

Tender Specifications for a DIGITAL PRESERVATION SYSTEM OF THE HISTORICAL ARCHIVES of the EUROPEAN UNION

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2015

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Table of Contents

1	GENERAL CONDITIONS.....	4
1.1	PRESENTATION OF THE EUROPEAN UNIVERSITY INSTITUTE	4
1.2	PRESENTATION OF THE OF THE HISTORICAL ARCHIVES OF THE EUROPEAN UNION	4
1.3	DEFINITIONS.....	4
1.4	OBJECT OF THIS TENDER PROCEDURE	5
1.5	OBJECTIVES	5
1.6	INFORMATION ON THE CONTRACT	6
1.7	LEGAL OBLIGATIONS TO BE BORNE BY THE CONTRACTOR.....	6
2	TECHNICAL SPECIFICATIONS.....	8
2.1	CURRENT APPLICATION INFRASTRUCTURE	8
2.2	SOFTWARE COMPONENTS	10
2.3	PEOPLE AT THE HAEU	13
2.4	GENERAL REQUIREMENTS.....	14
2.5	APPLICATION ENVIRONMENT AND PLATFORM.....	16
2.6	REQUIRED APPLICATION FUNCTIONALITIES	16
2.7	DATA MODEL.....	20
2.8	PRESERVATION WORKFLOW	26
2.9	THE SUBMISSION PROCESS	27
2.10	THE ARCHIVING PROCESS	31
2.11	THE ACCESS PROCESS	33
2.12	THE EXPORT PROCESS.....	35
3	PROJECT GUIDELINES.....	36
3.2	ENVIRONMENT & DESIGN CONSTRAINTS.....	36
3.3	APPLICATION ADMINISTRATION	37
3.4	MAINTENANCE, SUPPORT.....	38
3.5	TRANSCRIPTS, REPORTING, STATISTICS.....	38
4	SUBMISSION AND EVALUATION OF OFFERS	39
4.1	PROCEDURES FOR SUBMITTING AN OFFER.....	39
4.2	ADDITIONAL INFORMATION CONCERNING THE SUBMISSION OF OFFERS.....	43
4.3	OPENING OF OFFERS	44
4.4	GROUND FOR EXCLUSION	44
4.5	DOCUMENTS PROVING ELIGIBILITY IN RELATION TO THE GROUNDS FOR EXCLUSION LISTED ABOVE:	45
4.6	SELECTION CRITERIA	45
4.7	AWARD CRITERIA	47
4.8	INDICATIVE TIMELINE OF THE TENDER PROCEDURE	50
4.9	OBLIGATIONS AFTER BEING AWARDED THE TENDER.....	50
5	FINAL PROVISIONS	51

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5.1	GENERAL INFORMATION	51
5.2	BREACHES, NON-COMPLIANCE AND PENALTIES.....	51
5.3	PERSON RESPONSIBLE FOR THE CONTRACT	52
5.4	REFERENCE PERSON FOR THE CONTRACT	52

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1 GENERAL CONDITIONS

1.1 Presentation of the European University Institute

The European University Institute (EUI) is a postgraduate and post-doctoral research institute in the field of social sciences, established by a Convention dated 19 April 1972, ratified by the Member States of the European Community, with the aim of providing advanced academic training for doctoral researchers and of promoting research at the highest levels. The Convention setting up the EUI includes the "Protocol on the Privileges and Immunities of the EUI".

The EUI Community numbers about 1,000 members. Researchers, academic and administrative staff are for the most part – though not exclusively – citizens of the Member States.

The EUI's headquarters are at the Badia Fiesolana, Via dei Roccettini 9, in San Domenico di Fiesole (near Florence, Italy).

For more information, please see the EUI's official website at www.eui.eu.

1.2 Presentation of the of the Historical Archives of the European Union

The EUI hosts the Historical Archives of the European Union institutions (HAEU), which is the official archives for the historical documents of the Institutions of the European Union and a research centre dedicated to the archival preservation and study of European integration history.

The HAEU is an integral part of the EUI and shares the same administrative, technical and logistic infrastructure. Also from the ICT perspective the level of integration is very high as they share the same technical infrastructure and a number of software application. There are, however, some application that are specific to each part.

The application area 1 (described below in 1.4.1.a) is implemented and administered by the EUI, while application areas 2 and 3 (described below in 1.4.1.b and 1.4.1.c) are implemented by HAEU.

The EUI and HAEU users have equal access to all the above applications in function of their roles.

1.3 Definitions

The "Contracting Authority", the "Institute" and the "Client" shall mean the European University Institute (EUI), which is awarding to the Company the contract for the supply of the services that are the object of these Special Tender Specifications (STS).

The "Contractor" shall mean the Company that is awarded the contract for the supply of the services that are the object of these Special Tender Specifications; "Competitor", "Candidate", "Tenderer" shall mean any company submitting a bid in the tender procedure.

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1.4 Object of this tender procedure

1.4.1 In relation to this tender procedure, there are three major application areas concerning the records and archives management at the HAEU:

- a. The area of the “day-to-day activity” where records are created, modified, interchanged between users and used to support the business process. Here we are at the beginning of the records lifecycle. This storage is for a short term period, that is the time necessary to support the business processes in question.
- b. When a record is no longer needed to support day-to-day business activities and no more changes are foreseen, the record needs to be archived. This stage concerns the area of “current archiving” where the record is processed according to the record management rules. The period of storage is limited and defined according to the policies of the Institute. This intermediate stage generally lasts several years. Then the records are either destroyed or archived indefinitely.

Areas a. and b., which can be summarised under “records management” occur at the EUI, for which the HAEU provides records and archives management services.

- c. When a document needs to be archived indefinitely this concerns the area of historical preservation. Relevant records are classified and evaluated by professional archivists and stored indefinitely according to the rules in place for long term digital preservation.

Area c. refers to HAEU services provided for the EUI and for EU Institutions, bodies and agencies on request.

1.4.2 This project concerns exclusively the area of long-term digital preservation (or historical digital archiving), that is the third area 1.4.1.c mentioned above. The project will not affect the other two areas, but they must be taken into consideration.

1.4.3 The focus on digital conservation of a variety of primary historical sources, either digitally-born or digitized paper materials, aims to provide academics and researchers with online access to a unique selection of official documents, handwritten texts, emails, photographs and audio and video tracks. These so-called “digital holdings” will be stored on an IT infrastructure physically located in the EUI premises and designed to preserve these sources indefinitely.

1.5 Objectives

1.5.1 The strategic objectives of this project to be met are:

- a. deploy the most suitable technology to store information and the methods to secure the long term availability of information; it must be noted that long term availability implies the capability to access the content without depending on specific software/hardware tools and in a cost-effective way;

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- b. interface (reuse) with the current software system and workflows as much as possible;
- c. assure the protection, the integrity and the completeness of the captured information, in a way also usable in content syndication and to manage secure property rights;
- d. (re)structure information to facilitate the generation of different output formats.

1.6 Information on the contract

1.6.1 Type of contract: The service contract that will be signed at the conclusion of this tender procedure shall be based on the Draft Contract in Annex H, together with these Special Tender Specifications and other annexes, the Invitation to Tender letter and the Offer submitted by the Contractor as its bid, including all attached documentation.

In accordance with Article 7 of the EUI President’s Decision N° 44/2014 of 5 December 2014, the present call for tender is to be considered “Mixed procurement”, inasmuch as its subject consists on the one hand of services and on the other of supplies.

Any comment and/or request for clarification relating to the meaning and/or interpretation of the Draft Contract shall be submitted, together with clearly formulated explanations and grounds for the query, before the final deadline given in Article 4.8. Should the Institute not receive any query or request for clarification within the deadline, the content of the Draft Contract shall be implicitly considered fully accepted.

1.6.2 Duration: One (1) year, renewable automatically up to 6 times, each time for a period of execution of tasks of 12 months, except for the terms outlined in the withdrawal clauses (see Article II.14 of the Draft Contract in Annex H).

1.6.3 Presumed amount: The total presumed amount of the tender is established at € 175,000.00 (one hundred seventy five thousand/00), to cover the maximum extent of contract duration, i.e. 7 years.

The presumed annual amount is € 25,000.00 (twenty five thousand/00) p.a., excluding VAT.

This estimate was based on a market survey on implementation and maintenance costs. However, given the innovative nature of the project, it was calculated using variables that cannot be accurately predicted.

The amount of the tender shall include all those services envisaged in the Tender Specifications, in the Offer submitted by the Company participating in the tender, in the event it contains further improvements, as well as any other direct or indirect cost that may be incurred in the satisfactory supply of the services to be provided.

1.7 Legal obligations to be borne by the Contractor

The Contractor shall comply with all obligations towards its employees, as envisaged in the legal requirements and provisions relating to labour laws, including measures pertaining to

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health and safety, as well as regulations on social security and accident prevention, fully accepting to bear the responsibilities related to such obligations.
Pursuant to a simple request by the Contracting Authority, the Contractor shall be ready at any moment to provide clear proof of having fully complied with all such obligations.

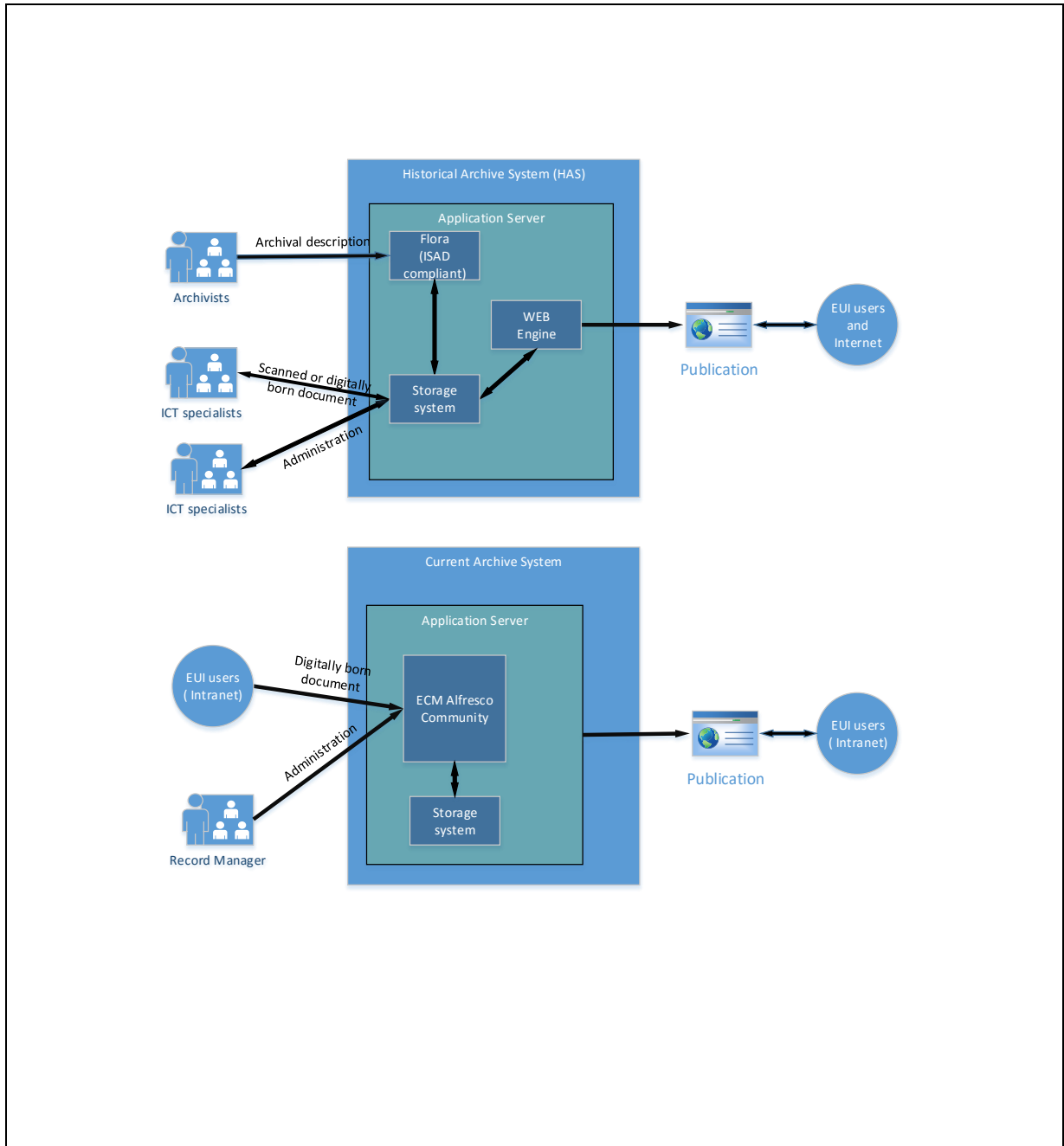
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2 TECHNICAL SPECIFICATIONS

2.1 Current application infrastructure

2.1.1 The following diagram shows the current conceptual view of archival systems operated by the HAEU.



AS-IS: General view of the current archival and record management systems

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The Historical Archive System (HAS) is the set of programs and workflows that compose the present core activities of the HAEU, which is the archival preservation of historical documents. All archival descriptions concerning any archival assets in any format (documents, microfilm, microfiche, photos, audio-visual items, in paper and digital) are entered via the interface offered by the Flora system and stored in a RDBMS operated by the ICT specialist of the HAEU. If the historical archival asset is of digital nature, either digitally born or digitized, it is entered in the system by the ICT specialist of the HAEU. This latter also deals with the scanning activity of existing (archived) non-digital assets.

