



Managed IT Services

Tender Specifications attached
to the Invitation to Tender

JTI/IT/2010/OP/01

For the five Joint Undertakings: ARTEMIS, CLEAN SKY,
ENIAC, FCH, IMI

TABLE OF CONTENTS

1.	SUMMARY	6
2.	INTRODUCTION TO THE JUS	7
3.	OVERVIEW OF THE TENDER	8
3.1.	Description of the contract	8
3.2.	Timetable	8
3.3.	Participation in the tender procedure	9
3.4.	Participation of consortia	9
3.5.	Subcontracting	10
3.6.	Financial guarantee	10
3.7.	Presentation of the tenders	11
3.8.	Period during which the tenders are binding	12
3.9.	Nature of contractual relationship resulting from the award of the contract	13
3.10.	Contacts between the JUs and the tenderers	13
3.11.	Tax exemption	13
3.12.	Division into lots	14
3.13.	LOT 1 - Managed Infrastructure Services	14
3.13.1.	Required services	14
3.13.2.	Tasks	14
3.14.	LOT 2 – Telecommunications services	14
3.14.1.	Required Services	14
3.15.	LOT 3 – Application development and maintenance	15
3.15.1.	Required services	15
3.15.2.	Existing Information Systems	15
3.15.3.	Tasks	15
3.15.4.	Profiles involved	15
3.16.	Variants	15
3.17.	Confidentiality & public access to documents	16
3.18.	Contract provisions	16
3.18.1.	Duration of the contract	16
3.18.2.	Volume of the contract	16
3.18.3.	Place of delivery	16
3.18.4.	Contract implementation	16
3.19.	Ordering process	17
3.20.	Extensions for Fixed Price projects	18
4.	DESCRIPTION OF THE CURRENT SITUATION	19
4.1.	Staff	19
4.2.	Building	19

4.3.	Cabling & Network	19
4.4.	Office Equipment.....	19
4.5.	Software	20
4.6.	Servers and Back Office	20
4.7.	Telephony	21
4.8.	Data Connections.....	21
4.9.	sTesta.....	21
5.	LOT 1 - CORE INFRASTRUCTURE - REQUIREMENTS.....	22
5.1.	Existing Infrastructure to be reused	22
5.2.	Core infrastructure supplies	23
5.3.	Building & Cabling.....	24
5.4.	Network	24
5.4.1.	Active and passive components	24
5.4.2.	Router/firewall	24
5.4.3.	sTesta connection.....	24
5.5.	Back Office.....	25
5.5.1.	File Storage.....	25
5.5.2.	E-mail server	25
5.5.3.	Remote E-mail Access.....	25
5.5.4.	DNS.....	26
5.5.5.	Printing Service	26
5.5.6.	Backups and Restore.....	26
5.6.	Staff Computers	27
5.6.1.	Hardware	27
5.6.2.	Software	27
5.7.	Security	28
5.8.	Photocopiers – Multi functional devices.....	29
5.9.	Move and data transfer	29
5.10.	Virtual Private Network	29
6.	LOT 1 - MANAGED SERVICES	30
6.1.	Infrastructure Operations and system management.....	30
6.2.	Service Desk	30
6.3.	On site Support	31
6.4.	Exit Management	31
7.	LOT 1- CORE INFRASTRUCTURE – JUS STAFF EVOLUTION.....	32
7.1.	Supplies, setups and installations.....	32
7.1.1.	Delivery services.....	32
7.1.2.	Guarantee and extended maintenance	32
7.1.3.	Estimated quantities.....	32

7.1.4.	Set ups and installations	33
8.	LOT 1 - DESCRIPTION OF FUTURE NEEDS – EXTENDED INFRASTRUCTURE PROJECTS.....	34
8.1.	Web and application hosting.....	34
8.2.	Wifi Access.....	35
8.3.	Web conferencing	35
9.	LOT 2 – TELECOMMUNICATION SERVICES – REQUIREMENTS	36
9.1.	Internet Connectivity	36
9.2.	Fixed Telephony.....	37
9.2.1.	Other supplies - Conference phone / sound station	38
10.	LOT 3 – APPLICATION DEVELOPMENT AND MAINTENANCE - REQUIREMENTS	39
10.1.	Software Engineers.....	39
10.2.	Project Managers	39
10.3.	Senior analyst/programmers	40
10.4.	Junior analyst/programmers	40
10.5.	Exit Management	41
11.	EXCLUSION AND SELECTION CRITERIA	42
11.1.	Exclusion criteria	42
11.2.	Selection criteria.....	43
11.2.1.	Economic & Financial capacity	43
11.2.2.	Technical and professional capacity.....	43
12.	AWARD CRITERIA.....	45
12.1.	LOT 1 - Technical evaluation criteria	45
12.2.	LOT 1 - Technical proposal.....	45
12.2.1.	Technical architecture.....	45
12.2.2.	Project Plan.....	46
12.2.3.	Security aspects of the proposed solution	46
12.2.4.	Service Desk.....	48
12.2.5.	Quality of SLA	48
12.3.	LOT 2 - Technical evaluation criteria	49
12.4.	LOT 2 – Technical proposal.....	49
12.4.1.	Technical solution	49
12.4.2.	Project plan	49
12.4.3.	Service Level Agreement.....	49
12.4.4.	Reporting and Invoicing	50
12.5.	LOT 3 - Technical evaluation criteria	50
12.6.	LOT 3 - Technical proposal.....	51
12.7.	Financial evaluation	51

12.8. Financial proposal	52
12.9. Choice of the selected tender	52
13. LIST OF ANNEXES	54

1. SUMMARY

Awarding authorities	The 5 Joint Undertakings: ARTEMIS, Clean Sky, ENIAC, FCH and IMI
Purpose	The purpose of this call for tenders is to establish Framework Contracts for building an IT environment including telecommunications, hardware and software, and managed infrastructure services and application development and maintenance.
Lots	This call for tender is divided into 3 lots. Tenderers can apply to one or more lots.
Indicative volume	Lot 1: 1.500.000 € Lot 2: 300.000 € Lot 3 : 1.000.000 € <i>Please note that the volume indicated are <u>estimation</u> only.</i>
Contracts	The awarding authorities will sign a framework contract per LOT with the successful tenderer(s).
Submission of offers	Tenderers can apply to more than one lot but must submit one offer per LOT .
Duration of Framework Contract	4 years from the date of signature of the contract.
Main places of delivery	The premises of the five Joint Undertakings (Brussels).
Particulars of delivery	Delivery must be in conformity with the placed orders.
Variants	Not permitted.
Joint offers	Permitted.
Subcontracting	Permitted. However, any intention to subcontract must be clearly announced in the offer.

2. INTRODUCTION TO THE JUS

The contracting authority is made of five Joint Undertakings whose main and common function is to award grants to research and demonstration projects. The five Joint Undertakings are:

- The **ENIAC** Joint Undertaking was created in February 2008 in order to implement a Joint Technology Initiative (JTI) on Nanoelectronics - a research programme aimed at enhancing the further integration and miniaturisation of devices and increasing their functionalities. <http://www.eniac.eu>
- The **IMI** (Innovative Medicines Initiative) Joint Undertaking is a unique partnership between the European Community and the European Federation of Pharmaceutical Industries and Associations (EFPIA). The aim of IMI is to support the faster discovery and development of better medicines for patients and to enhance Europe's competitiveness by ensuring that its biopharmaceutical sector remains a dynamic high-technology sector. <http://www.imi.europa.eu>
- **ARTEMIS'** mission is to define and implement the Research Agenda for the development of key technologies in the field of Embedded Computing Systems, by creating a sustainable public-private partnership and leveraging and increasing private and public investment in the sector of embedded systems in Europe. <https://www.artemis-ju.eu>
- The **Clean Sky** JTI will be one of the largest European research projects ever, with a budget estimated at €1.6 billion, equally shared between the European Commission and industry, over the period 2008 - 2013. This public-private partnership will speed up technological breakthrough developments and shorten the time to market for new solutions tested on Full Scale Demonstrators. Clean Sky will encourage the participation of SMEs to ensure their full involvement in the programme, therefore offering opportunities to the entire aeronautic supply chain from all EU Member States and Associated countries. <http://www.cleansky.eu>
- The **Fuel Cells and Hydrogen** JTI (FCH) represents a new way of realising public-private research partnerships at European level. It will bring public and private interests together in a new, industry-led implementation structure, ensuring that the jointly defined research programme will better match industry's needs and expectations, and accelerate hydrogen and fuel cell technology acquisition and deployment processes.

http://ec.europa.eu/research/transport/info/hydrogen_and_fuels_jti_en.html

They are referred to for the purpose of this call for tender as "**the Joint Undertakings**" (also referred to as "**the JUs**").

3. OVERVIEW OF THE TENDER

3.1. Description of the contract

The JUs search for strategic partners to build the future IT environment. Three main areas are concerned each one corresponding to a particular Lot:

- Managed Infrastructure services: Supply of all required hardware, software and network components. Continuous management and monitoring of the supplied Infrastructure with the associated support services.
- Provision of Internet access services and fixed voice telephony.
- Application development and maintenance.

The JUs will become the owners of the required hardware and software components. Rental or leasing of equipment is excluded unless otherwise stated in the specifications.

The back-office infrastructure will be hosted in the future JU premises. The JUs have taken measures to accommodate a server room in their future premises.

