU Anti-Fraud and Anti-Corruption Rules**: The service provider shall avoid any form of fraud, corruption, conflict of interest, or irregularity as defined under applicable EU regulations and shall fully cooperate with any audits or investigations requested by the contracting authority or the European Commission.

- **Data Protection Requirements**: Where personal data is handled, the service provider shall ensure compliance with applicable EU data protection standards, including lawful processing, confidentiality, and secure storage of personal and business-sensitive information.
- **Environmental and Social Safeguards**: The service provider shall integrate environmental sustainability, respect for human rights, and responsible business conduct in all services rendered, in line with relevant European Commission environmental and social guidelines.
- **Code of Conduct for EU-Funded External Actions**: The service provider shall uphold the principles of transparency, non-discrimination, accountability, and respect for diversity and inclusion, and shall adhere to the ethical standards outlined in the Code of Conduct for Contractors in EU external actions.

Failure to comply with any of the above may lead to immediate contract termination and disqualification from future opportunities under EU4Trade.

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