- 2.1.2 The RDBMS database is hosted on the same server that hosts a WEB engine used for the publication of the archival description and of the archival digital assets.
- 2.1.3 The Current Archive System (CAS) is a set of programs and workflows that implement record management operations. The CAS has essentially practical, administrative (accounting) and legal purposes.
- 2.1.4 The existing system is built around the ECM Alfresco Community. The two systems are not interoperating.
- 2.1.5 The Website Archive System (WAS) is a set of programs and workflows that implement a web-preservation exercise for the EU Institutional websites. The system is administered by the HAEU personnel but operated and hosted by an external provider. The practical operation consists on performing regular crawls of a portion of the websites of the EU domain. The results are stored in the service provider's premises and published online via a dedicated web interface.
- 2.1.6 The box "storage hardware" in Figure 1 is a 36 Tb EMC Isilon X200 platform recently acquired to establish the initial long term storage core. The platform is scalable and its storage capacity is expected to increase to respond to the HAEU's storage needs.
- 2.1.7 HAS inventory structure:
 - 2.1.7.1 In full compliance with the ISAD (G) standard, the description of the archival organization is performed as follow:

- Fonds
 - Series
 - Files
 -
 - Sub-fonds
 - Series
 - Files
 -
- Series
 - Files

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2.1.7.2 According to ISAD(G) the six essential elements currently managed in the Archivist web application are:

- Reference code (label N. Dossier, unique serial identifier)
- Title (Title)
- Creator
- Date(s) (date estimated, and/or precise)
- Extent of the unit description (only for series)
- Level of description (embedded into inventory structure)

2.1.8 Conditions of access and use

The conditions have been defined according to ISAD (G) par. 3.4.1 «Governing Access».

2.2 Software components

2.2.1 HAEU specific software components

The following components are in scope for the current HAEU architecture

Software component	Description
Flora	Archive management solution http://www.ever-team.com/ It is based on Industry Standards J2EE, XML, JDBC, SOA, Unicode and LDAP directory connector. The tool is used as input -interface by the HAEU team.

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Software component	Description
WEB Engine	<p>Custom application that sends data to the RDBMS engine by consolidating and normalizing them according to internal rules. This module replaces the customization features of Flora as it is more efficient and easier to support.</p> <p>It is specifically designed to meet the compliance business practices and standards applicable to heritage and cultural archives: ISAD(G) and ISAAR (CPF). It includes functions that meet the control needs of the archives and rules related to archive categories enabling standardized inventories, distribution and exchanges in XML, publication on intranet and web sites (EAD and EAC).</p> <p>It is based on the Ruby language and the framework Ruby On Rails.</p>
MySQL RDBMS	The RDBMS in which the archival descriptions and the historical archival assets are stored
Scanning software	Adobe Acrobat X pro
Alfresco Community	Open source enterprise content management system for Microsoft Windows and Unix-like operating systems. The CAS implementation is hosted on a Windows server 2008 R2 standard (+ SP1) in a virtualized environment (Vmware)
Source file format	PDF, PDF+OCR, PDF A, MS-WORD, EXCEL, JPEG, TIFF, MP3, PAPER, MICROFILM, TAPE, ARC, WARC, most common video formats.

2.2.2 EUI IT infrastructure and standard

Server Operating Systems	Amount
Windows server 2008 R2 standard (+ SP1) in a virtualized environment (Vmware)	125
Linux red hat 5.x in a virtualized environment (Vmware) or Ubuntu Linux	75

Client Operating Systems	Amount
Windows 7 SP1	900

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Client Operating Systems	Amount

The EUI standard user platform consists of a single model of desktop PC with a unique standard configuration and a unique software model.

The unique software model is composed of one operating system, a number of general-purpose and administrative software applications (Standard Package), and several research software applications (Research Package).

More than 900 PCs are installed throughout the entire EUI campus while most critical functions are provided by servers organised in cluster for fault-tolerance.

All premises are linked by 1.000 Mbps (1 Gbps) LAN via fibre optic lines while telephones are based on VoIP infrastructure;

Various security technologies are implemented on a large scale, including pervasive anti-virus and spyware checking, automatic system updates (patches), encrypted communications, single sign-on infrastructure, continuous network access control, DMZ and firewall;

The unique software model is updated periodically by remote patch management.

In instances of corruption or malfunctioning of the standard packages, resulting from the installation of other software modules or hardware components, the ICT Service may be obliged to reinstall the standard and research package, cancelling the user's personalization features.

Standard package
Adobe Reader (including AIR) Adobe Flash Player FileZilla Internet Explorer Java Runtime Environment Adobe SVG Viewer TrueCrypt Microsoft Office: Excel PowerPoint Word Microsoft Office Proofing Tools: English German French Italian Spanish PDF Creator PuTTY

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Symantec Endpoint Protection
 NotePad++
 Windows Media Player
 SyncToy
 Image Resizer
 Adobe ShockWave Player

Research package
Atlas.TI Datastream Advance EndNote EViews Gauss Gauss Libraries: GhostScript GhostView MiKTeX MATLAB R 2009b MATLAB R 2011b MATLAB Toolboxes: OxMetrics R for Windows Scientific WorkPlace Stata/SE Stat/Transfer WinEdt

2.3 People at the HAEU

Role/Organization	Number of users
Archivist/HAEU	12
IT Specialist/HAEU	3
Administration/HAEU	7
Internal End-users/EUI faculty and administration	1100
Public (HAEU visitors)	Approx. 700/year

2.3.1 Archivist

Archivists are the information professionals who assess, collect, organize, preserve, maintain control over, and provide access to records and archives determined to have long-

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term value. The records maintained by the archivists can consist in any form of media (photographs, video or sound recordings, letters, documents, electronic records, etc.).

2.3.2 IT Specialist

The HAEU’s Information Technology (IT) specialists take care of the procurement, development and configuration of specialized software tools supporting the archivists activities. They also take care of bulk import/export of digital contents as well as their conversion to the currently used standards.

The HAEU’s IT specialists are not involved in the maintenance of the general IT Infrastructure (including servers maintenance) of the EUI, which is under the responsibility of the ICT Service.

2.3.3 Administration

Persons responsible for the performance or management of the HAEU’s administrative business operations

2.3.4 Internal End-users (EUI faculty and administration)

The HAEU shares infrastructure and administration with the EUI. Internal end-users are all people linked to the EUI by a collaboration contract. The internal end users are generally divided into two groups: the EUI administrators dealing with all administrative process, and the EUI faculty members dealing with academic/research activities. The EUI faculties are composed of professors and researchers.

The internal end user benefits of special access privileges to the contents of the HAEU archival holdings.

2.3.5 Public

Any user visiting the HAEU for consultation either physically or via the HAEU’s web pages

2.4 General Requirements

2.4.1 The project shall identify and implement the best strategy to accomplish the requirements listed in section 2.4 and below.

2.4.2 The architecture of the product proposed will be assessed from a cost and quality perspective. Quality will be assessed in terms of maintainability, reliability, redundancy and security.

2.4.3 The project shall support the approximate number of 20 archivist’s activities.

2.4.4 The project should allow the digital storing of a variety of primary historical sources.

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- 2.4.5 The thereby created “digital holdings” will be stored on an IT infrastructure physically located in the EUI premises and designed to preserve them indefinitely.
- 2.4.6 The project will allow deploying the most suitable technology to store information and the methods to secure the long-term availability of information.
- 2.4.7 The long-term availability implies the capability to access the content without depending on specific software tools in a cost-effective way.
- 2.4.8 The system will assure the protection, the integrity, and the completeness of the scanned document in a way that is also usable in content syndication and to manage secure property rights. It will exploit:
 - a. All the integrity features offered by the filesystem of the EMC Isilon X200 storage. In particular the use of hashing,
 - b. Use the object storage interface,
 - c. Use of digital certificates.
- 2.4.9 The system will structure information to allow the generation of different output formats.
- 2.4.10 The system will make available worldwide access to archival documents via a subscription process.
- 2.4.11 The project includes the procurement of a suitable hardware and software platform, if needed, to draw the digital holdings together in a fully searchable collection and create a range of corresponding open research resources.
- 2.4.12 The system will support aggregation and indexing: it combines documents from different applications and provides ways to organize the information;
- 2.4.13 The contents will be made available to the IT Specialist using an open standard ECM system;
- 2.4.14 The system will support long term preservation strategies: this involves the choice among the existing technologies to store information and the ways to secure the long term availability of information. While IT technologies are intrinsically limited in time, a long term strategy implies that the choice of the most suitable technologies, the definition of the procedure for the updates of technologies and the definition of the procedure to refresh and verify the data integrity, shall offer guarantees for undetermined preservation.
- 2.4.15 The IT hardware will be hosted in the EUI premise. For this purpose an IT technical room to host the new pieces of equipment has been built in a secured environment at the seat of the HAEU.
- 2.4.16 The project will allow the future interface with a twin backup storage available at the EUI secondary site and the implementation of a full real-time backup. The same data

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integrity requirements will apply plus the recurrent verification of the data consistency between the two sites.

2.4.17 Optionally the possibility to interface a third backup site using remote sites and cloud technologies could be explored.

2.5 Application environment and platform

2.5.1 The application and database servers shall run in a virtual server environment.

2.5.2 The Company will indicate what server operating systems the project supports. The Company will describe the server environment in all details necessary to run the application.

2.5.3 The company will take care of the configuration and integration of the required operating systems.

2.5.4 The proposed solution will indicate clearly the IT architecture map and the technical parameters like space, processor, memory resources, etc., required to support the project.

2.5.5 Back-up procedures: The Company shall describe a back-up and recovery solution.

2.5.6 Authentication and user access: Users of the main application and portal will use LDAP/ACTIVE DIRECTORY to authenticate. Access rights will be managed through the ECM, however it will be an advantage if the initial setup of the existing users is possible by script.

2.6 Required application functionalities

2.6.1 Conceptual diagram

The following diagram shows the envisaged scenario for the HAEU in order to support content management, publishing and digital preservation of historical documents.