3.2. Timetable

Summary timetable	Date	Comments
Launch Date	10 May 2010	
Deadline for request for clarifications from the JUs	25 June 2010	
Last date on which the JU issue clarifications	28 June 2010	
Deadline for submission of tenders	02 July 2010	Tenders delivered by hand shall be submitted not later than 17:00h Local Time
Public Opening of tenders received	9 July 2010	10.00 Covent Garden Building, 16 Place Rogier, 1210 Brussels
Completion date for evaluation of tenders	End July 2010	Estimate
Signature of contracts	End July/Beginning August 2010	Estimate

3.3. Participation in the tender procedure

Companies can apply individually or can consider two ways of collaborating in an offer: either as joint partners in the offer or through subcontracting. Both joint offers and subcontracting are allowed in response to this call for tenders. Offers may even combine both approaches.

In any case, the offer must specify very clearly whether each company involved is acting as a partner in a joint offer or as a subcontractor (this also applies where the various companies involved belong to the same group, or even where one is the parent company of the others).

Further details about the implications of these two modes of collaboration are outlined below.

3.4. Participation of consortia

Partners in a joint offer assume joint and several liability towards the Joint Undertakings for the performance of the contract as a whole. Statements saying, for instance:

- that one of the partners of the joint offer will be responsible for part of the contract and another one for the rest , or
- that more than one contract should be signed if the joint offer is successful,

are thus incompatible with the principle of joint and several liability. The Joint Undertakings will disregard any such statement contained in a joint offer, and reserves the right to reject such offers without further evaluation on the grounds that they do not comply with the tendering specifications.

Joint offers will be assessed as follows:

- the exclusion criteria (see §11.1) and the selection criteria for economic and financial capacity (see §11.2.1) will be assessed in relation to each company individually;
- the selection criteria for technical and professional capacity (see §11.2.2) and the evaluation criteria (see §11.1 and 11.2) will be assessed in relation to the tendering group as a whole.

If you intend to tender with a partner and have already set up a consortium or similar entity to that end, you should mention this fact in your offer, together with any other relevant information in this connection.

If you intend to submit a joint offer, you should be aware that, if you are awarded the contract, the Joint Undertakings will require you to give a formal status to the proposed association before the contract is signed. This can take the form of:

- the signature by all the partners of a “power of attorney” based on the model laid down in Annex;
- an entity with legal personality recognised by a Member State; or
- an entity without legal personality but offering sufficient protection of the Joint Undertakings’ contractual rights.

3.5. Subcontracting

Certain tasks provided for in the contract may be entrusted to subcontractors, but the main contractor retains full liability towards the Joint Undertakings for performance of the contract as a whole. Accordingly:

- the Joint Undertakings will treat all contractual matters (e.g. payment) exclusively with the main contractor, whether or not the tasks are performed by a subcontractor;
- under no circumstances can the main contractor avoid liability towards the Joint Undertakings on the grounds that the subcontractor is at fault.

If your offer envisages subcontracting, your file must include:

- a document :
 - mentioning the reasons why you are envisaging subcontracting;
 - stating clearly the roles, activities and responsibilities of the subcontractor(s), and;
 - specifying the volume / proportion for each subcontractor.
- a letter of intent by each subcontractor stating its intention to collaborate with you if you win the contract.

Offers involving subcontracting will be assessed as follows:

- The exclusion criteria (see §11.1) will be assessed in relation to each proposed subcontractor.
- The selection criteria (see §11.2) will be assessed in relation to each proposed subcontractor as follows:
 - Where the expected value of the subcontracting is €60 000 or less, no proofs required by the selection criteria will be requested;
 - Where the expected value of the subcontracting is over €60 000, the selection criteria will apply.

During the execution of the contract, the contractor will need the Joint Undertakings' express authorisation to replace a subcontractor with another and/or to subcontract tasks for which subcontracting was not envisaged in the original offer.

3.6. Financial guarantee

The Joint Undertakings reserve the right to request an additional performance guarantee with respect to the Specific Contracts which proportionally represent a relevant value in relation to the Framework Contract. The financial guarantee shall amount from 5 to 10 % of the amount of the specific contract.

It shall be issued by a bank, an authorised financial institution or a third party in favour of the Joint Undertakings. It shall be released within 2 months after complete execution and payment of the balance of the last Order Form or Specific Contract. It shall cover the performance of the Contract in accordance with the terms set out in the Contract.

3.7. Presentation of the tenders

It is extremely important that tenders be presented in the correct format and include all documents necessary to enable the evaluation committee to assess them. Failure to respect these requirements will constitute a formal error and may result in the rejection of the tender.

a) Number of copies

Your offer must be submitted in 5 copies (one original and four copies). The original version must be clearly labelled "Original" and the other copies "Copy 1", etc.

Your submission must include an electronic copy of your offer. However, please note that where there is any doubt, the paper version of the offer will prevail over the electronic one.

b) Covering letter

Your offer must include a covering letter signed by the person(s) empowered to represent the tenderer and entitled to sign the contract if your offer is successful.

c) Elements to be separated from the rest of the offer

The following elements of your offer must be submitted in separate binders or folders, which must be clearly labelled:

- Any financial quotation and its supporting documents,
- the financial identification and legal entity forms

An electronic copy of these elements should be provided on separate hard supports, which must also be clearly labelled.

Please ensure that the information relating to these elements is given nowhere else in your offer.

d) Sealing your offer

Your offer must be submitted in one or more sealed envelopes, each enclosed inside a second sealed envelope.

The outer envelope must read exactly as follows:

The Joint Undertakings Call for Tenders - Reference: JTI/IT/2010/OP/01 Office COV2 14/102 B-1049 Brussels
--

The inner envelope must read exactly as follows:

OFFER Call for Tenders - Reference: JTI/IT/2010/OP/01 Lot (you are bidding for)
--

If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across the tape. You may use boxes instead of envelopes if the size or weight of your offer so requires.

e) Submitting your offer

The deadline for submitting offers is indicated in §3.2. You may submit your offer in any of the following two ways. You should be aware that each of these ways has different implications as regards the observance of deadlines.

Please also refer to the ***Invitation to Tender*** for requirements on the presentation of the offer.

➔ Delivery by post or by courier service

You may send your offer by mail through the post or by courier service. In this case, your offer must be posted no later than midnight on the final date for the submission of offers.

You are strongly advised to use registered mail or an equivalent service guaranteeing the traceability of your dispatch. Proof of compliance with the deadline will be constituted by the date of dispatch, the postmark or the date of the deposit slip. In case of doubt, a tenderer may be asked to provide proof of dispatch.

The address for delivery must be the following:

The Joint Undertakings
COV2 14/102
B – 1049 Brussels

➔ Delivery by hand

The tenderer in person or an agent may deliver the offer in person at the Joint Undertaking's premises. In both cases, the offer must be deposited at the European Commission's Central Mail Office no later than the final date for the submission of offers.

At the time of writing, the European Commission's Central Mail Office is located at the following address: av. du Bourget, 1 / Bourgetlaan 1, B-1140 Brussels (Phone: +32-(0)2-299.29.21), and open on normal working days: from Monday to Thursday from 07.30 to 17.00, on Friday from 07.30 to 16.00.

However, we cannot guarantee that the information given above will continue to be accurate in the future and cannot therefore be held liable in the event of any change. You are fully responsible for ensuring that your offer is deposited in time. A Commission official of the Central Mail Office taking delivery of the offer will issue a receipt stating date and time of the delivery. This receipt will serve as proof of compliance with the deadline.

For security reasons, delivery by hand on the premises of the Joint Undertakings other than Central Mail Office cannot be accepted as a valid deposit.

3.8. Period during which the tenders are binding

The period of validity of the tenders, during which the tenderers may not modify the terms of their tenders in any respect, is 120 days after the deadline for the submission of tenders. In exceptional cases, before the period of validity expires, the JUs may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the initial period of 120 days irrespective of the date of notification.

3.9. Nature of contractual relationship resulting from the award of the contract

The contractual relationship between the Joint Undertakings and the successful tenderer will be governed by a special type of contract known as a “**framework contract**”.

Framework contracts involve no direct commitment and, in particular, do not constitute orders per se. Instead, they lay down the legal, financial, technical and administrative provisions governing the relationship between the Joint Undertakings and the contractor during their period of validity.

Actual orders will be placed after the framework contract is signed and in force, through “order forms” or “specific contracts” concluded in performance of the framework contract.

One framework contract will be signed per lot.

The Framework contract includes:

- (1) Special Conditions : on completion of the tendering procedure, this draft will be modified as necessary in line with the successful offer (e.g. prices)
- (2) General Conditions
- (3) General Terms and Conditions for Information Technologies Contracts.

When preparing your offer, you should take full account of these and any other documents included in the tendering specifications, as they will define and govern the contractual relationship to be established between the Joint Undertakings and the successful tenderer.

3.10. Contacts between the JUs and the tenderers

From the date of publication in the Official Journal until the deadline for request for clarifications, the only contact point for tenderer is:

- E-Mail: ju-itprocurement@imi.europa.eu

Requests for clarification may concern questions, including requests for further information about specific issues arising from the tendering specifications.

Tenderers should be aware that answers to questions of general interest raised during the tendering period will be made available regularly on the following website:

http://imi.europa.eu/procurement_en.html

It is the tenderer's responsibility to visit regularly this page.

3.11. Tax exemption

The Joint Undertakings are exempt from all duties and taxes, in accordance with Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities

annexed to the Treaty establishing a single Council and a single Commission of the European Communities.¹

3.12. Division into lots

For the purpose of this tender the assignments are divided into the following lots:

- LOT 1 : Managed Infrastructure Services
- LOT 2 : Telecommunications services
- LOT 3 : Applications Development and maintenance

Applicants may apply to only one or more Lots. **In this latter case the offer should include a complete proposal for each Lot.** The JUs require that the future contractors selected under this call for tenders cooperate actively between them for the performance of their respective contract.

