



**European
University
Institute**

**INFORMATION
AND
COMMUNICATION
TECHNOLOGY
SERVICE**

Technical Specifications, Selection and Award Criteria - Lot 1

**Technical Specifications for consulting services in the field of
Identity and Access Management
with the European University Institute**

OP/EUI/ICTS/2020/03/LOT 1

YEAR 2020

Summary

CHAPTER I – DESCRIPTION OF REQUIRED SERVICES	3
1. Description of Services	3
CHAPTER II – SPECIFIC SELECTION CRITERIA	4
2. Skills and qualifications: requirements for the service personnel of consultancy service	4
3. Skills and qualifications: suppliers’ requirements of consultancy service	5
4. Technical support services	6
CHAPTER III – SPECIFIC AWARD CRITERIA.....	7
5. Assigning Points for Technical and Qualitative aspects of the Service	7
6. Assigning Points for Economic Aspects of the Service	10

CHAPTER I – DESCRIPTION OF REQUIRED SERVICES

1. Description of Services

The object of this tender procedure is to identify, within the Framework Contract Agreement, a company for the provisioning of consultancy and technical support services for the development, testing and implementation of advanced technical solutions for the following IAM technologies:

- One Identity - family products
- One Identity – Identity manager
- One Identity - Privileged Access Suite for UNIX

The technical support requires the knowledge of the following IT technologies:

- Expert knowledge of Microsoft Active Directory
- Expert knowledge of integration with:
 - Microsoft Active Directory
 - Microsoft AD Azure
 - Oracle database
 - SQL database

Due to the international nature of the EUI, every written communication and most of the meetings that will require the involvement of the appointed experts, will be held in English. For this reason, it is required for the technical personnel to have a sound knowledge of the English language, both spoken and written.

1.1. Consultancy services

The consultancy services will be provided on premise or from remote by various technical profiles. The activities will take place in the office made available by Data Security Officer (DSO), currently located at Villa Il Poggiolo, Piazza Edison 11, during office hours (9 am to 6 pm) under the supervision of Data Security Officer.

As to simplify the operations scheduling and planning, when possible the activities will be planned well in advance (normally two weeks before).

Outside office hours activities might be requested when necessary. No additional compensation is foreseen for consultancy services provided “Off-hours” but a conversion of worked hours spent in activities performed during “off-hours” hours and regular office hours will be performed. The Company is therefore requested to specify a conversion rate of “off-hours” hours into regular office hours (e.g. “3 hours of activities performed during “off-hours” is equivalent to 5 hours of activities performed between 9 am and 6 pm”).

1.2. Technical support services

A technical support will perform daily checks and resolve technical issues according to a specified SLA. The service will be available from Monday to Friday during working time 9 am to 6 pm according to EUI opening calendar weeks. See Annex II-F_Vacation-Days-2020.

CHAPTER II – SPECIFIC SELECTION CRITERIA

2. Skills and qualifications: requirements for the service personnel of consultancy service

Essential requirements:

The following minimum requirements will be requested, with no exception, to the personnel involved in the consultancy activities and execution:

- Good knowledge of the English language (written and spoken)
- Deep knowledge of **One Identity – Identity manager** from version 8.x and later
- For IAM Architect, at least 8 years of demonstrated experience in the role supporting One Identity family products.
- For IAM consultant, at least 5 years of demonstrated experience in the role supporting One Identity family products

Advantageous requirements: the following qualifications and certifications are considered optional but will be considered in the evaluation process:

- Identity Manager Implementation Certification
- Knowledge of Identity manager integration with Oracle and SQL
- Knowledge of Microsoft Windows server and Active Directory
- English language certifications or qualifications

The achievement of desired organization objectives requires the following profiles:

Identity and Access Management - Architect (equivalent to a Senior Consultant)