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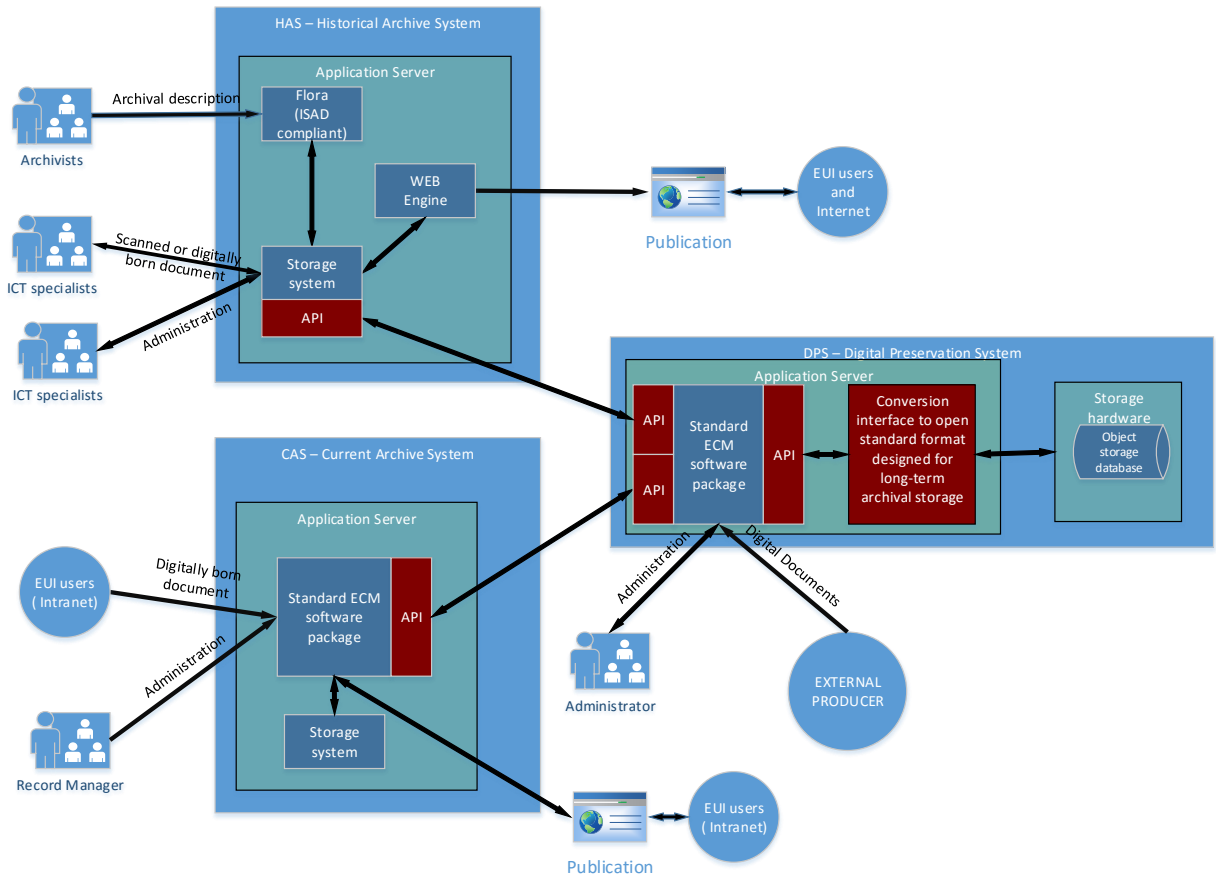


Figure 2-1 : High-level future application model

- 2.6.2 The project will deliver a storage infrastructure for long-term digital preservation (Digital Preservation System, DPS). It will be deployed alongside the existing Historical Archive System (HAS) and current archive system (CAS) and it will interface with both in order to exchange data.
- 2.6.3 The exchange of data consists of “receiving” data to be stored from the HAS/CAS or returning them. For this purpose the DPS will interface with HAS/CAS transparently,

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i.e. without human intervention except those necessary for maintenance and administration.

- 2.6.4 The interface between the systems will be composed by suitable APIs, which will join the existing software components and workflows, possibly without necessary changes. Any change, if necessary, should be minimal.
- 2.6.5 The DPS will be at least composed by the following functional components (see Figure 2-1):
- a. The current long term storage hardware platform. This is a 36 Tb EMC Isilon X200.
 - b. A conversion component transforming the format of the source document in formats suitable for long term preservation.
 - c. A management component interfacing with its APIs to the HAS/CAS and also permitting the HAEU's records manager or the ICT specialists to interact with the DPS for administration and maintenance operations.
- 2.6.6 The conversion and management components are presented in Figure 2-1 as part of an application server. However the hosting hardware platform will be made available by the ICT Service of the EUI and can be composed by one or, if necessary, more virtual servers.
- 2.6.7 The DPS will have to meet the following functional requirements:
- 2.6.8 Verify the "preservability" (long term integrity) of the SIP (Submission Information Package) delivered to the DPS
- 2.6.9 Guarantee (complete or partial) the recovery of the AIP (Archival Information Package):
- a. in case of intentional loss of data and/or malfunctioning of the system,
 - b. by recognizing loss due to malicious intrusion/alteration and/or malfunctioning of the system,
 - c. restoring of the correct functioning of the system and of the AIPs that have been lost/come under attack/or are malfunctioning.
- 2.6.10 Guarantee the non-alteration of the AIP(s):
- a. in case of both intentional alteration of data and/or malfunctioning of the system,
 - b. by recognising alterations of the AIP(s) due to malicious intrusion/alteration and/or malfunctioning of the system,
 - c. restoring the correct AIP in terms of Information Package and of the system that has produced alterations.
- 2.6.11 Track/find the documentary and/or archival units (or their single parts) using the components relating to AIP(s) (content + metadata + relationships).

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2.6.12 Read, reproduce and transfer Information Packages in order to track:

- a. obsolescence of formats (physical/digital/information objects), including obsolescence of formats of metadata and audit trails/logs,
- b. obsolescence of basic software that manages the preservation system (database, software that manages the digital repository, software for digital signature/validation of signature).

2.6.13 Grant access rights to Information content (including reading rights).

2.6.14 Permit auditing of all operations (manual/automatic/batch) both on AIP(s) and on each component of the DPS.

2.6.15 To ensure security and integrity of the DPS, its activities shall be documented in order to prove its suitability for the purpose of long-term preservation through:

- a. a list of requirements the DPS will fulfill/offer by means of a concise definition of the functional solutions and a complete documentation,
- b. the guarantees/requirements will have to be independent from specific technology/supports but rather guarantee differentiation of technology/supports solutions for each module and their portability/scalability/maintenance,
- c. automatic security copies.

2.6.16 Guarantee the trustworthy representations of what was originally stored by the use of digital timestamp based on digital signatures technologies / PKI (Public Key Infrastructure). This shall be applicable, in particular, in content syndication to manage and secure intellectual property right;

2.6.17 The IT storage hardware will be hosted in the EUI premise. For this purpose a technical room of 300 square meters has been built in a secured environment. A backup site will be available in a secondary site;

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2.7 Data model

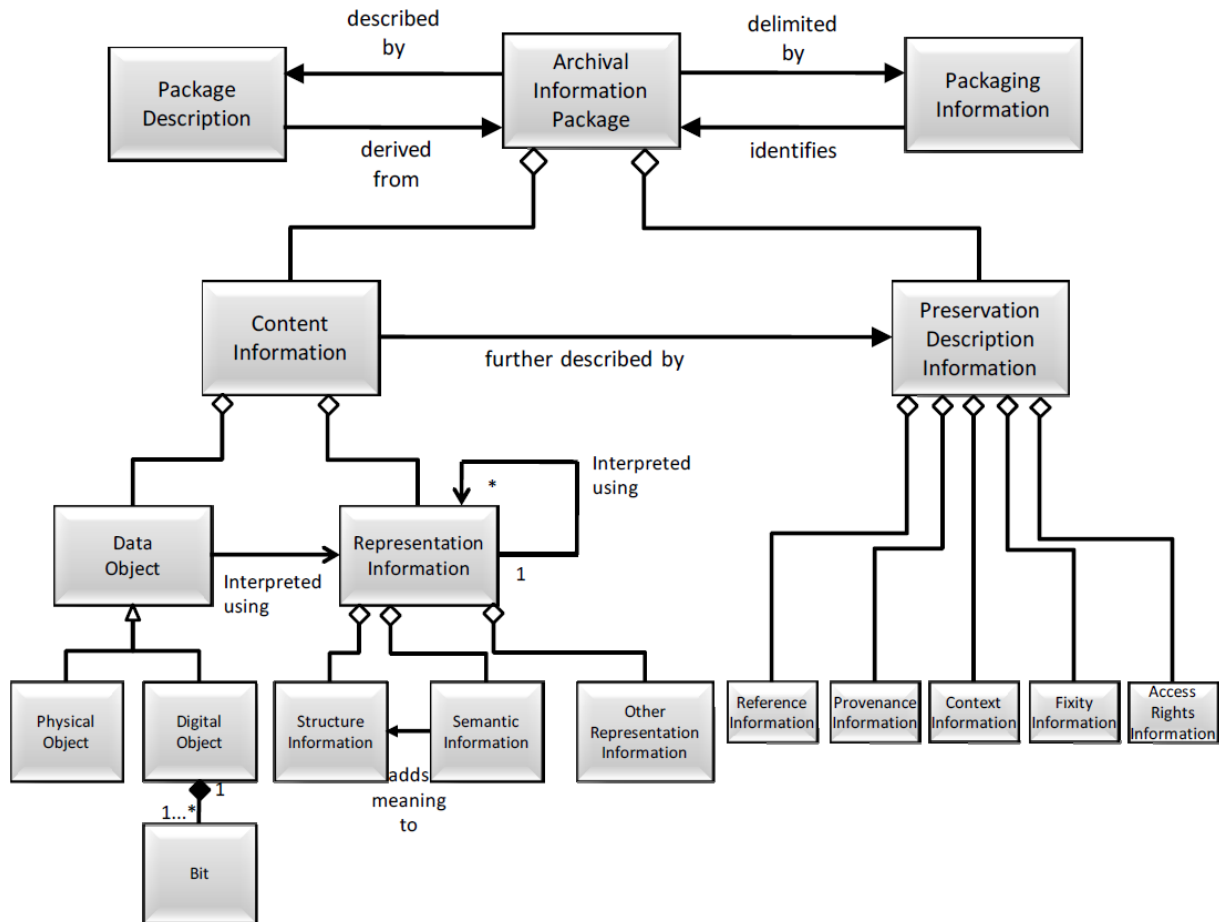


Figure 2-2

2.7.1 The functional model adopted by the Digital Preservation System (DPS) will be the Reference Model OAIS (Open Archival Information System) - ISO 14721:2003 with a few custom constructs like the AAI (See 2.7.13 2.7.17) to enable a unique reference to a document throughout its whole lifecycle.

2.7.2 In compliance with OAIS, the DPS will preserve each document not as a simple digital information object (file) but as an Information package composed of:

a. Content information:

- i. Data object (the file to be preserved)
- ii. Representation Information (the structure and semantic information required to access the information stored within a digital object)

b. Preservation Description Information (PDI):

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- i. Reference (an identifier for the Content Information)
 - ii. Context (the relationships of the Content Information to its environment, including why the Content Information was created and how it relates to other Content Information)
 - iii. Provenance (the origin or source of the Content Information, any changes that may have taken place since it originated/was created, and who has had custody of it since it originated/was created. Provenance provides context information such as fonds, archival units, series etc., as well as an audit trail for the Content Information contributing to evidence supporting its authenticity.
 - iv. Fixity (checks to ensure a particular Content Information integrity including digital signatures, checksum and special encoding and error detection schemes that are specific to instances of Content Objects)
 - v. Access Rights Information (access restrictions pertaining to the Content Information, including the legal framework, licensing terms, and access control).
- c. Packaging Information: a container within the DPS that contains two types of Information Objects, the Content Information and the Preservation Description Information (PDI).
- d. Package Descriptions: the set of information which is provided to support the finding, ordering, and retrieving of information holdings.