3.13. LOT 1 - Managed Infrastructure Services

3.13.1. Required services

- (1) Supply of hardware and software components for the future IT infrastructure and – Core Infrastructure project.
- (2) Design, installation, configuration and set up of the Core infrastructure, including the migration of existing equipment and data to the new JU premises.
- (3) Design, supply, installation and configuration of extensions to the core infrastructure
- (4) Continuous System management and operations for the initial core infrastructure and for the future infrastructure extensions.
- (5) Service Support / Service Desk

3.13.2. Tasks

- System design
- Supply of hardware and software components
- Installations
- Operations
- System management
- Network management
- Service Desk / Service Support

3.14. LOT 2 – Telecommunications services

3.14.1. Required Services

- (1) Internet connectivity
- (2) Fixed voice telephony

¹ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2004:310:0261:0266:en:PDF>

3.15. LOT 3 – Application development and maintenance

3.15.1. Required services

Services in this Lot will cover the following areas:

- (1) Development, maintenance and support of Information Systems preferably based on out of-the-shelf software covering areas such as Enterprise Content Management (ECM), Human Resources management, Business Intelligence/Reporting and more generally Information Systems covering administrative processes within the JUs.
- (2) Development, maintenance and support of tailored made Information Systems covering core business processes and specific needs of JUs that may arise in the future.

3.15.2. Existing Information Systems

For managing the submission and evaluation process of research projects four of the five JUs use the standard tools developed by the European Commission.

The IMI JU uses its own web application for the submission and evaluation of research proposals. The application runs on SQL Server, MOSS and .Net technologies.

3.15.3. Tasks

Typical tasks involved in the above areas are:

- Project management
- Feasibility studies and proof of concept
- Design of solutions for business process automation and design of technical architectures
- Integration of Information Systems with existing Information Systems and within the Infrastructure provided from LOT 1 activities
- Implementation, testing, customisation, installation, documentation and users training
- Maintenance and Support of developed Information systems

3.15.4. Profiles involved

These services will be carried out by:

- Software Engineers
- Project Managers
- Senior analyst/programmers
- Junior analyst/programmers

3.16. Variants

In the absence of any such indication in the terms of reference your tender should not deviate from the services requested.

3.17. Confidentiality & public access to documents

In the general implementation of its activities and for the processing of tendering procedures in particular, the JUs observe the following rules:

- Directive 95/46/EC of the European Parliament and of the Council of 24 October 1995 and Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data, and;
- Council Regulation (EC) No 1049/2001 of 30 May 2001 regarding public access to European Parliament, Council and Commission documents.

3.18. Contract provisions

In drawing up your tender, you should bear in mind the provisions of the draft contract (see **ANNEX 3** to the present tender specifications). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

3.18.1. Duration of the contract

Four years.

3.18.2. Volume of the contract

The volume is estimated for the contract's maximum duration (4 years)

- LOT 1 : 1.500.000 €
- LOT 2 : 300.000 €
- LOT 3 : 1.000.000 €

The JUs may exercise the option to increase the estimated market amount at a later stage via a negotiated procedure with the successful tenderer(s) in accordance with Art.126(1)(f) of the Implementing Rules of the EU Financial Regulation.

3.18.3. Place of delivery

The requested services will be delivered at the current and future JUs premises in Brussels, Belgium. The future location is currently unknown.

3.18.4. Contract implementation

For each lot, the JUs will sign a Framework Contract with the successful tenderer. The Framework Contracts do not constitute orders.

The execution of the Framework Contracts will be performed through Specific Contracts/order forms.

LOT 1

Immediately after the signature of the Framework Contract a Specific Contract will be concluded with the successful tenderer for the implementation of the

"Core Infrastructure" project. The "Core Infrastructure" project requirements are described in § 5. LOT 1 - Core Infrastructure.

Subsequent specific contracts/order forms will be signed for the execution of Lot 1.

LOT 2

Immediately after the signature of the Framework Contract a Specific Contract will be concluded with the successful tenderer for the provision of the Internet connectivity and fixed telephony.

LOT 3

Specific Contracts will be concluded after the signature of the Framework Contract as the need arises.

3.19. Ordering process

Except for on site support services described in section 6.3, it is expected that Services for all Lots will be provided on the basis of Fixed Price Specific Contracts or Orders.

The following conditions relating to fixed price contracts/orders apply:

- The Contractor must present proposals meeting the requirements as specified in Request Forms and associated annexes (specifications, work packages, deliverables, deadlines etc.).
- The Contractor's offer must include a **project plan**. The project plan has to indicate the proposed activities, the team structure, profiles, roles, responsibilities and workload (man-days) of the project team. The financial offer must be based on the estimation of the total effort and on the associated infrastructure components costs (hardware and software).
- The Contractor shall provide all necessary infrastructures on his premises for the successful execution of the work. In other words, it is expected that Fixed Price Contracts / Orders are executed outside the JUs premises.
- The deliverables must be on time, and conform to the specifications as described in the Specific Contract / Order.
- The invoicing is based on the acceptance of the deliverables by the JU(s), independently of the real workload spent.
- Meetings with the contractor's team at the JU premises in Brussels can be required without any additional cost by the JU. Typically the number of meetings will be agreed before the conclusion of the Specific Contract / Order.
- A warranty applies to the deliverables accepted by the JUs.

The process for Fixed Price contracts/orders goes through the following steps:

Step 1: The need arises

The JU prepares the requirements/specifications and sends them to the Contractor.

Step 2: Request Form receipt confirmation

The Contractor receiving the Request acknowledges reception within **2 working days** from the day the Request was sent, by sending a fax or an e-mail to the contact person in the JU.

Step 3: Offer preparation

If necessary, the Contractor and the JU work on clarifications for the requirements. Clarification meetings may be held in order to establish a time frame within which the offer will be prepared and sent to the JU.

The Contractor delivers an offer to the JU.

The requesting JU notifies the Contractor whether the offer is accepted or not.

Step 4: Establishment of the Specific Contract/Order

The Contractor sends a formal offer to the JU conforming to the requirements (including a project plan, and a cost breakdown).

The Specific Contract/Order is established based on this formal offer. The Specific Contract will include details of the work to be carried out, the start date, the duration and any other relevant information.

Step 5: Execution of the Specific Contract / Order

The Contractor executes the contract/order and provides the requested deliverables.

Step 6: Acceptance

The acceptance is based on the conformance of the deliverables with the specifications described in the Specific Contract/Order.

The JU pays the accepted deliverables after reception of Contractor's invoices.

3.20. Extensions for Fixed Price projects

An extension is a prolongation based on the initial request and the initial offer when all the requested tasks have not been achieved by the previous Specific Contract.

The initial request contains a list of tasks (modules, work packages) corresponding to deliverables. The contractor has given a proposal according to this request. The Specific Contract may have covered only a part of the project corresponding to some deliverables. In this case, the JUs can conclude one or more new Specific Contracts for the remaining work without having to send again a new request and follow the complete order cycle.

The new Specific Contracts have to cover tasks included in the initial request under the conditions of the original offer. The technical annex could be updated if necessary, but the global conditions (including defined deliverables and the price) cannot be modified.

The total price of the project may not exceed the price quotation given in the initial offer. If the total price specified in the initial offer is exceeded, it is not possible to request an extension and the normal ordering process applies.

4. DESCRIPTION OF THE CURRENT SITUATION

4.1. Staff

Currently there are about 80 staff working, all JUs included.

The estimated total amount of staff for all 5 JUs together **should reach up to 150 people when fully staffed.**

4.2. Building

JUs are currently installed on the 14th floor of the "Covent Garden" building. This should remain so until the last quarter 2010. After this date JUs should move to another location/building in Brussels.

The JUs currently use an infrastructure that was put in place by the European Commission – Directorate General for Research to cover the interim period during which they would select their new building and final infrastructure.

4.3. Cabling & Network

The current building has been equipped with 3 data plugs per working post and 3 power plugs per working post. Two technical rooms are placed on the floor, where all the data/phone cables arrive (LR rooms).

Active network devices are also installed in these rooms. Two Cisco Catalyst 4500 switches are installed but they do not belong to the JUs. Consequently, they will not be reused in the future solution.

A router/firewall Juniper SSG20 is installed and configured to route data traffic to/from Internet and sTesta. This item belongs to the JUs and must be reused in the future solution.

4.4. Office Equipment

4 JUs already have acquired their office computers and printers. The remaining one is currently using computers and printers owned by the Commission, and should replace them in a short term.

The current PCs are Dell computers described in the following table. **This configuration should be considered as the bare minimum in terms of performance.**

Local printers are Lexmark 360D, group printers are Lexmark T644. All printers are connected to the network.

Table 1. Hardware currently owned by the JUs

Hardware	Cleansky	IMI	FCH	ARTEMIS
PC Dell	15	20	22	5
Notebook HP 6530b	2		12	
Elite book hp 2530p				6
Fax Brother 2820	1	1	1	
Fax hp j4580				1
Printer Lexmark T644	1	2	2	
Printer Lexmark 360D	12	12	8	
Colour printer Xerox 8560	0	0	1	
Dell T110 server (ARTEMIS JU only)				1

4.5. Software

All PCs are installed with a reference configuration based on Windows XP professional and Microsoft Office 2003 with major European languages spellcheckers. The Internet browser is Internet Explorer, and the mail client is Outlook 2003.

Licences of this software are covered by the Commission Framework Contracts. The JUs do not own these licences.