An IAM Architect has a specific expertise in the Identity governance and privileged access applications and the relevant business processes. He/she holds relevant professional certifications and a Computing or Information technology degree or equivalent professional expertise. The consulting services will be offered by a team of experts, the IAM Architects have some of the following competencies in the technical and business analysis fields:

- Deep expert knowledge of Identity manager product to manage the solution architecture in the domain of identity and access management and related middleware as well as coordinating estimations and delivery of multiple workflows, work packages and identity life cycles.
- Design and develop automated provisioning, de-provisioning and reconciliation of IT resources
- Deep knowledge of Microsoft Active Directory and Microsoft AD Azure
- Good knowledge of Office 365 core services, Exchange Online, Oracle and SQL
- Expert knowledge of Microsoft Active Directory
- Expert knowledge of Linux distributions and system management
- Deep expert knowledge of Privileged Access Suite for Unix to install, configure deploy and support the solution providing privileged access to Linux server.

Identity and Access Management - Consultant

An IAM Consultant has practical expertise in the product and various types of implementations. He/she holds professional certifications and a level of education to provide effective contribution. The consulting services will be offered by a team of experts; among others, the IAM Consultants have some of the following competencies and hands-on in the technical fields:

- Good knowledge of Identity manager product to customise web interfaces and to produce custom made reports.
- Expert knowledge to support account certification, entitlement, the resolution of identity conflicts at provisioning and to fix issues.
- Expert knowledge to devise approval workflows to grant access to applications and resources
- Expert knowledge of role-based resolution of approvers
- Expert knowledge of Privileged Access Suite for Unix to provide support in bug fixing and integrating new Linux servers.

3. Skills and qualifications: suppliers' requirements of consultancy service

Essential requirements

The following minimum requirements will be requested, with no exception, to the company providing the service activities and execution:

- ISO 9001 Certification
- A team composed by both IAM Architects and IAM Consultants

Technical and professional capacity criteria and evidence

Supplier must comply with the following selection criteria in order to prove that they have the necessary technical and professional capacity to perform the contract.

The Supplier must prove experience in the field of Identity Access Management:

- Identity governance, privileged access management and business development
- Minimum level capacity. The Supplier should demonstrate at minimum five relevant references:
 - Identity Access Management projects executed in the last 3 years (see point 3 of the STS)
 - Project's total contract value at least of 50,000 (fifty thousand euro) for the same technologies
 - Project's client: organisation/institution/company with over 10 staff members in total
 - Provide evidence mentioning Client name, project period, indicative amount and reference person. (We reserve the right to verify the information before finalising the tender award)

Advantageous requirements: the following qualifications and certifications are considered optional but they will be considered in the evaluation process:

- Direct support channel with One Identity with the possibility of escalating to the highest level in the case of necessity. Companies that have a direct support channel with One Identity with the possibility of opening "Incidents" to the Support Center will get an excellent evaluation (ref# Table 2 - Quality coefficients).
- Completed the One Identity Manager Implementation Certification Process owned by the company

4. Technical support services

The support is provided by an **IT Support Specialist** skilled on **One Identity products family** (the IT support specialist has a consultant profile). Service Level Agreement – Terms and conditions:

The service is provided from Monday to Friday, working time 9am to 6pm (EUI opening calendar weeks)

The service requires daily checks on IAM systems and to solve issues related to the IAM products:

- Daily checks should be done ensuring that IAM infrastructure is running
- Take in charge the request of intervention to solve problems: blocking issues should be acknowledged in 4 hours and non-blocking issues is acknowledged on the Next business day.

The service will be subscribed on an annual base without automatic renewal; it may be subscribed, and it starts of the second year of the project (not before January 2021).

CHAPTER III – SPECIFIC AWARD CRITERIA

5. Assigning Points for Technical and Qualitative aspects of the Service

In evaluating the technical and qualitative aspects of the offered service, the Evaluation Committee, at its own discretion, shall use the scores shown in **Table 1**, the maximum sum of which is equal to 70.