2.7.3 The DPS will be able to:

- a. create information packages composed of the digital object and related metadata; all these components will not necessarily be stored physically together but can be logically interrelated through a database.
- b. manage the filing system within which the information packages are logically located

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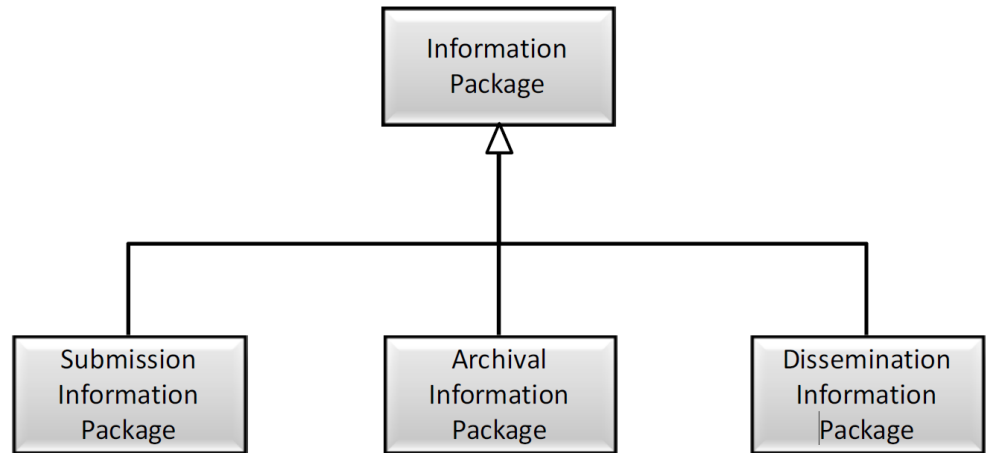


Figure 2-3

2.7.4 The Information Package may have multiple configurations depending on the phases and on the function of the archival process:

- a. SIP (Submission Information Package) is the package delivered to the DPS by Producers. Its form and detailed content is typically negotiated with the Producers.
- b. AIP (Archival Information Package) is a set of information that has, in principle, all the qualities needed for permanent, or indefinite, long term preservation of a designated Information Object.
- c. DIP (Dissemination Information Package) is the Information Package derived from one or more AIPs, produced in response to a request.

2.7.5 The DPS will be able to:

- a. specialise and clearly distinguish three types of information packages as provided here above.
- b. create SIPs, AIPs and DIPs as physically separate entities
 - i. These elements will be aggregated into Archive Information Collections (AIC) using criteria determined by the archivists.
 - ii. The AICs will be composed of hierarchically filed and/or based on common themes or origins and a common set of Associate Descriptions.
 - iii. The system must have at least one AIC which contains all the AIPs held by the DPS.

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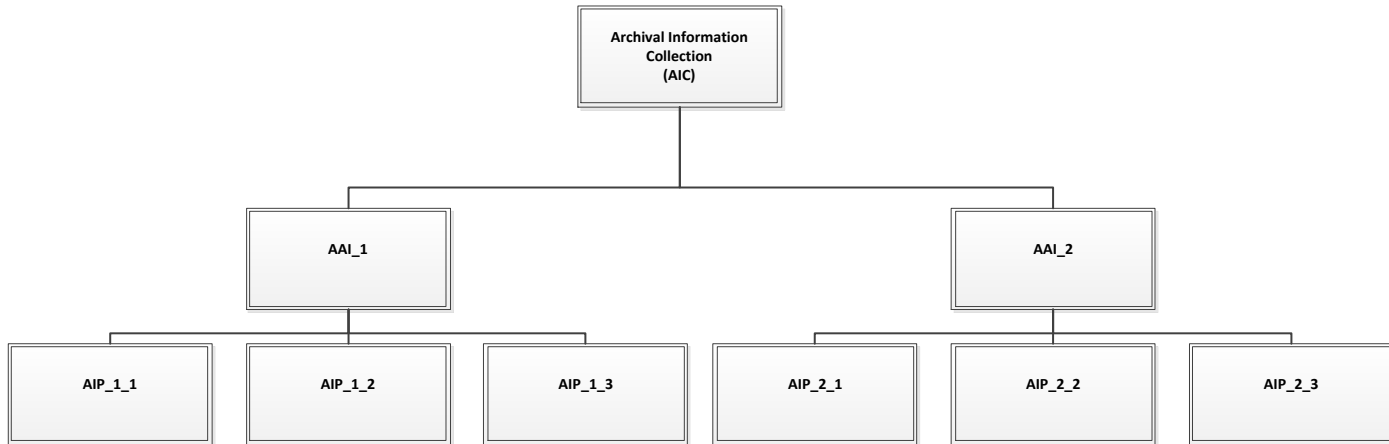


Figure 2-4

- 2.7.6 All relationships will be logical and must be linked via a pointer to another object in storage.
- 2.7.7 The AIC, as shown in the above figure, will be a complete AIP, which contains a PDI.
- 2.7.8 The PDI will provide further information about the AIC such as Provenance on when and why it was created, Context to related AICs, the desired level of Security/Fixity and Access Rights Information.
- 2.7.9 The DPS will be able to:
- a. manage the aggregated levels of the AIPs filing system
 - b. permit the preservation of metadata concerning to each level of description
 - c. allow that Package Descriptions (see above) will be stored in secure/long-term storage such as database management systems to enable easy, flexible access and update to the associated descriptions of an information package (SIP, AIP and/or DIP).
- 2.7.10 As shown before, the description metadata of an information package will be contained within the PDIs. The DPS will use the metadata included in the following standards:
- a. ISAD (International Standard for Archival Description)
 - b. ISAAR(CPF) (International Standard for Archival Authority Records; Corporate Bodies, Persons and Family)
 - c. METS (Metadata Encoding and Transmission Standard)
- 2.7.11 The combination of these sets of metadata will guarantee that the PDIs and the Representation Information will be effectively covered.
- 2.7.12 The DPS will be able to:
- a. manage at minimum the complete sets of metadata indicated in 2.7.10;

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- b. configure a customizable metadata set, including labelling and mandatory/optional fields;
- c. permanently link metadata specifications with the related digital object;
- d. implement/modify/cancel metadata at every stage of the information package lifecycle.

2.7.13 In addition to the Package Descriptions that will contain the persistent ID of the information package itself, all the information needed for the operation of the DPS will be stored in the database as persistent element, that will contain all the various types of 'data management information': the **Archive Administration Information (AAI)**. It must be noted that AAI is not part of the standard OAIS.

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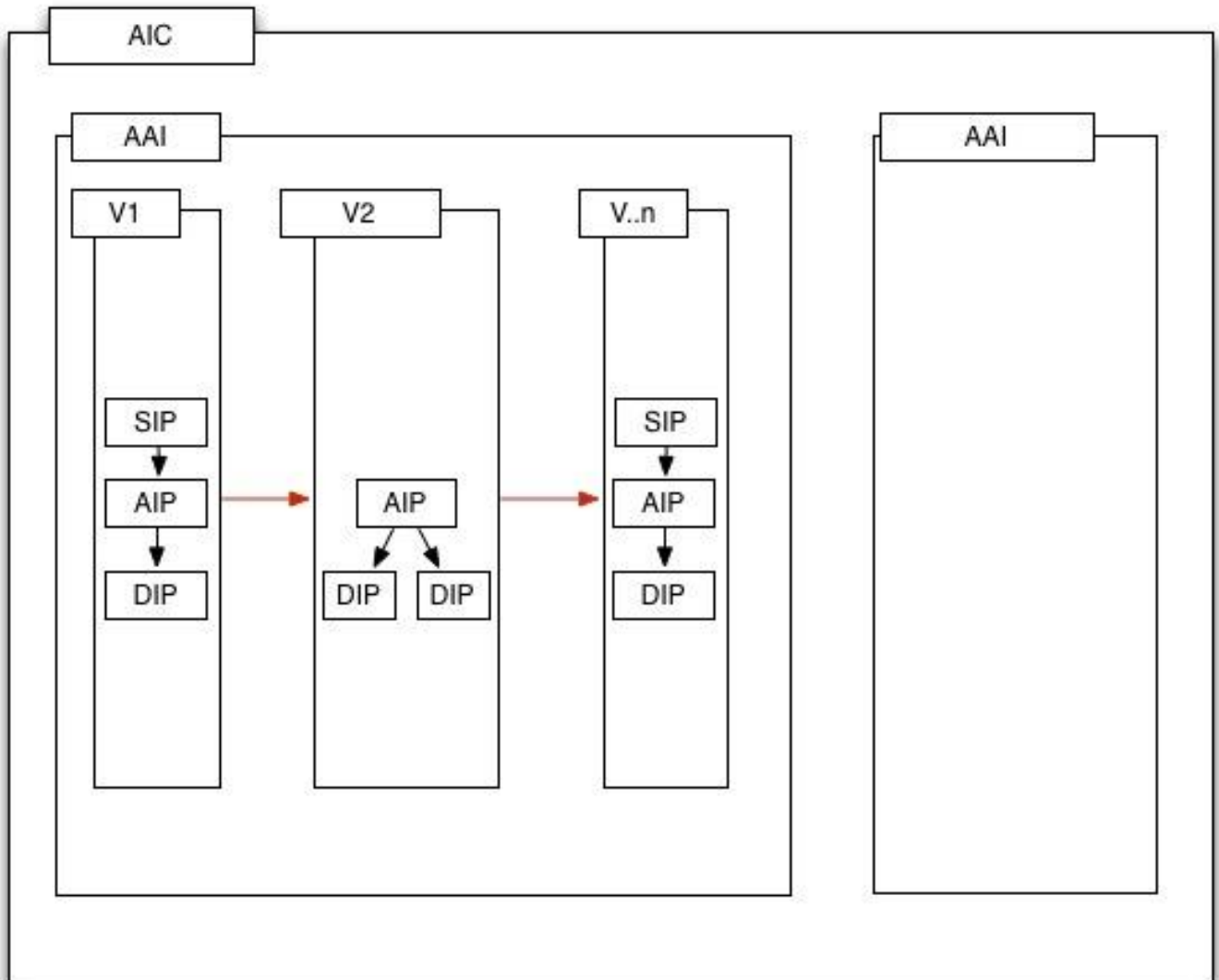


Figure 2-5

2.7.14 The AAI will serve to gather up the entire range of information required for the day-to-day operation of the life cycle of information packages. This entity will generate and implement automatically log-files for every action taken upon the information package(s), such as modification or deletion.

2.7.15 The **Archive Administration Information (AAI)** will be an information container that will support the processes affecting each information packages. It will be the reference and collection point for all the events and metadata concerning them. In particular the system will assign automatically a **persistent identifier** that will be used to all the queries sent by the external information systems.

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2.7.16 Once an access request is sent by an external information system, the DPS will process it as follows:

- a. The query will report at least the ID of the Archive Administration Information,
- b. The DPS will be able to identify all the information packages (SIP, AIPs and DIPs) that refer to a single Data object.
- c. The DPS will be able to perform:
 - i. Operations by default, by getting the latest version of DIP stored in the DPS,
 - ii. Customised actions, queried by the external information system.

2.7.17 The DPS will be able to:

- a. store permanently a unique identifier for each AAI,
- b. store permanently a unique identifier for each version of SIPs, AIPs and DIPs,
- c. store permanently the relations between the IDs of the AAIs and the information packages IDs,
- d. store permanently log-files for every action taken upon the information package(s) (such as modification or deletion).