The ARTEMIS JU owns a 15-user license for a document management system (TriDoc, from Trilobita Informatics - Hungary). This system is a self-contained package that runs on a DELL T110 server running Windows 2003 with client access through the standard Internet browser.

4.6. Servers and Back Office

A group of 7 servers has been installed and is maintained by the Commission during the interim period. It is composed of:

- 2 active directory servers,
- 2 Exchange 2003 servers,
- 1 (one) file server,
- 1 (one) dedicated backup server controlling a tape library.
- One dedicated Outlook Web Access server.

All these servers run under Windows Server 2003.

An additional 8th server is installed with a CentOS Linux distribution. It serves as DNS server, a proxy server and Mail Transfer Agent (MTA) server, frontend for Exchange servers. This machine and the Outlook Web Access server are located in the DMZ, while the others are connected to the LAN.

The servers are Dell 6600 and 2650 computers. They belong to the Commission, not to the JUs. They will not be reused in the future location.

The backup server and the tape library do not belong to the Jus either. They will not be reused in the future location.

4.7. Telephony

The JUs have acquired a telephonic central (PABX) Siemens HiPath 3800, 74 Euroset 5010 analogue telephones, and 12 Optipoint 500 digital telephones. The central is connected to a leased E1 telephone line, providing 30 communication channels. See Annex 1 for details.

4.8. Data Connections

Internet Access is provided through a contract with BT. The installed line is 34 Mbps. The contract also provides with an anti-spam filter for e-mail, which greatly ease the MTA management.

4.9. STesta

A sTesta connection to the EU institutions is also installed. This connection is actually served by 2x 2Mbps line. One line is acting as the passive backup of the other. This connection is used by all JUs to access EU IT Applications and web sites.

5. LOT 1 - CORE INFRASTRUCTURE - REQUIREMENTS

Immediately after the signature of the Framework Contract a Specific Contract will be concluded with the successful tenderer for the implementation of the "Core Infrastructure" project. The "Core Infrastructure" project requirements are described below.

Throughout this document the term "**core infrastructure**" shall mean all the hardware, software and network components that need to be installed, configured and managed in order to provide the basic IT services to the JU staff in their future premises.

The JUs have decided to share their IT infrastructure in order to make economies of scale. The proposed core infrastructure solution can therefore foresee the sharing of servers, network, technical rooms, IT support, among JUs. **However, staff from one JU should never be able to access data from another JU, unless stated otherwise.**

The core infrastructure solution will be implemented by means of:

- Supply of the required Hardware, Software and Network components;
- Design, Installation and configuration of the core infrastructure components. Installation and configuration will concern both the new components to be provided as well as the re-use of existing components already acquired by the JUs.
- Migration of existing data and infrastructure;
- On-site support (dedicated person to JU premises);
- Continuous management of the core infrastructure.

The proposed solution must take into account the hardware already owned by the JUs. Existing desktop and laptop computers, as well as printers and faxes must be supported and reused in the proposed solution.

The Contractor must invoice each JU individually on the basis of a repartition key, unless stated otherwise for specific services. The repartition key will be communicated by the JUs at the time of signature of the contract, and will be updated regularly.

5.1. Existing Infrastructure to be reused

The following table contains an inventory of the existing hardware infrastructure that the JUs own². These components MUST be re-used in the core infrastructure project.

Most of the following hardware is purchased with 4-year extended maintenance from the supplier.

The Contractor will provide the required maintenance extension for items which are not covered by the 4-year extended maintenance.

² From the date of publication of this Call and the date of signature of the contract, the JUs may purchase a few other hardware that should also be supported by the contractor.

Hardware	Cleansky	IMI	FCH	ARTEMIS	Extended maintenance
Workstation Dell Optiplex 740 DT	15	20	22		4-Years
Standard Laptop: Notebook HP 6530b	2		12		4-Years
Ultra light Laptop: Elite book HP 2530p		6		3	4-Years
Fax Brother 2820	1	1	1		4-Years
Fax hp j4580				1	
Printer Lexmark T644	1	2	2		4-Years
Printer Lexmark 360D	12	12	8		4-Years
Colour printer Xerox 8560	0	0	1		4-Years
Server DELL Power Edge T110				1	4-Years
Firewall/Router JUNIPER SSG20	1 (belongs jointly to all JUs)				1-year

5.2. Core infrastructure supplies

All hardware components must include an extended maintenance service after the standard guarantee. The standard guarantee plus the extended maintenance shall cover a total of 4 year period.

The following is a list of the supplies that the future Contractor must provide for the core infrastructure.

- All Back Office Servers (see 5.5)
- All Windows server licences (Windows 2003 or higher)
- The Back-up infrastructure with the respective Backup server licences
- Exchange Server 2003 (or higher) licences
- All network active and passive components with the associated software licences
- All Windows licences for the existing Workstations and Laptops (Windows XP or Windows 7)
- The MS-Office 2003 for the existing Workstations and the Laptops
- 2 Black & White Copiers / Multi functional devices
- 1 Colour Copier / Multi functional Device

5.3. Building & Cabling

The JUs are in the process of selecting a building for their new premises (they will share the premises). The cabling (data, telephone and electricity) will be installed by the owner of the building. In any case, the future building will be located in one of the 19 communes of Brussels.

Computer room: The building will provide space for a server room of minimum 30 m². The room will be equipped with air cooling and fire extinguishing system.

5.4. Network

The solution must foresee the design and the installation of a network sized to serve a minimum of 150 staff. All staff will be using a desktop computer, a printer (shared or not). Some will have laptop computers, and some devices will be shared among staff (photocopiers, scanners, printers).

Base services like DFS, DNS, Microsoft Active Directory and preferably DFS must be put in place.

The local network should not be slower than 100 Mbps at each plug and 1000 Mbps for servers.

5.4.1. Active and passive components

The solution must include all required active and passive components, namely, switches, patch cords, racks, servers ... There must be enough ports on the switches to serve at least 2.5 network plugs per staff.

The supplier will both setup the installation and manage all requested changes (i.e. re-patching after printer or PC move).

5.4.2. Router/firewall

The LAN must be protected from external connections by a firewall. Only required ports will be opened. A router must also be installed and configured to route traffic to/from both Internet and the sTesta network. Both router and firewall must be chosen with regards to the amount of potential networked devices, to assure good performance.

5.4.3. sTesta connection

The sTesta network is a secure, encrypted network linking EU institutions and EU member states.

For their daily business, the JU need to access this network. They access several European Commission IT applications through this network. The JUs will provide the sTesta connectivity. Nevertheless, the proposed solution must foresee the interconnection of the sTesta network to the LAN, and configure the router appropriately so that traffic to/from sTesta is correctly and securely sent and received.

The sTesta connectivity is provided through 2 Ethernet connections: One being the production connection and the other being a passive backup connection.

The JUs will provide the Technical data required to configure routing at a later stage.

5.5. Back Office

We group under the term back office, all office servers and services (File, Print, Mail, Scanning ...)

All these services must be provided with reasonable level of redundancy. The goal being that in any major service disruption, the service can be restored within 4 working hours.

All five JUs can share the infrastructure put in place, but each one must be segregated from the others so that they cannot access each others' data; i.e. each JU must have its private file storage, quota, and not being able to print on other's printers, etc.

5.5.1. File Storage

The solution must foresee a minimum storage space of 100GB per staff. This storage will be used depending on needs and spread between services like file storage, e-mail, ...

In any case the storage must be easily expandable in case JUs should need more space for their business.

RAID5 storage should be used for all data storage as a minimum redundancy measure. Usage of technologies like snapshots and volume mirroring will be appreciated.

All data from one JU must be segregated from the other JU using file/directories access rights. However a common file exchange space between JU must also be foreseen.

5.5.2. E-mail server

The JUs currently use a Microsoft Exchange/Outlook solution for e-mail. This email system is mandatory in the solution.

The mail servers must be closely monitored and equipped with appropriate anti-spam/anti-virus tools to guarantee that staff will not suffer from these problems.

In case of false positive spam/virus e-mail, a solution must exist to recover e-mails during a period of 2 weeks at the minimum.

Mailboxes must have a minimum capacity of 200 MB. One mailbox must be defined for each staff with a layout such as:

first-name.last-name@JU-domainname.

It is mandatory that the existing mailboxes and domain names are maintained.

JUs should be able to request the availability of functional mailboxes (non nominative mailboxes such as contact@JU-domainname).

Mailbox storage extension must be possible on request or for specific mailboxes.

The maximum size of e-mail messages (with or without attachments) must not be lower than 10 MB.

5.5.3. Remote E-mail Access

As the combination of Exchange and Outlook is imposed, a remote access to e-mail is also required. The solution should then obviously be based on Outlook Web Access.

Access to this service must be appropriately secured using both passwords and encryption.

5.5.4. DNS

Each JU currently owns a domain name that is used for their e-mail addresses and for their website:

Domain name	Managed by
Cleansky.eu	Hosted and managed by a private hosting company
Imi.europa.eu	Hosted and managed by the Commission
Fch.europa.eu	Hosted by the Commission; delegated to the JUs
Artemis-ju.europa.eu	Hosted by the Commission; delegated to the JUs
Eniac.europa.eu	Hosted by the Commission; delegated to the JUs

The proposed solution must include both an Internet DNS service able to service the delegated zones, and an internal (LAN) DNS service to serve LAN requests.

5.5.5. Printing Service

A printing service must be put in place and allow staff to print on any group printer of its own JU. This service must take into account the existing printers.

Printing to photocopiers (especially for large print jobs) must be foreseen too.