According to the level of adequacy and conformity requested in this STS, the Evaluation Committee shall assign a scoring between **0** and **70**.

Each technician proposed by the Company will be evaluated according to the scores defined in **Table 1** (from **A1** to **A7**) and has to obtain always at least the minimum score for each requirement, on pain of rejection. The total score will consist in the average of the points obtained by each evaluated technician.

Companies that will offer more than one technician to be evaluated might obtain a higher score in section **A8** in case all the proposed technicians obtain a score higher than **39** points in the “qualifications of support personnel” section of Table 1. Companies not obtaining the minimum score in **A8** section will be rejected from this tender.

Table 1 – Technical and Qualitative aspects scoring			
Description		Min. Score	MAX. Score
Qualifications of support personnel			
A1	Knowledge of One Identity product family	5	10
A2	Knowledge of Privileged Access Suite for Unix	5	10
A3	Knowledge of integration with Microsoft Active Directory and AD Azure	3	5
A4	Knowledge of integration with database (Oracle/SQL)	3	5
A5	Knowledge of IAM business processes	4	8
A6	Technical certifications held	3	8
A7	Knowledge of the English language	2	4
Qualifications of the Company			
A8	<ul style="list-style-type: none"> Technical and professional capacity criteria and evidence Direct support channel One Identity Manager Implementation Certification Process 	5	10
Technical support services			
A9	Organisation of the service	3	5
A10	SLA evaluation	3	5

Maximum score for the parameter **A** is **70**:

$$A = (A1+A2+A3+A4+A5+A6+A7+A8+A9+A10) = 70$$

As far as **Table 1** criteria are concerned, coefficients shall be assigned according to the following **Table 2**

Table 2 - Quality coefficients		
Evaluation	Description	Coefficient
Excellent	<p>Requirements, knowledge, certifications and previous experience are of a very high level, providing added value with respect to the Contracting Authority's expectations.</p> <p>As a guidance, the following evaluation criteria will be applied:</p> <p>Qualifications of support personnel (Table 1 A1-A7)</p> <p>Essential requirements: Exceeding expectations presenting team members with more years of demonstrated experience in the role than required.</p> <p>Advantageous requirements: Presenting team members that have one or more of the qualifications and certifications indicated.</p> <p>Qualifications of the Company (A8)</p> <p>Essential requirements: Exceed the expectations showing the redundancy of team's members (more than one architect and consultant with key competences, experience and seniority) and the team composition covering all required competencies (also indicating the number of architects and consultants composing the team).</p> <p>Advantageous requirements</p> <p>Technical and professional capacity criteria and evidence: Exceed the minimum requirements such as the number of projects run in the last three years, or bigger project's size.</p> <p>Direct support channel: Companies that have a direct support channel with One Identity with the possibility of opening "Incidents" to the Support Center will get an excellent evaluation.</p> <p>Company's certification: Completed <u>One Identity Manager Implementation Certification Process</u> owned by the company</p> <p>Technical support services (A9-A10)</p> <p>Organisation of the service: Exceed the minimum requirements showing the company's experience in offering the same type of service to other clients and the redundancy of IT Support Specialists' team.</p> <p>SLA evaluation: Exceeding the minimum requirements (reduced time to take in charge the request of intervention).</p>	1,00
Good	<p>Requirements, knowledge, certifications and previous experience exceed expectations</p> <p>As a guidance, the following evaluation criteria will be applied:</p> <p>Qualifications of support personnel (A1-A7)</p> <p>Essential requirements: Meet the expectation presenting team members with requested years of demonstrated experience in the role.</p> <p>Advantageous requirements: Presenting at least half of the team members that are holding one or more of the qualifications and/or certifications indicated.</p> <p>Qualifications of the Company (A8)</p>	0,75