2.8 Preservation workflow

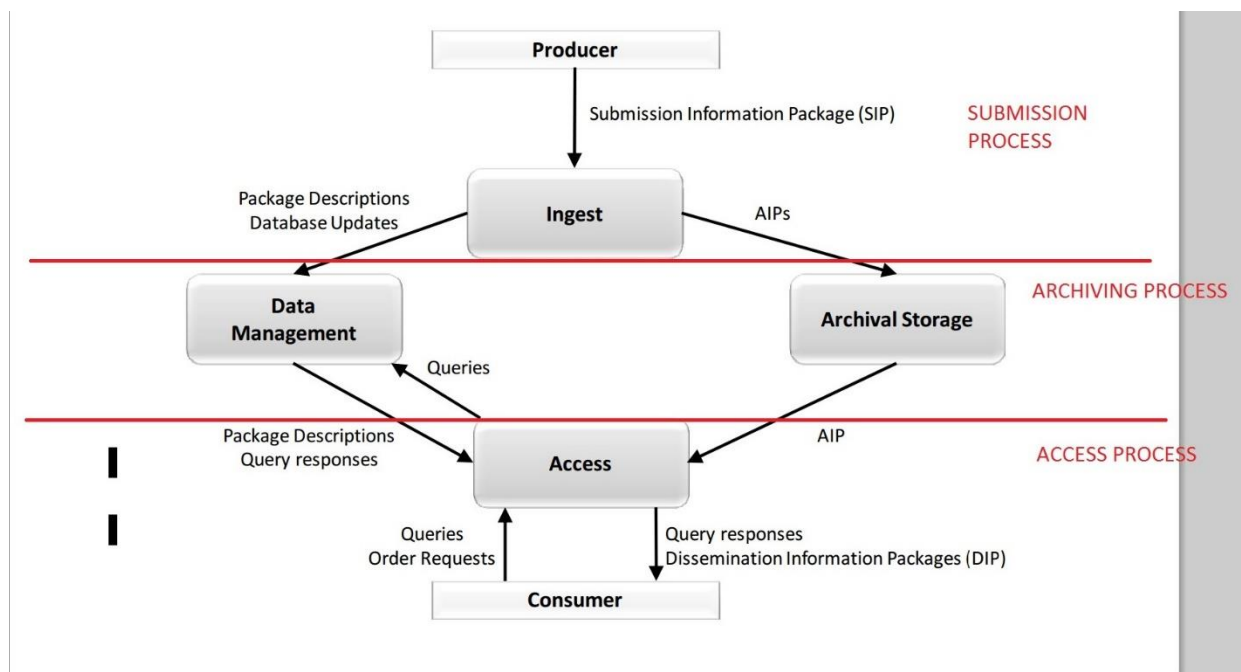


Figure 2-6

The previous section concerned the data model of the Information packages contained in the DPS. This section looks at the transformations, both logical and physical, of the Information

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Package and its associated objects as they follow a **lifecycle** from the Producers to the DPS, and from the DPS to the Consumer.

2.8.1 As shown by the figure here above, this workflow will consist of three different steps:

- a. **Submission**: including all the operations of ingesting the Information packages from the Producers (SIPs) **and creating the AAI object**.
- b. **Archiving** including the storage of data objects and related metadata finalised for long-term preservation (AIPs).
- c. **Dissemination**: including all the operations to create Information packages finalised for external access (DIPs).

2.8.2 The DPS will be able to:

- a. manage separately three phases (see above) that will correspond respectively to three different "baskets", in which the information packages will be treated,
- b. provide specific triggers when each information package must be processed,
- c. provide warnings addressed to the Administrator when the trigger will be turned on.

2.8.3 According to the figure shown above (Figure 2-1 : High-level future application model), the DPS will include three ways of external access identified with the term Producers:

- a. The Historical Archives System,
- b. The Electronic Records Management System,
- c. The External Producers: This last entity refers to the need to manage external (authorised) requests for ingesting SiPs within the DPS.

2.8.4 The DPS will be able to:

- a. ingest automatically SIPs deriving from authorised external systems,
- b. ingest manually SIPs uploaded by the Administrator; in this case multiple files selection and/or drag and drop functionalities are provided to facilitate the ingesting process.

2.9 The Submission Process

2.9.1 The DPS will accept Producer data according to a submission agreement. The data submission will be made both **automatically** or **manually**.

2.9.2 The **access restrictions** will be customisable and based on these elements:

- a. **data model content**, that specifies which elements are mandatory for the Representation information and the PDI's format,
- b. **scheduled arrival times** of the Submission Information Package (SIP).

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- 2.9.3 Within the DPS one or more **data submission sessions** can be specified and automatically scheduled. Each submission session will contain one or more SIPs delivered via:
- a. physical media,
 - b. telecommunication sessions,
 - c. a layer of services communicating with the external information systems.
- 2.9.4 The number of data submission sessions between the DPS and the Producers must be customised and can range from a single session to multiple sessions a day.
- 2.9.5 Each SIP in a data submission session is expected to meet minimum requirements for completeness. Therefore, the DPS will automatically perform **controls** on every SIP sent by the Producers. In particular:
- a. syntactic compliance with the metadata considered as mandatory,
 - b. format correspondence to the **list of allowed formats**.
- 2.9.6 The mandatory metadata to be checked before ingesting a SIP are the same foreseen by the archival and technical standards (see the paragraph 2.7 – Data Model). In particular, here below in para 2.9.8 follow the mandatory elements for each set of metadata.
- 2.9.7 it is reminded that the ingesting process comprises not only the transfer of the information package(s) (SIPs) but also their related metadata. The logical association between the metadata (described here below) and the digital objects to be stored, is identified by the meta-model **METS** (Metadata encoding and transmission standard): this standard provides an XML schema capable to incorporate diverse metadata sets (EAD, EAC, PREMIS) and the digital objects.
- Therefore, the DPS will be able to guarantee two modalities of data transmission:
- a. Automatically through the external systems,
 - b. Manually by the direct intervention of the Administrator.
- 2.9.8 The DPS will be able to manage the transfer through the METS metadata set, optional in the first case and mandatory in the second case.

EAD:

```
<ead>
  <eadheader>
    <eadid>[...]</eadid>
    <filedesc>
      <titlestmt>
        <titleproper>[...]</titleproper>
      </titlestmt>
```

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```

</filedesc>
</eadheader>
<archdesc level="fonds">
  <c level="file">
    <did>
      <unitid type="Original Reference Code"> </unitid>
      <unitid> </unitid>
      <unittitle></unittitle>
      <physdesc>
        <extent></extent>
        <langmaterial encodinganalog="3.4.3"><language langcode=
scriptcode="Latn">
          </langmaterial>
          <physfacet type="material"> </physfacet>
        </physdesc>
        <unitdate type="inclusive" datechar="date
range"></unitdate>
      </archdesc>
    </ead>
  
```

If present, the **EAC** record must contain the following elements:

```

<eac-cpf>
  <control>
    <recordId></recordId>
    <maintenanceStatus> </maintenanceStatus>
    <maintenanceAgency>
      <agencyName> </agencyName>
      <agencyCode> </agencyCode>
    </maintenanceAgency>
    <languageDeclaration>
      <language languageCode=""> </language>
      <script scriptCode="Latn"> </script>
    </languageDeclaration>
    <maintenanceHistory>
      <maintenanceEvent>
        </maintenanceEvent>
      </maintenanceHistory>
    <cpfDescription>
      <identity>
        <entityType> </entityType>
        <nameEntry localType=""> </nameEntry>
      </identity>
      <description>
        <existDates>
          <dateRange>
            <fromDate> </fromDate>
            <toDate> </toDate>
          </dateRange>
        </existDates>
      </description>
    </cpfDescription>
  </eac-cpf>
  
```

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```

        </description>
        <relations>
    </cpfdescription>
</eac-cpf>

```

With regards to **PREMIS**, the DPS must be capable to automatically compile the File and the Agent entities, namely:

```

fileSize
FormatDesignation
    formatName
    formatVersion
FormatRegistry
    formatRegistryName (this semantic unit must refer to PRONOM1 registry)
    formatRegistryKey (PRONOM Persistent Unique Identifier2)
byteOrder
Compression
    compressionScheme
    compressionSchemeLocalList
    compressionSchemeLocalValue
    compressionRatio
Fixity (in case a digital signature has been applied)

agentIdentifier
    agentIdentifierType
    agentIdentifierValue
agentName
agentType
agentNote
agentExtension

```

2.9.9 The Agent entity will be used to refer to the viewer software and to the operating system. A one-to-more relation between the digital object (SIP, AIP, DIP) and the Agent (viewer or operating system) must be established.

2.9.10 Only if these controls are successful, the DPS will take in charge the SIPs and automatically generate the entity AAI.

2.9.11 The passage of the next stage is triggered by the **acceptance of the Administrator**. The AAI will report the date and the hour when it occurs and a **report file** is automatically generated with:

- a. date and hour
- b. the list of SIPs accepted
- c. the AAI identifier

2.9.12 The DPS will be able to:

¹ <http://apps.nationalarchives.gov.uk/PRONOM/Default.aspx>
² <http://www.nationalarchives.gov.uk/aboutapps/pronom/puid.htm>

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- a. recognise automatically the digital formats of SIPs and perform the controls as described above
- b. deny the ingest of SIPs with formats that do not belong to the list of allowed formats
- c. deny the ingest of SIPs with missing mandatory metadata elements
- d. permit the configuration of the list of allowed formats
- e. generate automatically the AAI (and its ID) as described here above
- f. generate report files to be sent out to the Producers
- g. manage through an interface the bulk of SIPs and allow the Administrator to apply the needed operations
- h. update the AAI with the actions performed on the SIPs

2.10 The Archiving process

2.10.1 Once the Administrator accepts the SIPs, the DPS is required to perform the mapping between SIPs and AIPs that could be a relation one-to-one or one-to-many (1:1; 1:n; n:1). At this stage, the SIPs received in the data submission session can be transformed into a set of AIPs and Package Descriptors, which will be stored onto the servers and the database underpinning the DPS. The process consists of:

- a. identifying the Content Information, PDI and Package Descriptors
- b. create the AAI for each SIP ingested (so only one AAI is generated for each SIP)
- c. queuing them for storage and for the database processing
- d. classifying them and determining in which existing collection or collections each object belongs

2.10.2 The first three operations will be performed automatically by the system. The last one will be set manually by the Administrator.

2.10.3 Collections descriptions are automatically updated after the AIPs are stored.

The module will coordinate the updates between the database and the storage and provide appropriate coordination and error recovery.

2.10.4 If any error is encountered at this stage, the Administrator will trigger the deliverance of AIPs to the storage (server). This feature is necessary to track the correct archival process execution. The confirmation of that operation will include:

- a. a unique identification to retrieve that AIP from storage
- b. the update of the AAI

2.10.5 Digital Migrations that require changes to the digital objects will create a new AIP version of the previous AIP. The first version of the AIP is referred to as the original AIP and must be retained for verification of information preservation.

2.10.6 The changes that might occur within an AAI, are:

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- a. Replacing a digital object (file) with a new one
- b. Merging two or more AIPs from different AAI within an AIP
- c. Merging a newly ingested SIP with an AIP
- d. Deleting a SIP
- e. Deleting an AIP
- f. Deleting an AAI

The first three operations will trigger the creation of a new AIP version.

2.10.7 If modifications affect only the metadata (PDIs), the system will be able to update exclusively the database without creating new AIP versions.