As printing is a basic need for business, this service must also be redundant (using multiple servers, clusters or any appropriate means).

5.5.6. Backups and Restore

At least a daily backup of all modified data must be performed and kept for potential restore request for a minimum of 6 months. Mechanism like incremental, differential and full backups can be used.

Backup tapes or disks must be stored in a safe place, protected from both theft and incidents (fire, water leaks ...), and in any case in a different location than the servers containing the data being taken in backup.

The restore service must be able to restore files, mails or any other data with a time frame of 4 office hours.

The restore of single files or mailboxes must be possible on user's request.

5.6. Staff Computers

Lot 1 includes the configuration, maintenance and helpdesk of all staff computers, including current ones and new ones to be acquired by the JU, as well as the provision of new computers upon request.

The tenderer should ensure the installation/configuration of any hardware.

Computer setup (reference configuration) should prevent staff from installing software on their computers on their own. They must request IT support to perform requested installations.

All data should be kept on network drives or servers to guarantee that any data is taken in backup. The solution does not have to take care of backups for desktop computers as staff should be trained not to store any valuable data on their computers, but use network drives instead.

5.6.1. Hardware

See 5&1 for a detailed description of existing PC hardware. All existing computers must be reused and supported for all services in the proposed solution.

JUs will also request additional PC to be installed during the course of the contract. In this case, the delivered PC must at least meet the hardware/performance of the machine described in 5.1, and always be comparable to the market offer both in terms of performance and price at the moment of the acquisition.

5.6.2. Software

The Contractor will supply all the Operating System (Windows XP Pro or Windows 7) and Office 2003 licences to cover the existing PCs and laptops, since these licences do not belong to the JUs.

As regards the Operating System the choice is open. The tenderers may either start with Windows XP Pro in the future location after the migration and move of the existing infrastructure or migrate directly to Windows 7 before or during the move to the new location. **Tenderers must clearly state their preferred option.**

The MS Office 2003 shall be the standard Office version to start. Migration to MS Office 2010 will take place in a later stage to be decided by the JUs.

In addition, JUs might request additional software.

Mandatory Software to be included in the reference configuration for staff computers:

- Windows XP Pro or Windows 7
- MS Office 2003
- Anti-virus
- Compression tool (7-zip)
- Acrobat Reader
- Internet Explorer 8
- Java Runtime Environment (JRE) 6 Update 7 or above
- J2SE Runtime Environment 5.0 Update 16 or above
- Sun Java 2 Runtime Environment 1.4.2_18 or above
- Flash & Shockwave players

- Media codecs for RealPlayer 8
- Djvu browser plug-in
- Windows Media Player
- MS Office Visio and Project Viewer
- .NET Framework 1, 2 and 3
- Oracle Client 10G 10.2.0.3 32 bits

All published patches and updates must be applied to software in the reference configuration.

When applicable open source or free software should be used / proposed in agreement with the JUs IT representatives.

Access to any computer must be validated by a userid / password combination authenticating users. This mechanism must guarantee that only authorised staff of their respective JU can access a computer at any time.

5.7. Security

The JUs are constrained to apply the security measures described:

- In Commission decision C(2006) 3602 and;
- Its Implementing Rules.

Both documents are found as annex in the present document.

The following measures are minimum requirements for the future infrastructure. The JUs expect the tenderers to add value to these measures and develop the security measures they intend to implement, in a technical document (See § 12.2.3)

- At all time, and in every service, security must remain a major concern.
- All accesses on all computers serving JUs must be secured by a login and password.
- Password must contain a minimum of 10 characters and not be valid more than 6 months.
- Appropriate measures must be taken to guarantee that data belonging to one JU cannot be accessed by anyone external to this JU without authorisation.
- Access logs must be enabled on all servers and for Internet connections. Log data must be kept for one year and made available to JU directors requesting it.
- Private data protection rules must be observed.
- Backups of all data modified must be performed daily. Mediums must be kept in separate and safe places.
- Anti-virus software must be configured so that it is guaranteed that they are updated daily with viruses' signatures.

5.8. Photocopiers – Multi functional devices

Currently, the JUs make use of the following RICOH Multifunctional devices (MFD) (including copying, printing, and scanning possibilities):

- Black & white Ricoh MP 5000
- Colour Ricoh MPC 2800

Tenderers shall consider providing 2 x Black & White Multifunctional devices and 1x Colour Multifunctional device since the existing ones do not belong to the JUs. The proposed devices shall bear standard two years guarantee and shall be covered by a maintenance contract.

The new models proposed must have equivalent capabilities with the existing models.

The photocopiers/MFD must be connected to the network and configured so that they allow users to use it as printers.

The photocopiers/MFD must be configured so that staff can use it as document scanners too. Scanned documents must be made available either by e-mail, or on a shared folder, or both.

Scanned documents by a JU should not be accessible by staff of another JU.

5.9. Move and data transfer

The proposed IT infrastructure must be installed and tested prior to the effective move of the JUs to their new building. Migration of all data from the old infrastructure to the new infrastructure must be taken in charge, in collaboration with the existing providers.

The migration of the live infrastructure must be foreseen during a week-end, at a date decided with each respective JU, in order to limit the down time to a strict minimum.

5.10. Virtual Private Network

The 5 JUs Executive Directors have commonly decided to adopt a VPN solution to allow tele-working and to secure Business Continuity to all critical functions within their organizations.

The proposed solution will have to allow secured access to office data, emulating the main office desktop (access to workstations, corporate network resources and applications - including applications accessed through sTESTA such as namely ABAC - e-mail, files, intranet...) and applications from outside the normal office environment.

The Contractor shall install a VPN solution based on the IPSec standard, with deployment of VPN clients to JU Laptops. The use of hardware tokens is to be considered with a view of fulfilling the following requirements:

- Increased security of VPN access through hardware-based two-factor authentication
- reduced risk of tampering with personal and corporate information
- Flexibility and portability of the authentication device suited for remote access from any location.

Tenderers shall consider a solution serving 35 users.

6. LOT 1 - MANAGED SERVICES

Throughout the contract's duration, the provider shall deliver infrastructure management services aiming at keeping the infrastructure functioning, maintaining the infrastructure and securing the infrastructure.

6.1. Infrastructure Operations and system management

- **Infrastructure operations:** Backing up data, restoring data and testing restoration, managing onsite and offsite storage of data, securely disposing of data and equipment.
- **Maintenance of the infrastructure:** Corrective and preventive maintenance of all hardware components involved in the installation in order to reduce the frequency and impact of failures or performance degradation, standard tuning, standard software update and maintenance (OS, security patches, new versions/releases, etc).
- **Infrastructure monitoring and availability:** maintain the performance of the infrastructure in optimised levels, providing sufficient system capacity and availability.
- **Security control:** manage user identities and accounts (creation, modification, deletion). Ensure that all users (internal, external, temporary) are uniquely identifiable, and their identities and access rights are kept and maintained in the central repository (Active Directory). Ensure up-to-date security patches and anti-virus checks are permanently in place and in general preventive, detective and corrective measures are in place protecting against malware and unauthorised access to the IT assets (especially data and information). Ensure that security techniques and procedures (e.g., firewalls, security appliances, and network segmentation and intrusion detection) are used to authorise access and control information flows from and to the JU network.
- **Statistics and reporting:** Keep the IT Managers of the JUs informed about the status of changes to the systems, processes and procedures. Compile reports on system performance and on forecasted system performance to determine if sufficient capacity exists.

6.2. Service Desk

- **Incident management:** incident logging, follow up and resolution
- **Problem management :** root cause analysis and resolution
- **Proximity services:** Installation of hardware & software, move of hardware items, Repair / replacement of defective hardware or software components
- **Documentation creation / update:** Update the associated system and user documentation and procedures accordingly.

- **Knowledge transfer to end users:** organisation and provision of training sessions to end-users.
- **Statistics and reporting:** on incident and problem types, response time, resolution time, etc.

6.3. On site Support

It is mandatory to have at least one IT support person on site during office hours, with an effort of 220 man-days per year. This will be the subject of a "Time and means" specific contract.

The IT support must provide the following services:

- Define, maintain and install the reference configuration on all PCs, keeping software up to date, applying published patches, etc...
- Install and move IT hardware and software on request.
- Repair or replace defective hardware or software within one business day.
- Provide hardware/software usage assistance for every hardware/software delivered or already existing in the JU to all JU users.
- Maintain all servers providing service to the JUs: keeping software up to date, performing backups and restore, applying patches...
- Maintain an incident management database allowing to provide statistics on incidents types, response time, etc ...
- Maintain a hardware inventory.
- Support must be available in English. Other languages, particularly French is an asset.

6.4. Exit Management

An exit mechanism is foreseen to ensure the handover of the managed infrastructure services at the end of the Framework Contract without impact on the services or service level degradation. The handover procedure shall be an integral part of the service provision. No additional cost for the JUs shall result from this handover procedure. The Contractor commits itself to handing over any relevant information to a potential future Contractor in order to ensure a smooth transition and business continuity

7. LOT 1- CORE INFRASTRUCTURE – JUS STAFF EVOLUTION

After the initial set up of the core infrastructure in the new JU premises, the successful tenderer shall provide the required evolutions to synchronise the core infrastructure capacity with the evolution of the JU staff. Throughout the contract duration, the contractor shall supply equipment to replace old or obsolete equipment.

The future contractor will provide that by means of:

- Standard supplies, setups and installations;
- Extended set ups and installations

7.1. Supplies, setups and installations

The contractor shall supply the necessary office equipment for the JU newcomers, with all the required associated software components.

7.1.1. Delivery services

The supplies will include delivery services into the proposed price.