	<p>Essential requirements: Exceed the expectation showing the redundancy of team's members (more than one architect\consultant with key competences, experience and seniority).</p> <p>Advantageous requirements</p> <p>Technical and professional capacity criteria and evidence: Exceed the minimum requirements such as the number of projects run in the last three years or less projects of bigger size.</p> <p>Direct support channel: <u>Companies that are in the process to have a direct support channel with One Identity.</u></p> <p>Company's certification: Completed <u>One Identity Manager Implementation Certification Process</u> owned by the company</p> <p>Technical support services (A9-A10)</p> <p>Organisation of the service: Exceed the minimum requirements showing company's experience in offering the same type of service to other clients or showing the redundancy of IT Support Specialists' team.</p> <p>SLA evaluation: Exceed the minimum requirements offering better SLA conditions.</p>	
Satisfactory	<p>Requirements, knowledge, certifications and previous experience are in line with what was foreseen in the STS.</p> <p>As a guidance, the following evaluation criteria will be applied:</p> <p>Qualifications of support personnel (A1-A7)</p> <p>Essential requirements: Meet the expectation presenting team members with requested years of demonstrated experience in the role.</p> <p>Advantageous requirements: Presenting at least one of the team members that are holding one or more of the qualifications and/or certifications indicated.</p> <p>Qualifications of the Company (A8)</p> <p>Essential requirements: Meet requirements showing that the key competencies (A1-A5) are covered by members of the team presented (at least one architect and a consultant with required competences, experience and seniority).</p> <p>Advantageous requirements</p> <p>Technical and professional capacity criteria and evidence: Meet the minimum requirements</p> <p>Direct support channel: <u>Companies that are in the process to have a direct support channel with One Identity. (Given it is not a compulsory requirement)</u></p> <p>Company's certification: Completed <u>One Identity Manager Implementation Certification Process</u> owned by the company <u>(Given it is not a compulsory requirement)</u></p> <p>Technical support services (A9-A10)</p> <p>Organisation of the service: Meet the minimum requirements presenting at least two IT Support Specialists composing the team.</p> <p>SLA evaluation: Meet the SLA conditions The service is provided from Monday to Friday, working time 9am to 6pm (EUI opening calendar</p>	0,50

	<p>weeks) The service requires daily checks on IAM systems and to solve issues related to the IAM products:</p> <ul style="list-style-type: none"> • Daily checks should be done ensuring that IAM infrastructure is running • Take in charge the request of intervention to solve problems: blocking issues should be acknowledged in 4 hours and non-blocking issues is acknowledged on the Next business day. 	
Poor	<p>Requirements, knowledge, certifications and previous experience are partially unsatisfactory As a guidance, the following evaluation criteria will be applied:</p> <p>Qualifications of support personnel (A1-A7) Essential requirements: Meet only the minimum requirements presenting team members with requested years of demonstrated experience in the role. Advantageous requirements: None are met</p> <p>Qualifications of the Company (A8) Essential requirements: Meet only essential requirements showing that the key competencies (A1-A5) are covered by the members of the team presented (at least one architect and a consultant with required competences, experience and seniority). Advantageous requirements: none of the criteria below are met</p> <ul style="list-style-type: none"> - Technical and professional capacity criteria and evidence - Direct support channel - Company's certification <p>Technical support services (A9-A10) Organisation of the service: Meet only the minimum requirements presenting one IT Support Specialist. SLA evaluation: Meet the SLA conditions but the company runs the service for the first time.</p>	0,25
Unsatisfactory	<p>Requirements, knowledge, certifications and previous experience are completely inadequate The essential requirements in one of the following categories are not met:</p> <p>Qualifications of support personnel (A1-A7) Qualifications of the Company (A8) Technical support services (A9-A10)</p>	0,00

Once the tender is awarded, the successful Technical Offer becomes an integral part of the STS and of the Contract.