2.10.8 At a later stage the DPS will store the AIPs produced previously and will merge them into the permanent storage.

2.10.9 In addition to this, the DPS will manage the conversion of digital formats according to the table here below

Format category	Original/ Creating Application	Primary Preservation Format	Secondary Preservation Format
Audio	- mp3 - wav	Free Lossless Audio Codec (flac)	
Email	- Outlook Mail Message (msg)	XML and XSL files are created for each email. Any attachments are converted according to the appropriate preservation file format.	Email (eml)
Image – raster	- Jpeg - Tiff - PDF	- PDF/A - Tiff - FITS	- Portable Network Graphics (png)
Office documents	- .xls, .xlsx, .xlt - .ppt - .rtf - .doc, .docx, .dot	Open Document Format (.odf)	OpenOffice.org XML
Website Archive	MIME HTML (mht)	Web ARChive (warc)	ARC file format (arc)

Table 2-1

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- 2.10.10 A tool **must** be provided for the conversion from the original creating application to the primary preservation format listed here above. A secondary optional preservation format **may** be provided.
- 2.10.11 In addition to the converters here above, the system will be able to store other formats, if present within the list of allowed formats: these digital objects (for instance, .mp4, .mov, .avi, .mht, .warc, .arc) will be stored without prior conversion, for “passive” preservation purposes. However, the DPS shall be able to manage the entire cycle (from SIPs to DIPs) and associate metadata and viewer application to each information package.
- 2.10.12 For each preservation format the system will apply cyclic controls in order to check the capability of the viewer to read the corresponding file format.
- 2.10.13 In case a file format is no longer intelligible, the system will provide appropriate warnings to the Administrator, who will migrate the digital content of AIPs to a new format. The system will create a new version of AIP that will not imply necessarily a modification of its metadata; However, a new ID will be generated and associated to the corresponding AAI.
- 2.10.14 The DPS will be able to:
- a. manage through an interface the bulk of AIPs and allow the Administrator to apply the needed operations
 - b. manage one or more versions of the same AIP
 - c. recognise automatically the digital formats of AIPs and perform the cyclic controls in order to check their digital intelligibility
 - d. generate the appropriate warnings to the Administrator whenever a viewer application will not be able to read the corresponding digital format
 - e. convert the accepted file formats according to the table Table 2-1
 - f. Create a new version of the AIP and DIPs within the AAI
 - g. update automatically the AAI (and its ID)
 - h. generate report files to be sent out to the Producers

2.11 The Access process

- 2.11.1 The access module within the DPS will offer a Filing plan that will present to the Administrator a logical view of the DPS holdings so the Administrator can decide which AIPs to acquire.
- 2.11.2 The Access operations can be performed both manually and automatically.
- 2.11.3 Manual Access: the module will allow search sessions, which will allow the Administrator to use the Filing plan to identify potential information packages. When candidate objects of interest are identified, a set of filters based on the supplied metadata may be used to further refine a result set.

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2.11.4 Once the Administrator identifies the DPS holdings to acquire, the Administrator will use a specific service to develop an order request to acquire the data. The DPS will produce a logical view of the desired AIPs and associated metadata and will allow defaults settings applicable to the search sessions.

2.11.5 Automated Access: the system will allow, if authorised, the external information systems (Producers) to query directly the DPS. The Producers must refer to the persistent ID of the AAI. On the basis of the ID and relations within the AAI, the system will retrieve the latest version of the AIP, if present, then it will automatically create a new information package (DIP) that will by default be composed of Data object, as it was at submission stage, and a minimum set of metadata configured a priori by the Administrator.

2.11.6 The DPS will be able to:

- a. manage through an interface the bulk of DIPs and allow the Administrator to apply the needed operations
- b. manage one or more versions of the same DIP
- c. update automatically the AAI (and its ID) whenever an action is performed on the DIP
- d. generate report files to be sent out to the Administrator
- e. browse through the filing plan where AIPs are stored and package DIPs on the basis of digital contents and metadata provided by the system.
- f. perform automatic operations with the external information systems (Producers) in order to exhibit the digital contents when requested
- g. Provide a REST API that interacts with the AAI's responding at least in JSON and XML. It will be possible to request a specific version, and the result should be the proper DIP package. If a DIP package is not generated or cannot be generated because of missing information, it should return the SIP package. This is to ensure that the Producer applications can respond with a document on request regardless of the Archiving procedures.
- h. The response time will be of the order of 50ms for a document of approx. 1 Gbytes (apart from the networking time of attached documents).

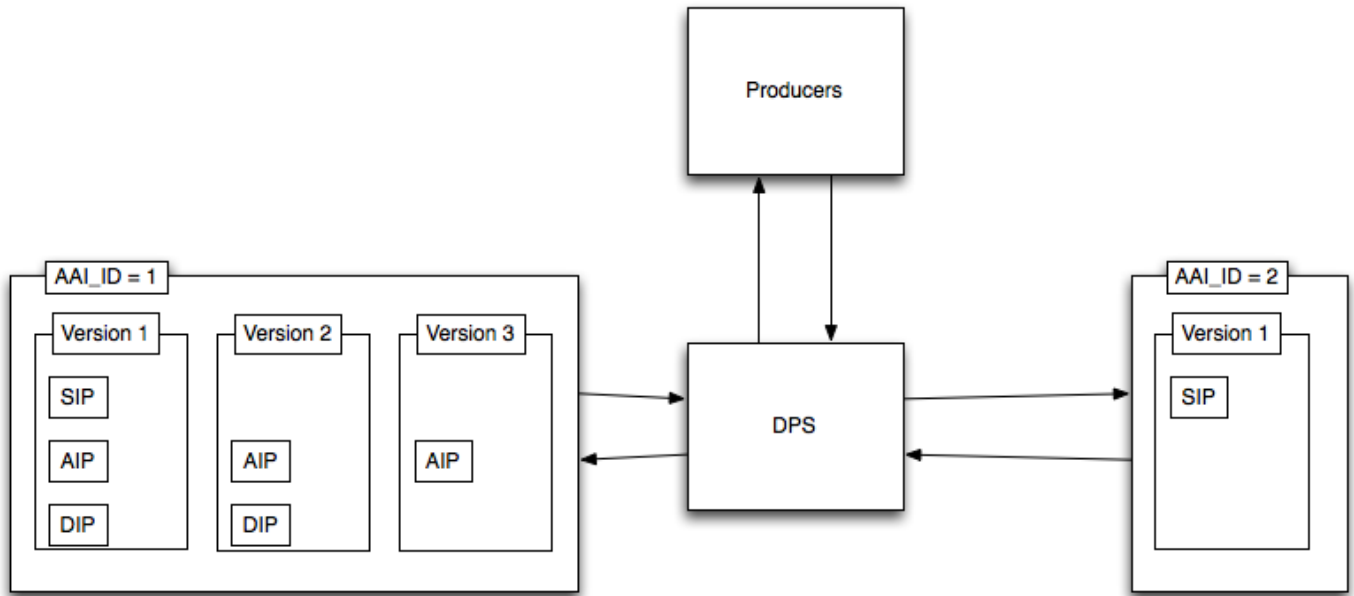
Some examples of API user cases

- a. [*GET 1.pdf*] : **DPS** returns the Latest Version (**Version 3**), and because it has no **PDF DIP**, it will generate one on the fly, store it and return it
- b. [*GET 1.pdf?version=2*]: **DPS** returns the **PDF DIP** for **Version 2**

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- c. [GET 2.pdf]: **DPS** finds no **PDF DIP**, it searches for an **AIP** (to generate the respective **DIPs**) but does not find it, and therefore returns the **SIP** indicating that the document result is a SIP



2.12 The Export process

- 2.12.1 The DPS will provide the capability to export information held in its repository: the set of digital objects and associated metadata must be exported any time in an intelligible format.
- 2.12.2 Due to the hierarchical nature of the system every information package within the Filing system, will export the folder, its contents, and all sub-folders. Metadata (including file logs) must be exported in a XML file.

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3 PROJECT GUIDELINES

- 3.1.1 The project implementation and the documentation will be delivered in English language.
- 3.1.2 The project will be based on several releases divided into concrete activities in order to minimize the disruption of the HAEU's activities, to maximize the resource utilization and to allow a smooth deployment in a controlled manner and step-by-step.
- 3.1.3 The project will include an on-site project initiation phase of at least 2 (two) weeks at the HAEU in Florence.
- 3.1.4 The project will include an on-site delivery phase of at least 1 (one) week, including training on-the-job sessions at the HAEU in Florence.
- 3.1.5 The company will deliver a full set of well formatted and coherent documents describing at least: Technical Structure, Functional Principles, Administrative Operation and User Operations.
- 3.1.6 The first delivery will be in production within 12 month from the signature of the contract.
- 3.1.7 The last delivery will be in production within 36 month from the signature of the contract.
- 3.1.8 If an API is available, documentation shall be provided and it should be specified in which language.
- 3.1.9 If access to the APIs carry additional costs this shall be detailed in the Company's Economic offer.
- 3.1.10 The Company shall describe the applications development environment in detail.
- 3.1.11 The project will support scopes: HAEU contains at the moment approximately 220.000 paper files with an approximate 2 million pages , of which 13.000 have been digitised. Also the holdings comprise approximately 10.000 analogue photographs, which are being digitised and around 1.000 audio (and video) recordings, mixed analogue and digital, all planned or in process of being being digitised;

3.2 Environment & design constraints

- 3.2.1 The Company will describe the authentication and user access logging. The use of any standards, such as single-sign on, shall be indicated in the description.
- 3.2.2 The application shall manage errors in a systematic way. The application must avoid system errors being displayed on the end-user interface and give meaningful errors to the administrator. Errors should be logged centrally.
- 3.2.3 The Company shall describe how the application will manage errors.

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3.2.4 The Company will assist the HAEU with data migration.

3.2.5 Detailed information regarding the database schema will be delivered.

3.3 Application administration

The application Administration modules and functions are defined below.

3.3.1 Default groups will be created on the basis of AD/LDAP groups. The system should enable administrators to filter/view and manage groups easily.

3.3.2 It shall be possible to create new groups and add existing groups or single users.

3.3.3 Access rights will be managed with roles. A role will be defined through the application's administrative area. A role is set of predefined access rights to different types of data per group. Users of the system will be assigned one or more role, the role with greater rights will override those with less rights.

3.3.4 Access to functions and modules will be granular and defined for each role.

3.3.5 In order to facilitate system management, the system should present and allow editing of the various access rights and roles as follows:

a. By listing roles

b. By listing group and modules/functions and the associated roles, and the roles' access rights

3.3.6 There will be three main predefined roles that will be available as basic templates for creating new roles:

a. Application Administrators

b. Record administrators

c. Record viewers

3.3.7 To facilitate administration of access rights it will be possible to duplicate existing role definitions, which then can be modified.

3.3.8 Usernames and passwords shall be read with an AD/LDAP lookup. Through the Application Administration interface it will be possible to assign a username with a defined role.

3.3.9 It will be possible to allow alert events to trigger user notifications via business process logic, emails, SMS or equivalent short messaging system.

3.3.10 To support administration, data protection/integrity and workflow processes certain actions within the application will be logged. It shall be possible to define what should be tracked and logged through the application interface. This type of function would be available to application administrators only, as defined in the user access

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3.3.11 Access to the application and modules will be logged. For the following actions, username, module, day, time, old and new values for the following data:

- a. Changes to role definitions
- b. Changes to access rights
- c. Changes in the database triggered by manual intervention

3.3.12 It will not be possible to add or remove tracking and logs of actions

3.3.13 The company shall describe how the application can achieve the above requirements.

3.4 Maintenance, support

3.4.1 The Company will guarantee preventive maintenance over the period of duration of the contract. In particular it will take care of the operating system upgrade and of the database upgrade when these are required to keep up with evolution of the EUI IT infrastructure (usually bound to the need to remain in sync with the market evolution) and of the possible upgrade of the application to remain compatible with the above.

3.4.2 The Company will guarantee corrective maintenance throughout the duration of the contract.

3.4.3 At the end of the contract the Company will guarantee the delivery of documentation (know-how transfer) and the hand-over of the system to a potential newsupplier.

3.5 Transcripts, Reporting, Statistics

3.5.1 It will be possible to generate reports about the health of the database (e.g events that require an intervention to rebuild corrupted data), its history of access/modifications and its status (e.g. structure, size, growth, average number of accesses, number of document uploads and downloads).

3.5.2 Filtering, merging to word, email using email address, etc., shall be possible.

3.5.3 Predefined reports (up to 5 reports) will be available as part of the implementation.

3.5.4 The Company will describe what features the application has in order to facilitate creating reports. For example, the possibility to print what is presented on the screen in a printable format.

3.5.5 The Company will describe which reports, if any, are part of the implementation, which reporting tools they recommend and which reporting tools other customers are using.

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4 SUBMISSION AND EVALUATION OF OFFERS

4.1 Procedures for submitting an Offer

- 4.1.1 Offers must be submitted in English or Italian. Both the Technical and the Economic Offer shall be signed by the Company's legal representative, and must be perfectly legible, so as to avoid the risk of ambiguities and misunderstandings.