The contractor shall deliver the equipment to the future JU premises. The delivery time shall not exceed four weeks after the contractor has received a signed specific contract / order form from the respective JU.

7.1.2. Guarantee and extended maintenance

The hardware supplied shall be covered by a standard 2-year guarantee. The standard guarantee shall be extended to cover a total of 4-years period (extended maintenance).

The **extended maintenance** will cover:

- Normal working hours: from 8:30 to 18:00
- Incident resolution: 8 working hours.

7.1.3. Estimated quantities

The following table contains a list of the estimated quantities that the JUs may require.

The equipment proposed by the tenderer shall be similar in price and at least similar in performance with the respective equipment already owned by the JUs.

Equipment	Estimated quantity
Workstations (PC)	70
Ultra light laptops	15
Standard laptops	15

Workgroup B&W printers	5
Workgroup Colour printers	5
Local printers	40

The back office (server) and telecommunication equipment shall be supplied on an ad-hoc basis, when deemed necessary and upon prior approval of the JUs. However, such equipment will be equivalent in performance and price with the models installed for the core infrastructure project.

7.1.4. Set ups and installations

The contractor will plan, prepare, test and install the Hardware, Software and telecommunications components for newcomers, ensuring integration into the overall infrastructure without impact in the overall performance of the global environment.

Reference configurations for user workstations must be defined, maintained and used.

8. LOT 1 - DESCRIPTION OF FUTURE NEEDS – EXTENDED INFRASTRUCTURE PROJECTS

On JU request, the contractor shall implement specific infrastructure projects that extend the core infrastructure and support the development or the evolution of Information Systems in the JUs.

These extensions may be requested by a particular JU, and be implemented for a part or all the participating JUs.

Such extensions will be implemented by means of:

- **Supplies:** On JU request, the provider shall supply hardware and software components that may be outside the standard reference configurations. The supplies of equipment and software will be governed by the same conditions described in 7.1.1 and 7.1.2.
- **Analysis and design:** The supplier shall conduct an analysis and a design for the requested extended infrastructure solution aiming at integrating to the existing technical environment. Cost estimation will also be provided.
- **Installation, configuration and testing**
- **Rollout in production**
- **Documentation and knowledge transfer**

The following list of projects is indicative and not exhaustive. It presents the projects that the JUs may request as extensions after the initial set up of the core infrastructure projects.

8.1. Web and application hosting

All JUs currently have a web site. Some of them might request web hosting or hosting of an application resulting from the activities of LOT 2.

Typical requirements of application / web site hosting comprise:

- Provision of a dedicated server, in rental mode, to host an application or a web site;
Typical characteristics;
 - OS: Windows 2003 or higher
 - 2 CPU
 - 4GB memory
 - 2x72 GB internal hard disks 10K rpm.
- Connexion bandwidth at least 10 MBit/s; Possibility to upgrade on request;
- Provision of all required software licences to run the server and the web site or the specific application, in rental mode;
- Server management: updates/patches to OS and the other installed software, server resources monitoring, backup and restore services including web site contents;

- Server availability must be at least 99,9% average per month or better;
- Server protection against intrusions, spam, virus, etc;
- Support service with resolution time being 4 working hours or better. Possibility for faster resolution time in case of urgency reported by a JU.
- Reporting of statistics, including server statistics and web site or application statistics.

This service must be proposed on request of a JU and invoiced separately to the JUs requesting this service.

8.2. Wifi Access

Wifi Access points will be foreseen in the building meeting rooms. At the minimum connexions for 802.11b and 802.11g must be implemented. The WiFi access must provide access to Internet to JUs guests and visitors. It must be isolated from the local network of the JUs. As for Internet connections of JU staff, all WiFi activity must be logged by a proxy and authentication must be performed prior to provide access to Internet.

Visitors will receive the required connection credentials at their arrival.

8.3. Web conferencing

The Contractor may be requested to select and support a subscription service for a web conferencing solution.

The web conferencing shall allow JU staff to organise on line meetings and presentations via the Internet. The solution must provide features like slide show presentations, whiteboard with annotation, screen sharing, etc.

The web conferencing solution must be sold as a service and hosted at the vendor's premises. It is preferable that the solution does not involve installation of software to the meeting attendees' workstations.

The service cost shall be charged as a monthly or annual flat fee.

The Contractor will manage any required subscription to the proposed service, and provide required hardware (webcams) and software to allow staff to make use of the service.

Tenderers will consider a solution allowing 5 JU staff to organise online meetings with 15-20 attendees each.

9. LOT 2 – TELECOMMUNICATION SERVICES – REQUIREMENTS

9.1. Internet Connectivity

- Physical 34MBit/s line; The contractor must provide the possibility to start logically at 10 MBit/s. the connectivity must be scalable to 34MB in steps of 2 MBit/s on demand at any given time
- All Internet connections must be done through a proxy server that will log all users' activity. These logs must be available on request of the JU directors for their respective JU
- A connectivity router including installation and configuration. The contractor must fully manage the router and the connectivity
- Anti virus and anti spam protection
- Service availability: The availability of the service must be greater than 99,9% within 12 months period to the access point. The service availability rate applies to the initial capacity of 10 MBit/s, as well to the future possible upgrades. The downtime provoked by interventions not requested by the JUs will be taken into account to calculate the availability rate; the downtime provoked by scheduled interventions requested by the JUs will be excluded
- Network management: The provider must proactively manage and monitor the Internet service and /or any related connectivity services and hardware (router) and this 24h/24, 7d/7;
- Incident Management: Guaranteed Resolution time must be maximum 8 hrs after the incident occurs; this includes a full 100% connectivity and its related services up and running again, as well a full hardware replacement, if needed. The last known up and running configuration must always be applied to any incident management resolution
- Hotline Service: The provider must offer a hotline with helpdesk for support reachable at office hours (8:00 – 18:00)
- Ticketing System: The provider must give an access to their ticketing system
- Reporting: The provider must provide reports about the utilization and the availability of the connectivity. Reports must be available in electronic forms ;
- Exit Management: An exit mechanism is foreseen to ensure the handover of the Internet connectivity services at the end of the Framework Contract without impact on the services or service level degradation. This handover procedure shall be an integral part of the service provision. No additional cost for the JUs shall result from this handover procedure. The Contractor commits itself to handing over any relevant information to a potential future Contractor in order to ensure a smooth transition and business continuity ;
- Consultancy services: The contractor may be called to provide consultancy in the areas covered in this Lot. The consultants will be assigned tasks such as design, implementation and administration of solutions.

9.2. Fixed Telephony

- Provide a telephony line with sufficient external lines / channels for 150 staff (Currently there are 30 channels for 80 staff). Possibility to extend the number of external lines if the JUs request so ;
- The solution shall cover at least the following services:
 - Filtering International or toll calls
 - Caller identification (using lcd screen on telephone set)
 - Call forwarding
 - Call cascade/grouping
 - Call pickup
 - Conference call (both with internal and external users)
 - Hands free telephone sets
- Take over and preserve the existing 100 numbers (02 221 81 xx) ;
- Provision of additional 50 (new) numbers ;
- Upgrade of the existing telephone central Siemens HiPath 3800. Currently the HiPath 3800 allows only 12 digital devices (phone sets) to be connected, the rest supporting only analogue handsets. The future contractor shall upgrade the existing platform to allow connectivity of up to 150 digital phone sets;
- Move, Installation and Configuration of HiPath 3800 in the future location of the JUs ;
- Maintenance of the HiPath 3800 ;
- Supply of new digital phone sets: initially the contractor will supply 80 phone sets for the existing staff. Additional supplies must be provided to accommodate the newcomers in the JUs ;
- Faxes: provide the required lines allowing the utilisation of the five existing analogue fax devices and preserve the existing fax numbers ;
- Virtual fax: A virtual fax solution allowing staff to send and receive faxes via their Outlook client is desirable. This service may be requested by a particular JU at a later stage ;
- Service availability: The availability of the service must be greater than 99,9% within 12 months period to the access point. The downtime provoked by interventions not requested by the JUs will be taken into account to calculate the availability rate; the downtime provoked by scheduled interventions requested by the JUs will be excluded ;
- Incident Management: Guaranteed Resolution time must be 8 working hrs or better;
- Hotline Service: The provider must offer a hotline with helpdesk for support reachable at office hours (8:00 – 18:00) ;
- Reporting: Detailed figures on minutes of outgoing calls by country/zone with unit price per call. Such reports shall be provided in electronic format and support the monthly invoices ;

- A billing solution must be included that allows to invoice each JU its respective phone communications.
- Private calls identification: Staff should be able to identify private phone calls that should be charged to them by the JU (i.e. by composing a code prior to dialling).
- Exit Management: An exit mechanism is foreseen to ensure the handover of the Telephony services at the end of the Framework Contract without impact on the services or service level degradation. This handover procedure shall be an integral part of the service provision. No additional cost for the JUs shall result from this handover procedure. The Contractor commits itself to handing over any relevant information to a potential future Contractor in order to ensure a smooth transition and business continuity ;
- Consultancy services: The contractor may be called to provide consultancy in the areas covered in this Lot. The consultants will be assigned tasks such as design, implementation and administration of solutions.

9.2.1. Other supplies - Conference phone / sound station

The Contractor may be requested to provide telephony equipment to cover ad-hoc needs.

As an example, a conference phone / sound station device allowing performing reliable audio conferences must be available on request in the meeting rooms. If a single device is not sufficient, additional devices or options (satellite microphones), might be requested later.