6. Assigning Points for Economic Aspects of the Service

In evaluating the economic aspects of the offered service, the Evaluation Committee, shall use the scores shown in **Table 3**, the maximum sum of which (**B** parameter) is equal to **30**.

$$B = (B1+B2+B3+B4+B5+B6) = 30$$

Table 3		
Description of the Service		MAX Points
B1	Identity and Access Management- Architect (Senior Consultant) per hour rate - ON SITE (Standard operation - 8 hours a day)	7
B2	Identity and Access Management- Architect (Senior Consultant) per hour rate - REMOTE	3
B3	Identity and Access Management Consultant per hour rate - ON SITE (Standard operation - 8 hours a day)	7
B4	Identity and Access Management Consultant - per hour rate - REMOTE	3
B5	Conversion Ratio between hours worked in “off-hours” (from 6 pm to 9 am) and hours worked in office hours (from 9 am to 6 pm) eg. 1 (“off-hours”) equal to 1,5 (Office Hours)	2
B6	Technical support services - REMOTE (availability from Monday to Friday 09 am to 06pm)	8

The maximum score achievable of **B1** for the price **P (7 points)** will be awarded to the Tenderer who offers the best price for the “hour of on-site” consultancy (lowest price). The other companies will be awarded different scores (rounded off to the second decimal figure, if necessary) calculated in proportion to the ratio between the best price and the price offered by each Tenderer.

The following formula will be applied:

$$B1 = 7 \times \frac{\text{Best price}}{\text{Price offered}}$$

where P = points (score) awarded to the offer.

The maximum score achievable of **B2** for the price **P (3 points)** will be awarded to the Tenderer who offers the best price for the “hour of remote consultancy” (lowest price). The other companies will be awarded different scores (rounded off to the second decimal figure, if necessary) calculated in proportion to the ratio between the best price and the price offered by each Tenderer.

The following formula will be applied:

$$B2 = 3 \times \frac{\text{Best price}}{\text{Price offered}}$$

The maximum score achievable of **B3** for the price **P (7 points)** will be awarded to the Tenderer who offers the best price for the “hour of on-site” consultancy (lowest price). The other companies will be awarded

different scores (rounded off to the second decimal figure, if necessary) calculated in proportion to the ratio between the best price and the price offered by each Tenderer.

The following formula will be applied:

$$B3 = 7 \times \frac{\text{Best price}}{\text{Price offered}}$$

where P = points (score) awarded to the offer.

The maximum score achievable of **B4** for the price **P (3 points)** will be awarded to the Tenderer who offers the best price for the “hour of remote consultancy” (lowest price). The other companies will be awarded different scores (rounded off to the second decimal figure, if necessary) calculated in proportion to the ratio between the best price and the price offered by each Tenderer.

The following formula will be applied:

$$B4 = 3 \times \frac{\text{Best price}}{\text{Price offered}}$$

As far as **B5** score is concerned, a proportion between the conversion ratio proposed by each Company and the most advantageous conversion offer received will be made, assigning 2 points according to the obtained coefficient.

$$B5 = 2 \times \frac{\text{Proposed Conversion Ratio}}{\text{Best Proposed Conversion Ratio}}$$

Example:

Company A: 1 hour worked in Off-Hours = 2 hours worked in office hours.

Proposed ratio 1:2 = 0,5

Company B: 1 hour worked in Off-Hours = 1 hour worked in office hours.

Proposed ratio 1:1 = 1

B3 Score for Company A = 2 x (0,5/1) =1

B3 Score for Company B = 2 x (1/1) = 2

The maximum score achievable of **B6** for the price **P (8 points)** will be awarded to the Tenderer who offers the best price for the “Technical support services REMOTE ” (lowest price). The other companies will be awarded different scores (rounded off to the second decimal figure, if necessary) calculated in proportion to the ratio between the best price and the price offered by each Tenderer.

The following formula will be applied:

<p>Best price</p> <p>$B6 = 8 \times \text{-----}$</p> <p>Price offered</p>

For the economic evaluation each company will be requested to fill in the economic offer form (**Annex II-E-1**).