Offers shall be sent to the following address:

**EUROPEAN UNIVERSITY INSTITUTE
PROTOCOL OFFICE
Via dei Roccettini, n. 9**

**50014 San Domenico di Fiesole (FI)
Italia**

- 4.1.2 The entire documentation for the bid shall be sent in a sealed package, on pain of exclusion from the tender procedure. The package must be sent via express courier (the date on the delivery slip to the courier shall be considered as the delivery date), or delivered by hand to the EUI's Ufficio del Protocollo, the incoming mail registration service (opening hours: Monday-Friday 8.30 am – 1 pm and 2 pm – 5 pm), no later than **3 pm on 26 Jan 2016** (absolute deadline). Any other means of delivery and/or shipment shall warrant exclusion from the tender procedure.

- 4.1.3 All Tenderers are required to notify the EUI that they have sent a bid, by writing to the e-mail address

HAEU.Tender@EUI.eu

The Institute shall acknowledge receipt of this message.

- 4.1.4 Once the Offer has been received by the Contracting Authority, all documents become the property of the Institute and shall be treated with the strictest confidentiality.

- 4.1.5 On pain of exclusion from the tender procedure, every Offer submitted must comply with the following instructions.

a. Offers must be submitted according to the method of the double envelope.

b. The outer envelope must be sealed with adhesive tape and signed across the tape. It must contain the following information:

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- c. The code referring to this tender procedure: CFT/EUI/HAEU/2015/01;
- d. The title: Open Call for Tenders for a DIGITAL PRESERVATION SYSTEM OF THE HISTORICAL ARCHIVES of the EUROPEAN UNION
- e. The name of the Tenderer;
- f. The name and address of the Institute (see above).
- g. The inner envelope must bear, in addition to the name of the Service to which it is addressed, as indicated in these STS, the words 'Bando di gara — Non deve essere aperto dal servizio postale interno'. If self- adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across that tape.
- h. The content of the inner envelope must be subdivided into four envelopes, according to the following instructions, on pain of exclusion from the tender procedure.

4.1.6 **Envelope no. 1:** sealed with adhesive tape and signed across the tape, bearing on the outside the name of the Tenderer and the words "Envelope no. 1 – Administrative Documents"; this envelope shall contain 1 original on paper and 2 digital copies in PDF format, where possible text searchable, on a read only CD of the following documents:

- a. **Checklist**, filled in and signed (Annex A).
- b. **Request to participate in the tender procedure**, dated and signed by the Company's Legal Representative, or by a person entitled to sign on behalf of the Company; this request may only be submitted using Annex B.
- c. **Declaration on Honour** concerning the Company's legal status, signed by the Company's Legal Representative, using Annex C.
 In the case of a Temporary Grouping of Companies (TGC) the Declaration shall be signed by the Legal Representative of each of the Companies that have formed the Temporary Grouping for the purpose of submitting a bid for this tender.
 A photocopy of a valid identity document of the signatory shall be attached to the Declaration.
- d. Copies of the **Invitation to Tender Letter, of the Special Tender Specifications and of the Draft Contract**, without any additions, amendments

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or changes, initialled on each page and bearing the Tenderer's stamp and full signature of the owner or Legal Representative on the last page.

- e. In the case of an already established TGC: a special collective mandate with powers of representation, conferred upon the lead company by the participating companies in a certified private deed, which shall also be included, either in original or in an authenticated copy. Also included shall be a proxy, conferred upon the person that legally represents the lead company, as well as a statement by the lead company defining which portions of the service will be performed by the individual companies, including the lead company.
- f. In the case of a TGC not yet formally established: the undertaking, should the tender be awarded to this TGC, to confer a special collective mandate with powers of representation upon one of the companies (explicitly indicating which one), subsequently designated the mandate holder or the lead company, which will sign the contract in the name of and on behalf of itself and the others, as well as a statement as to which portions of the service will be performed by the individual companies, including the lead company (or designated as such).

No company shall participate in the tender procedure both as an individual company and as a member of a TGC, on pain of exclusion from the tender not just of the individual company, but of the entire TGC as well.

Companies that are in a controlling relationship (either as a parent company or as a subsidiary) with other companies participating in the tender procedure, may not participate in the tender procedure either as individual companies or as members of a TGC, on pain of exclusion not only of the individual company, but also of the entire TGC that they are a part of.

- g. **A provisional bid bond** for 2% of the presumed total amount of the tender.

The bid bond shall be a bank guarantee or insurance policy or a policy issued by financial brokers included in the registers of authorized brokers. The bid bond provides a guarantee against the risk that the contract may not be signed.

The bid bond shall be operational within fifteen (15) days, upon a simple written request by the Contracting Authority, and must have a validity of one-hundred-and-eighty (180) days from the deadline for submission of bids. The bid bond shall further contain the clause that it will only cease to be valid once the Contracting Authority has issued a specific release statement, even after the expiry date as described above. The bid bond must also envisage the waiver of the right to enforce prior payment from the main debtor.

No form of bid bond other than the above-mentioned will be accepted. Any tenderer submitting a guarantee issued by financial brokers that the Bank of Italy has forbidden from undertaking new transactions shall be excluded from the tender procedure.

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h. Anti-mafia self- certification

4.1.7 **Envelope no. 2:** sealed with adhesive tape and signed across the tape, bearing on the outside the name of the Tenderer and the words "**Envelope no. 2 – Technical Offer**"; this envelope shall contain 1 original and 2 digital copies in PDF format, where possible text searchable, on a read only CD of the following documents:

Technical offer with detailed description of the solutions and service offered.

In evaluating the Technical Offer, special consideration will be given to the level of detail, to the clarity and accuracy of the descriptions provided in the technical report.

The content of the envelope shall be structured with a detailed technical-organizational report describing the management and the provision of the service requested. This report shall not be longer than 50 pages, A4 format, with every element needed for a correct evaluation of the project clearly specified.

The Technical Offer shall be signed by the Tenderer's Legal representative.

Each and every element of the Technical Offer submitted shall be deemed an integral part of the contract, and the successful Company shall be obliged to comply with it.

The Tenderer must declare which information in the documentation is an industrial and/or commercial secret, and must therefore be considered strictly confidential.

Summary of the technical offer duly filled (Annex D)

Compliance matrix duly filled (Annex F)

4.1.8 **Envelope no. 3:** sealed with adhesive tape and signed across the tape, bearing on the outside the name of the Tenderer and the words "**Envelope no. 3 – Economic Offer**"; this envelope shall contain 1 original and 2 digital copies in PDF format, where possible text searchable, on a read only CD of the Economic Offer, to be detailed in the form Annex E, and signed by the Company's Legal representative.

The Offer must provide an overall price for the services described in Articles 2 and 3 of these tender specifications.

Each Economic Offer submitted shall be assessed in a comparative evaluation together with all Offers received. Scores will be assigned according to the detailed scoring criteria described in Article 4.7.6.

4.1.9 **Envelope no. 4:** sealed with adhesive tape and signed across the tape, bearing on the outside the name of the Tenderer and the words "**Envelope no. 4 – Further**

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documentation"; this envelope shall contain 2 digital copies in PDF format, where possible text searchable, on a read only CD of any other document, providing additional information in support of the Offer, that was not explicitly mentioned as being part of the content of the other envelopes (e.g., brochures, illustrated prospectuses, etc.).

4.2 Additional information concerning the submission of Offers

- 4.2.1 All the documentation explaining the procedure for participating in this tender can be accessed by anyone interested at: www.eui.eu/About/Tenders.aspx
- 4.2.2 Any queries or requests for clarifications, submitted by the tenderers in order to ensure they have a clear understanding of the content of the documents, must be addressed to HAEU.Tender@EUI.eu and sent no later than **3 pm on 22 Dec 2015**. Any query or request for clarification received within this deadline will be answered: the queries will be posted, without identifying the sender, together with the answers, on the webpage of EUI Tenders (see above).
- 4.2.3 Envelopes containing offers are sent at sender's risk, and the EUI takes no responsibility for any package that does not reach its destination within the deadline.
- 4.2.4 No remuneration or reimbursement shall be due to the companies for having drawn up their bid, for having elaborated projects or for having supplied any other documentation as part of their bids.
- 4.2.5 None of the documentation submitted for the tender procedure will be returned, not even that pertaining to bids that were not awarded the contract.
- 4.2.6 The name of the Tenderer who is awarded the contract shall be published on the Institute's website. Subsequently, all the companies participating in the tender procedure will be duly informed of the results.
- 4.2.7 The Institute reserves the unappealable right to cancel the tender procedure, or to extend its deadline, and none of the companies participating in the procedure can exercise any right over these decisions.
- 4.2.8 Neither the award of the tender, nor the invitation to participate in the procedure, imply an obligation upon the Institute to sign the contract.
- 4.2.9 Tenderers are reminded that false statements will lead to criminal charges. The Institute will check the truthfulness of information contained in the statements and declarations submitted; should any such statement be found to be untrue, the tenderer shall lose any benefit that may have been gained and the Institute shall enforce and

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take possession of the bid bond put up by the tenderer, as well as submit a formal report to the authorities denouncing the criminal offence.

4.2.10 In compliance with the Institute's internal regulations on Data Protection, which can be consulted at www.eui.eu/AboutTheWebsite/DataProtection.aspx, all personal data and information provided by tenderers and candidates shall be used exclusively for the purposes of this tender procedure.

4.3 Opening of Offers

4.3.1 The opening of the Offers shall ascertain that:

- a. Offers were submitted within the established deadline;
- b. Offers submitted were presented in the form requested, using the "method of the double sealed envelope" (as specified in Article 4.1).

4.3.2 The Institute will not hold public sessions for the opening of the Offers.

4.4 Grounds for exclusion

4.4.1 Tenderers shall not be in any of the following situations, which are grounds for exclusion:

- a. is bankrupt or being wound up, is having its affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
- b. has been convicted of an offence concerning grave professional misconduct by a final judgment of a competent judicial authority or administrative decision or decisions of international organisations.
- c. is not in compliance with its 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 it is established or with those of Italy being the country of establishment of the Institute or those of the country where the contract is to be performed. This breach needs to have been established by a judgment or administrative decision having final and binding effect in accordance with the legal provisions of the country in which the economic operator is established or of Italy being the country of establishment of the Institute.

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- d. has been the subject of a final judgment for fraud, corruption, involvement in a criminal organisation, money laundering, terrorist-related offences, child labour or other forms of trafficking in human beings or any other illegal activity, where such illegal activity is detrimental to the Institute's financial interests.
- e. has been in serious breach of a contract financed by the Institute or has been the subject of an offense of serious irregularity established by a final judgment of a competent judicial authority or administrative decision.
- f. is subject to an administrative penalty for being guilty of grave professional misconduct, or for having made substantial errors or committed irregularities or fraud, or has been declared to be in breach of its obligations under contracts covered by the Institute's budget (Article 41 of the EUI's Public Procurement Regulation (President's Decision No. 44/2014 of 5 December 2014)).
- g. Anti-mafia self- certification. Whether the successful tenderer has its registered office in Italy, the Institute reserves the right to request the competent Prefecture to issue the related Anti-mafia certificate.

4.5 Documents proving eligibility in relation to the grounds for exclusion listed above:

- 4.5.1 The Contracting Authority will accept, as satisfactory proof that the tenderer is not in any of the situations described above, a formal signed Declaration on Honour concerning exclusion criteria, as in Annex C.
- 4.5.2 The Institute reserves the right to verify the accuracy of this information and to request documents providing further evidence before the contract is signed.

4.6 Selection criteria

- 4.6.1 To be eligible for the tender procedure, companies must possess all the following requirements. Companies in default in even one of the requirements listed below will be excluded from the procedure.
- 4.6.2 General requirements
 - a. Enrolment in the Chamber of Commerce, Industry, Arts and Crafts Registry of Companies (CCIAA), or in an equivalent registry in the country where the Company has its official and legal headquarters, registered as practicing business activities in the field that is the object of this tender procedure, or at least a field that is consistent with the object of the tender.