10. LOT 3 – APPLICATION DEVELOPMENT AND MAINTENANCE - REQUIREMENTS

10.1. Software Engineers

Nature of Tasks	▪ Provision of advice and assistance in any area associated with the procurement, provision, delivery, maintenance, deployment, hosting, effective use of information systems and their environments ▪ Design and Assessment of solutions; comparative studies and cost/benefit analysis ▪ Proof of concept ▪ Elaboration of vision documents, functional requirements and use case analysis ▪ Provision of technical studies, technical expertise, elaboration of Technical Architecture and Infrastructure, elaboration of Architectural Guidelines and recommendations ▪ Production of technical documentation ▪ Assistance with system configuration and deployment.
Required skills and experience	▪ Minimum of 5 years IT experience in the above tasks ▪ Knowledge of component based application and service oriented application development ▪ Good communication skills in English ▪ French is an asset

10.2. Project Managers

Nature of Tasks	▪ Project management including proposals for project strategies, planning, definition of tasks and deliverables, review of project deliverables, quality control, risk analysis and management, status reports, problem reporting follow up and project organisation. ▪ Requirements gathering and project scoping; ▪ Participate in functional and technical working groups and progress meetings; ▪ Estimate costs, timescales and resource requirements for the successful completion of each project to agreed terms of reference; ▪ Prepare and maintain project and quality plans and tracks activities against the plan, provide regular and accurate reports; ▪ Monitor costs, timescales and resources used, and take action where these deviate from agreed tolerances. Ensure that delivered systems are implemented within these criteria; ▪ Manage the change control procedure gaining agreement for revisions to the project from project sponsors; ▪ Provide effective leadership, manage and motivate the project team.
Required skills and experience	▪ Minimum 5 years experience in Project Management of software development ▪ Hands-on experience with the system development life-cycle ▪ Knowledge of structured project management methods & techniques (e.g. PMI /

	Prince2) ▪ Good knowledge of relational database systems ▪ Proven experience with quality procedures ▪ Experience in multi-cultural environments. ▪ Excellent English is mandatory ▪ Knowledge of French is an asset.
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10.3. Senior analyst/programmers

Nature of Tasks	▪ Analysis of user requirements. ▪ Prototyping ▪ Data modelling for relational data bases ▪ Write/maintain programs that reflect the specifications based on user requirements. ▪ Perform unit and integration tests. ▪ Produce the relevant technical documentation and documentation for the end users. ▪ Produce training and material for administrators and end user manuals ▪ Assist with training the users of the system ▪ Attend meetings with the users.
Required skills and experience	▪ More than 5 years hands-on experience in software development projects. ▪ More than 5 years of programming experience in programming languages and technologies. ▪ Good knowledge of modelling tools (e.g. UML) ▪ Knowledge of software development methodologies (e.g. RUP) ▪ Experience in multi-cultural environments. ▪ Good communication in English, ▪ French is an asset.

10.4. Junior analyst/programmers

Nature of Tasks	▪ User requirements gathering. ▪ Prototyping. ▪ Basic skills in data modelling for relational data bases ▪ Develop programs which reflect the specifications based on user requirements. ▪ Running program tests and supporting integration tests. ▪ Produce the relevant technical documentation and documentation for the support team. ▪ Produce training material and user manuals
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	▪ Organise and deliver users training ▪ Participation in meetings with the users
Required skills and experience	▪ 2 to 5 years experience in software development projects involving technologies and programming languages. ▪ Knowledge of modelling tools (e.g. UML) ▪ Experience with relational databases ▪ Experience in internet application development ▪ Experience in multi-cultural environments. ▪ Good communication in English ▪ Knowledge of French is an asset.

10.5. Exit Management

An exit mechanism is foreseen to ensure the handover of the provided services at the end of the Framework Contract without impact on the services or service level degradation. This handover procedure shall be an integral part of the service provision. No additional cost for the JUs shall result from this handover procedure. The Contractor commits itself to handing over any relevant information to a potential future Contractor in order to ensure a smooth transition and business continuity.

11. EXCLUSION AND SELECTION CRITERIA

11.1. Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) have been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Means of proof required

Tenderers shall provide a declaration on their honour (see model in annex), duly signed and dated, stating that they are not in one of the situations referred to above.

Nota bene:

The tenderer to whom the contract is to be awarded shall provide, within 15 days following notification of award and preceding the signature of the contract, the following documentary proofs to confirm the declaration referred to above:

- For points a), b) and e) a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- For point d) a recent certificate issued by the competent authority of the State concerned. Where the document or certificate referred to above is not issued in

the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

- In relation to items (c), (f), (g) and (h) above, an affidavit stating that:
 - you are not guilty of professional misconduct;
 - you have not been declared in serious breach of contract following a procurement procedure or grant award financed by the Community budget;
 - you are not subject to a conflict of interest;
 - you are supplying all the information required for the call for tenders in good faith and without misrepresentation.

This affidavit should be signed by the person(s) empowered to represent the tenderer and sign the contract if your offer is successful and dated less than four months before the final date for submission of offers

11.2. Selection criteria

The tenderer must submit evidence of their legal, economic, financial, technical and professional capacity to perform the contract.

11.2.1. Economic & Financial capacity

Requirement - In order to prove that you have sufficient economic and financial capacity to perform the contract, you will be asked to present some documentation.

Evidence required

- evidence of **professional risk indemnity insurance**;
- **balance sheets** or extracts from balance sheets for at least the last two financial years for which accounts have been closed, or equivalent documentation (e.g. where company law in the country in which you are established does not require you to publish your balance sheet);
- a statement of overall **turnover** and turnover concerning the goods and/or services to be covered by the contract during the last three financial years;
- if you rely on the capacities of other entities (e.g. your parent company), **a written undertaking** on the part of those entities confirming that they will place the resources necessary for performance of the contract at your disposal.

11.2.2. Technical and professional capacity

Requirement(s)

For each LOT, the tenderer's technical capacity will be evaluated on the basis of:

- (1) Suitability of the tenderer's organisational structure to supply the services covered by the Framework Contract;
- (2) References to similar contracts.

Evidence required

The following documents or information must be presented as evidence of compliance with the technical and professional criteria.

- (1) For ALL LOTS: Description of the measures employed to ensure the quality of services covered by the contract. This description should include:
 - Overview of the company's departments mentioning the currently allocated number of staff on all levels;
 - Description of the company's departments responsible for the provision of services requested in the particular LOT of the present call for tenders;
 - Any relevant information on the qualifications of the staff who will be responsible for the execution of the contract (e.g. aggregated figures on education, post graduate studies, certifications, etc);
 - If relevant, description of the relationship between the company and other companies of the same group;
 - Description of the relationship between the company and major hardware and software providers;
 - Quality assurance procedures, including —if applicable— details on ISO9000 / EN29000 certification.
 - Compliance with standards and methods in ICT (e.g. Governance, Infrastructure management, project management, maturity models)
- (2) For LOT 1 only: A description of the tenderers infrastructure (servers, Operating Systems, networks) including, if applicable, the description of the hosting facilities / data centres in place.
- (3) For LOT 3 only: A description of the company's competencies in following areas
 - Main Programming languages / environments supported
 - RDBMS
 - Modelling tools and methods
- (4) A description of 2 major contracts performed during the past three years similar to those described in the respective LOT in this

invitation to tender. Each reference must include the following information:

- Client name;
- Start date (mm/yy);
- Finish date (mm/yy) [Actual / planned];
- Contact person at client site (name + phone/e-mail);
- Volume in Euros or total effort in man-days, of the tenderer's share in the contract;
- Short description of services covered by this contract.

12. AWARD CRITERIA

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender offering the best-value-for-money (best quality-price ratio).

12.1. LOT 1 - Technical evaluation criteria

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid below.

No	CRITERIA	Weighting
1	Technical Architecture	10%
2	Project Plan	10%
3	Security aspects	30%
4	Service Desk	20%
5	SLA	30%
	TOTAL	100%

Note: The tenderer's score in each of the technical evaluation criteria must be higher than 50%, otherwise their offer will be disregarded.

12.2. LOT 1 - Technical proposal

The technical proposal shall consist of the following documents.

12.2.1. Technical architecture

The technical architecture document shall describe in details the proposed solution to meet the requirements expressed throughout the present tender specifications document.

- Overall infrastructure design and architecture
- Information security measures (for example firewall(s), intrusion detection/ prevention, DMZ zones, etc)
- Server architecture (matching and implementing the requested services)
- Storage servers/systems
- Backup and recovery system
- Data network (LAN and WAN)
- The software licences installed on the components.
- The choice of the installed Operating System on the users' workstations (and laptops): Windows 7 or Windows XP. It must be clearly stated whether the JUs will start with Windows 7 or Windows XP in the new location
- Choice for VPN solution.

12.2.2. Project Plan

The project plan will describe the work breakdown structure of the core infrastructure project for the initial set up, including a time line for the delivery of the project and the main deliverables.

The project plan must present the **migration** approach, the concrete steps for the relocation of the existing infrastructure and data from the current to the future building. A time line must be presented.

The way migration to Windows 7 will be organised with a concrete timing must be presented.

The project plan shall also specify any interruption of the service due to the migration, if applicable. The measures the company will take to minimise any interruption of the service must be presented as well.

12.2.3. Security aspects of the proposed solution

Tenderers shall develop the security aspects implemented into the proposed core infrastructure.

For doing so, tenderers will align with the "Implementing Rules for Commission Decision 3602 of 16.08.2006" (see § **Error! Reference source not found.** - Annex 10) and more particularly with the Annex 1 of the Implementing rules.