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- b. To be in compliance with the provisions aimed at legalising the position of undeclared employees (Individual legalization plans - Piani Individuali di Emersione).
- c. To be in compliance with all obligations relating to the payment of social security and insurance contributions in favour of its employees, in full observance of existing legislation; and to apply the employment conditions envisaged in the sector's national collective labour agreement.
- d. To be in compliance with the labour regulations applicable to people with disabilities.
- e. To undertake, in the event it is awarded the tender, to provide any and all required documentation in order to prove that it is fully up-to-date in its payment of social security and insurance contributions (e.g., through a DURC certificate), in compliance with existing legislation.
- f. Declaration confirming that it has taken note of all general, particular and local circumstances, barring none, and of all other elements which may directly or indirectly influence the performance of the service, or the calculation that has led to the Offer submitted with its bid; and that this Offer is profitable, and that the Company undertakes to hold said Offer valid and binding for one- hundred-and-eighty (180) days, starting from the deadline for submission of its bid.

4.6.3 Technical, economic and financial capacity requirements

- a. To be in possession of two (2) bank references from prime banks, or financial companies included in the registers of authorised brokers, issued after the date of the Invitation to tender and the publication of these Tender Specifications, proving that Tenderer has always met its economic and financial obligations punctually and regularly.
- b. To be in possession of a specific employer liability and public liability policy concluded with a leading insurance company for the life of the contract, maximum insured at least €1.000.000 (one million/00).
- c. To be in possession of a stable financial position: possession of two (2) bank references issued by major bank or authorized, dated after the invitation to the present Letter of Invitation, in which it is shown that the company has always met its commitment with regularity and punctuality and to be in possession of the economic and financial capacity to perform the services forming the object of the tender.
- d. To have generated an annual turnover in the last 3 closed financial years of at least € 600.000 (six hundred thousand/00) VAT excluded.

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- e. Where (4.6.3.d) cannot be provided, a statement of the organisation’s forecast turnover and profit & loss position and cash flow forecast for the current year and a bank letter outlining the current cash and credit facility position.
- f. To be in possession of or to have initiated the procedure to obtain the following certifications or equivalent qualifications (do not attach the certificates, indicate the name of the certifying body and the certificate registration data pertaining to the qualification obtained, or information necessary to verify and evaluate any equivalent qualifications):
 - i. Quality Management Systems ISO 9001:2008;
 - ii. OPTIONAL: Social Responsibility SA 8000:2008.

The admissibility of any equivalent qualification submitted will be judged by the Institute at its own unappealable discretion.

- 4.6.4 In the case of a TGC and/or consortium, the requirements listed under point (4.6.2.a) to (4.6.3.e) must be possessed by each one of the companies making up the grouping and/or consortium.
- 4.6.5 On the contrary, the verification of requirements listed under point (4.6.3.f) will be performed considering the TGC and/or consortium as a single entity. Therefore, these requirements may be possessed either by a single company or by the individual companies that make up a consortium or are members of a temporary grouping of companies.
- 4.6.6 The Institute reserves the right to perform sample checks in order to verify the accuracy of the statements submitted by tenderers.

4.7 Award criteria

- 4.7.1 Only the Offers that meet all the requirements listed in 4.6 - “Selection Criteria” shall be eligible for the next stage of the procedure, the technical evaluation and the presentation quality evaluation.
- 4.7.2 Only the Offers with a fully compiled Annex F – Compliance matrix shall be eligible for the next stage of the procedure, the technical evaluation and the presentation quality evaluation.
- 4.7.3 Offer with a fully complied Annex F - Compliance matrix where one or more requirements are declared “partially compliant” can be considered **not eligible** for the next stage of the procedure, the technical evaluation and the presentation quality evaluation.

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4.7.4 The contract will be awarded according to the principle of the “**best value for money**”, based on the evaluation that will be carried out by an evaluation committee entrusted with the task, which will attribute a score to each bid, out of a maximum score of 100 points, according to the following parameters:

MAXIMUM SCORE	
Technical evaluation	65/100
Economic evaluation	35/100

The total score assigned to the offer is made up of the sum of the technical evaluation, and economic offer evaluation.

The tenderer whose offer obtains the highest final score is the tenderer who will be awarded the contract. Wherever the evaluation parameter is solely an objective parameter, the score will be calculated in proportion to the degree to which the bid equals the minimum level required.

In cases where the parameter can also be affected by a comparative analysis in relation to the other offers submitted, then the Committee will assign a score at its own discretion, providing motivations for its evaluation.

4.7.5 ASSIGNING POINTS FOR TECHNICAL ASPECTS OF THE OFFER.

To evaluate the technical and qualitative aspects of the offer points will be assigned as shown in Table 4-1 below up to a maximum of 65.

For each item in Table 4-1, the evaluation committee will assign at its own discretion a score from 0 to the maximum indicated in the table, on the basis of the degree of compliance with the requirements of the STS.

	EVALUATION CRITERIA	MAXIMUM score
A	Technical Evaluation	55
a1	Required application functionalities	7
a2	Data model	7
a3	Preservation workflow	7
a4	The Submission Process	7
a5	The Archiving process	7
a6	The Access process	7
a7	Project guidelines	3
a8	Environment & design constraints	3
a9	Application administration	2

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a10	Maintenance, support	3
a11	Transcripts, Reporting, Statistics	2
B	Quality evaluation of the technical documentation	10
b1	Completeness of the technical documentation	3
b2	Level of details and understandability of the technical documentation	7

Table 4-1

The score awarded for the technical evaluation will be the sum of the points awarded in the separate sections: $A+B$ where $A= a1 + a2 + \dots + a11$. $B = b1 + b2$

The minimum threshold for technical admissibility is $A \geq 35/60$. $B \geq 5$. Tenderers who do not reach both thresholds will not be put through to the next stage: in other words, their economic offer will not be evaluated.

Once the tender is awarded, the technical Offer of the winning bid becomes an integral part of the Contract together with these STS.

4.7.6 AWARDING OF POINTS IN RELATION TO PRICE OFFERED

To evaluate the technical and qualitative aspects of the offer points will be assigned as shown in Table 4-2 below up to a maximum of 35.

The scores, calculated according to the formulae shown below, will then be rounded off to the second decimal figure, if necessary.

In general, the procedure adopted shall consist in calculating the proportional ratio between the best offer received and that proposed by every other tenderer; on this basis, each item shall be awarded some of the 35 available points, established according to the importance that the Contracting Authority attributes to the nature of each service or product supply.

	EVALUATION CRITERIA	MAXIMUM score
C	Economic evaluation	35

Table 4-2

The formula that shall be applied is the following:

$$C = 35 \times \frac{\text{Lower overall price}}{\dots\dots\dots}$$

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Offered overall price

4.7.7 The final score awarded to each tenderer will be the sum of the points awarded in the separate sections (A + B + C), as described in this Article.

4.8 Indicative timeline of the tender procedure

Description	Date
Launch of the tender procedure	4 Dec 2015
Deadline submission queries and clarification requests	22 Dec 2015, 3 pm (Italian time)
Deadline submission of Offers	26 Jan 2016, 3 pm (Italian time)
Results communicated	between 22 and 26 Feb 2016
Contract signed	March 2016

4.9 Obligations after being awarded the tender

4.9.1 In order for the definitive award of the tender to enter into force, the successful Company must submit the following, within the date established by the Contracting Authority:

- g. a performance bond equal to 10% of the mean annual contract value based on its own Economic Offer; the performance bond shall be issued as a guarantee of the Company fully performing all obligations relating to the contract, and deriving from it, and shall be raised according to the method described in Article I.4.2 of the Draft Contract (Annex H);
- h. certified true copies of all certificates presented as documentation for the tender procedure.

4.9.2 If the Company that is awarded the tender does not comply in a timely fashion with the above obligations, or does not submit all the documentation requested, or does not provide evidence of the prerequisites it declared on its honour to be in possession of, or if such evidence is not considered in conformity with the declarations included in the tender documentation, the Contracting Authority reserves the right to withdraw its award, and to award the tender instead to the company having achieved the next highest score, or to launch a new tender procedure, holding the

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defaulting Company liable for any increase in cost the Contracting Authority may incur as a consequence. Under these circumstances, the Contracting Authority shall take possession of the defaulting Company's bid bond and shall also apply any further penalty envisaged by the existing legislation. If, on the other hand, the above-listed verification activities are all performed in a satisfactory manner, the Company will effectively be awarded the tender and will be formally invited to sign the contract.

5 FINAL PROVISIONS

5.1 General information

- 5.1.1 All aspects of the tender procedure shall be performed in compliance with the Institute's internal regulations, and especially in accordance with High Council's Decision No.5/2014 amending Title V of the EUI's Financial Rules regarding Public Procurement, and with the President's Decision No.44/2014, both of which are available on the EUI's website: <http://www.eui.eu/About/Tenders/Index.aspx>.
- 5.1.2 Participation in this tender procedure implies full acceptance of the above-mentioned regulations.
- 5.1.3 The rules governing the future relationship between the Contracting Authority and the Company that is awarded the tender, including payment terms, processing of personal data, dispute settlement methods, both in the tender procedure and in the implementation and performance of the contract, are all contained in the Draft Contract in Annex H.

5.2 Breaches, non-compliance and penalties

- 5.2.1 Except for cases in which the law specifies different penalties, the Contracting Authority shall uphold the terms and conditions of these Tender Specifications by applying the penalties envisaged in this Article.
- 5.2.2 The Contracting Authority shall submit its complaints according to the procedure described in Article I.10 of Annex H – Draft Contract.
- 5.2.3 The entity of the penalty shall be established in relation to the severity of the breach.
- 5.2.4 The Contracting Authority reserves the right to apply the penalties listed below. The following list of breaches shall not be considered an exhaustive list of possible instances of non-compliance.

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- loss of the result of work with serious impact on schedules or risk of defaulting on safety and security of confidential data;
- for each case of failure to observe strict confidentiality rules regarding facts and circumstances which the Contractor's staff may have become acquainted with in the performance of their duties.

5.2.5 Should more than three penalties be applied during one semester, the Contracting Authority reserves the right to terminate the contract, enforcing and taking possession of the Contractor's performance bond. In such an event, the Institute is entitled to enter into an agreement with another supplier, beginning with the other Tenderers in this procedure, following the classification assigned in the tender award itself; the Contracting Authority also reserves the right to undertake any form of legal action envisaged by the law.

5.3 Person responsible for the contract

5.3.1 The Contracting Authority appoints the Director of the Historical Archives of the European Union as Person responsible for this tender procedure and contract.

5.3.2 The Person responsible shall be in charge of all exchanges and communications with the Company that is awarded the contract, on all issues relating to the performance of the services in question, and shall be responsible for ensuring that contractual obligations are observed, enacting coercive provisions and applying penalties whenever necessary.

5.4 Reference person for the contract

5.4.1 In order to ensure that the contract is performed satisfactorily and to guarantee a correct contractual relationship with the Company that is awarded the contract, the Electronic Archives Specialist of the HAEU shall serve as Reference person for this contract. Among other tasks, the Reference person shall:

- a. act as contact person for all operational exchanges with the Contractor;
- b. follow up and act on requests for interventions in cases when it becomes necessary to introduce changes and/or new provisions, during the implementation of the contract;
- c. oversee the correct performance of the service and verify the results;
- d. where necessary, and on the basis of serious and proven motives, demand that a member of the Contractor's staff be removed from the premises and replaced, providing justification for the request;

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- e. propose to the Director of the HAEU the application of penalties and, if necessary, the termination of the contract;
- f. manage and check all invoices issued by the Contractor.

5.4.2 Final provisions and annexes

These Special Tender Specifications consist of 5 Articles, covering 53 pages, plus 7 Annexes (Annexes A,B,C,D,E,F,H), each and every one of them being an integral part of these Special Tender Specifications; by signing these STS, the Company is also formally expressing its approval and acceptance of the Annexes as well.

Annexes:

- A. Checklist
- B. "Request to Participate in the Tender" Form
- C. "Declaration on Honour" Form
- D. "Summary of Technical Offer" Form
- E. "Economic Offer" Form
- F. "Compliance matrix"
- H. Draft Contract

Signature of Legal Representative

Company's stamp

Signed in acceptance by the Legal Representative

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