Tenderers are requested to focus and expose their technical and organisational measures to comply and implement the following sections of the Annex 1 of the Implementing Rules (IR).

Note: Throughout the Implementing rules document "Commission" should read "the JUs".

Content	IR section
Inventory of information systems assets	2.1.1
(all sub-sections from 4.2.1 to 4.2.4)	
Equipment security (all sub-sections from 4.2.1 to 4.2.4)	4.2

Operational procedures and responsibilities (all sub-sections from 5.1.1 to 5.1.3)	5.1
Capacity Management	5.3.1
Controls against malicious code	5.4.1
Back up: Description of the procedure, how back ups are tested, restore process and time to restore.	5.5.1
Network Infrastructure controls	5.6.1
Security of network services	5.6.2
Management of removable media (with focus on backup tapes)	5.7.1
Disposal of media (with focus on backup tapes)	5.7.2
Security of system documentation	5.7.3
Audit logging	5.10.1
Monitoring system use	5.10.2
Protection of log information	5.10.3
Clock synchronisation	5.10.4
User registration	6.1.1
Privilege management	6.1.2
User access credentials management	6.1.3
Change of user access rights	6.1.4
External connections control	6.2.2
Segregation in networks	6.2.3
Remote connexions control	6.2.4
Operating system access control policy	6.3.1
Use of system utilities	6.3.2
Information access restriction	6.4.1
Reporting information systems security events	8.1.1
Reporting security weaknesses	8.1.2

Additionally, the tenderers shall present the **fail-over** capabilities and mechanisms of their proposed solution together with fail-over testing plan and schedule.

12.2.4. Service Desk

The contents of the documents are described hereafter. Tenderers shall consider the following points as the minimum content to provide. They can add elements that according to them may add value.

- Describe the role and the tasks of the requested IT support person who will be dedicated from the successful tenderer to the JU premises. He/She will act as single point of contact for the JU users on a daily basis.
- Articulate how from the single point of contact Incident management, problem management, capacity and availability planning will be implemented as managed services for the proposed infrastructure.
- Give examples of reports that can be delivered to the JU IT Managers on incident and problem types, response time, resolution time, etc
- Give examples of reports that can be provided on system performance, on forecasted system performance to determine if sufficient capacity exists.

12.2.5. Quality of SLA

A minimum service level is described in Annex 8.

The JUs require high levels of performance and reliability from the IT systems provided under LOT 1. Tenderers are required to provide in their offers details of:

- Key Performance Indicators (KPIs)
- Penalties offered in case of non-compliance with KPIs.

The KPIs and corresponding penalties offered by the tenderers will form an important competitive element in the selection of the winning tender. Tenderers must include with their offer a detailed draft SLA with KPIs.

Proposals for enhanced SLA options (with cost implications) may be provided which can be the subject of negotiations with the winning tenderer but a minimum level of service must be described and fully priced.

Tenderers must also describe how they will confirm compliance with the SLA through regular reports and meetings. They will also describe the process for reviewing or modifying the SLA / KPIs over the life of the contract.

Notwithstanding the quantitative elements of the SLA and KPIs, on a qualitative level the JUs are seeking a cooperative relationship with the future IT services provider based on mutual respect. The JUs are seeking a supplier who has a customer satisfaction focus which goes beyond a robotic compliance with KPIs and demonstrates a willingness to support the JUs' work in a pro-active way.

12.3. LOT 2 - Technical evaluation criteria

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid below.

No	CRITERIA	Weighting
1	Technical solution	10%
1	Project plan and Time for service delivery	20%
2	Service Level Agreement	60%
3	Reporting and invoicing	10%
	TOTAL	100%

Note: The tenderer's score in each of the technical evaluation criteria must be higher than 50%, otherwise their offer will be disregarded.

12.4. LOT 2 – Technical proposal

The technical proposal for Lot 2 shall consist of the following documents:

12.4.1. Technical solution

In this document, the tenderers will describe the characteristics of technical solution, for the Internet and the telephony services, and how their solution meets the JU requirements.

Additionally they shall propose three models of phone sets, together with their characteristics and their unit prices. The starting point shall be an entry level phone set with basic functionality (see description at §9.2). The other two models will have more advanced functionality. Only the basic functionalities will be taken into account for the evaluation.

12.4.2. Project plan

The project plan shall contain a work breakdown structure of the tasks and the actions required to set up the internet connectivity and the fixed telephony service.

The timeline for the installation and delivery of the internet and the telephony service is an important element in the project plan.

12.4.3. Service Level Agreement

The SLA document shall address the following issues. Tenderers may extend the contents of the SLA.

The proposed SLA shall concern both Internet and fixed telephony.

- **Service Availability:** Specify the service availability you can guarantee (please bear in mind the value must be 99,9% or better) Please explain

the measures you will undertake to guarantee the proposed Service Availability;

- **Service Level Metrics** : Please indicate the service level metrics you propose with their detailed definition and their target values that you guarantee. Explain how you measure the guaranteed Service Levels at the end of each year ;
- **Incident Management**: Guaranteed Resolution time must be maximum 8 hrs or better after the incident occurs; this includes a full 100% connectivity and its related services up and running again, as well if needed a full hardware replacement. The last known up and running configuration must always be applied to any incident management resolution ;
- **Proactive Network Management**: Please describe the technical measures you intend to undertake to proactively manage the Internet service ;
- **Ticketing system**: Please describe the way your ticketing system is organised and operated;
- **Hotline service**: Please describe the organisation and the functioning of the Hotline service for the JUs ;
- **Penalty scheme**: Please propose a penalty scheme in case of failure to provide the minimum service levels ;
- **SLA Management**: Please describe the organisational structure you intend to set up in order to manage the proposed SLA to the Joint Undertakings. Give a description of the roles and the tasks assigned to them. Describe escalation procedures for problem handling.

12.4.4. Reporting and Invoicing

- Specify the contents (traffic statistics, availability, performance, etc) of the reports you can provide for the Internet service. Include examples of such reports.
- Describe your solution for identifying private calls (for the telephony) and reporting these calls.
- Specify samples of monthly invoices (for the telephony service) you can provide with a short description on data fields included in the invoices.

12.5. LOT 3 - Technical evaluation criteria

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid below

No	CRITERIA	Weighting
1	Project Management methodology	30%
2	Software development methodology	40%
3	Lessons learnt	30%

	TOTAL	100 %
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Note: The tenderer's score in each of the technical evaluation criteria must be higher than 50%, otherwise their offer will be disregarded.

12.6. LOT 3 - Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the terms of reference. To this end, technical proposal shall contain the following information:

- (1) A document describing the project management methodology used in your company.
- (2) A document describing the software development methodology used in your company.
- (3) A document describing how experience (lessons learned) from completed and delivered projects is gathered, analysed, structured and reused in your company.

12.7. Financial evaluation

Only tenders scoring 50 points or more (of a maximum of 100) total points against the technical award criteria will have their financial proposal evaluated.

The financial offers will be first checked for any arithmetical errors in computation and summation. Errors will be corrected by the Evaluation Committee as follows: where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will be the price taken into account.

The financial evaluation will be made on the basis of the price offered.

LOT 1 - Evaluation formula

The final price will be calculated by adding:

- the set up cost of the core infrastructure project;
- the cost of the managed services : the annual costs reported in Annex 4 will be multiplied by four to calculate the total 4-year cost;
- the cost of future supplies;
- the costs of the infrastructure extension projects. Whenever annual costs are asked in Annex 4, these costs will be multiplied by four to calculate the total 4-year cost.

LOT 2 - Evaluation formula

The final price will be calculated on the basis of the total non-recurring costs, the recurring costs and the costs of an estimated calling scenario for the voice telephony.

Further details are given in Annex 4.

LOT 3 – Evaluation Formula

The basis for the financial evaluation will be the cost of a typical project of 300 man-days involving all profiles requested:

- 30 days of a Consultant,
- 30 days of a project manager,
- 120 days of a senior analyst / programmer and
- 120 days of a junior analyst/programmer.

12.8. Financial proposal

- The financial proposal should be presented in the format found in **Annex 4**.
- Prices must be quoted in **EURO** and include all expenses necessary to perform the contract.
- Prices shall be fixed and not subject to revision for the first year of performance of the Contract. From the beginning of the second year of performance of the Contract, prices may be subject to revision. The revision shall be done as stipulated in the framework contract.
- Prices must be quoted free of all duties, taxes and other charges (especially VAT) as the JUs are exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Communities.
- Costs incurred in preparing and submitting tenders are borne by the tenderer and shall not be reimbursed.

12.9. Choice of the selected tender

The most economically advantageous tender is established by weighing technical quality against price on 50 / 50 bases.

The final note to tenderers will be attributed according to the following formulae:

$$\frac{P_{best}}{P_{tender}} \times 50\% + \frac{Q_{tender}}{Q_{best}} \times 50\%$$

Where:

P_{best} = the cheapest Final Price of the received tenders

P_{tender} = the Final price for the tender in question

Q_{tender} = the best quality score obtained from the technical evaluation criteria

Q_{best} = the quality score for the tender in question

The contract will be awarded to the tender having received the highest score.

13. LIST OF ANNEXES

Annex 1	Telephony description
Annex 2	Existing Network Plan
Annex 3	Framework contract, specific contracts and order form
Annex 4	Model financial offer
Annex 5	Declaration on exclusion criteria
Annex 6	Legal entity form
Annex 7	Financial identification form
Annex 8	Service level agreement (Lot 1)
Annex 9	Commission Decision C(2006) 3602
Annex 10	Implementing rules for Commission Decision C(2006) 3602
Annex 11	Power of attorney