



European
University
Institute

INFORMATION
AND
COMMUNICATION
TECHNOLOGY
SERVICE

**Open Call for Tenders for the Supply of IT Technical Support
Services to End Users of the European University Institute
SPECIAL TENDER SPECIFICATIONS**

Ref.: ***CFT-EUI-ICTS-2017-001***

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Please Note: This English language text is a translation from the original Italian, to enable foreign bidders to participate in the tender. In case of doubt, dispute or involuntary errors or omissions, only the original Italian text will be valid.

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CHAPTER I – GENERAL CONDITIONS OF THE TENDER PROCEDURE

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. It was 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.

The prestigious Historical Archives of the European Union – the official archives for historical and political documents of the institutions of the European Union – have been an integral part of the EUI since the early 1980s.

For more information, please visit the HAEU's [official website](#).

2. Presentation of the IT Support System

The ICT Service uses a complex IT system to execute the academic and administrative work of the EUI. This system comprises more than 2,500 pieces of equipment, which are used to provide services to members, to run the various premises and for administrative services.

The abovementioned equipment can be divided as follows:

- approximately 900 client workstations, Operating System: Windows 7 (the majority) or Mac OS X;
- more than 200 laptops, Operating System: Windows 7 or 10, or Mac OS X;
- local redundant mesh network with 250 switches;
- local wireless network with more than 200 access points;
- telephone network with more than 1,000 fixed and mobile phones;
- approximately 150 network printers and other devices (scanners, microfilm readers, etc.).

The more important systems (e.g. email, web, network, shared areas, etc.) have redundancy protocols or dedicated and specialised support services. Where this is not possible, on-site back-up is available for a quick reset in the event of malfunction.

The ICT Service also uses information management systems to identify, in real-time, the location and localisation of these systems, thereby simplifying the recovery process.

Having embraced the “Bring Your Own Device” (BYOD) philosophy, the ICT Service also offers its members high-end “best effort” support for the installation of campus licensed software on private/personal (non-EUI) devices such as laptops, tablets and smartphones. It also helps set up connections with the IT systems available (such as e-mail, shared network areas, network printers, etc.). This service is known as [Portable Device Support](#).

Lastly, a welcoming and induction service is offered to new members, in addition to a mentoring service, aimed at understanding the various IT needs of the Institute's members (in terms of purchasing, data protection, security, etc.) and therefore identifying the most suitable solutions in accordance with existing internal resources, regulations and practices.

A centralized [Helpdesk](#) is responsible for handling all support requests from the end user. Operators of the EUI Helpdesk telephone lines only handle IT support requests (tickets), but they can dispatch requests to other technical units or to the Real Estate & Facilities Service or other administrative units not directly related to the centralized support services of the Institute (Academic Service, Library, etc.).

Closing the circle are the T2 (Tier II) IT support units, with on-site teams dedicated to the management, maintenance and support of the server and network infrastructures, the centralised printing services, fixed and mobile phone lines, the web, databases, software applications, etc.

In light of the above, there is a need for constant support, for high-end on-site and on-field technical support in order to ensure the functionality, maintenance and recovery of the IT systems indicated above (and therefore the continuity of the service) on a daily basis and in case of malfunction, blackout and/or breakdown, all of which can occur during the normal use of the equipment. Also, "best effort" support for private devices, management of IT material, including inventory, and tutoring activities are also necessary. Moreover, the centralised Helpdesk needs to be strengthened and re-structured. This includes the creation of a knowledge base.

3. Definitions

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

"Company" shall mean the Company that is awarded the contract through the tender procedure, for the supply of the service (or services) that are the object of these STS.

"Competitor", "Candidate" and "Tenderer" shall mean any Company that submits an Offer through the tender procedure.

"Service" shall mean the object of this tender procedure.

"Service in Charge of the tender procedure" shall mean the EUI's Information and Communication Technology Service (ICT Service).

"On-site" and "Off-site" shall mean the service available *in situ* or on standby.

"Helpdesk" shall mean the Call Centre (SPOC) designed to log, track and manage requests for support from end users through the creation of a ticket by means of ticket management software, to be resolved directly (by the Service Desk) or dispatched to the relevant technical units.

4. Object of this Tender Procedure

The Institute is launching this tender procedure in order to enter into a contract with the Company that is awarded the tender. The contract shall be for the implementation and management of an "IT technical support service for the end user of the European University Institute" to be carried out by:

- A. on-site technical staff;
- B. off-site technical staff on standby;
- C. an outsourced helpdesk.

The object of the tender is, therefore:

- the management of the flow of requests for IT support (including non-IT related requests for the Helpdesk) generated by the EUI's administrative and academic units, as well as visitors, guests and external users; the overall management of document output produced by the EUI administrative and academic units located on all the premises as listed in [Article 7](#).
- IT support (high-end) to the end user under the profile, duties and contractual conditions described in these STS; and
- the administrative management resulting from the above points (*ticket management, knowledge management, asset tracking, purchase initiation, etc.*);

Tenderers shall estimate the amounts for:

- 1. a fixed-cost service with 6 (six) full-time equivalents (FTEs);**
- 2. a call centre operating off-hours, when the Institute is closed and/or on weekends;**
- 3. an all-inclusive, fixed-cost Helpdesk (Call Centre, Service Desk and SPOC), designed for 1,600 (one thousand six hundred) users, with a margin of +/- 5%.**

The *on-site* services that are the object of this procedure shall be provided on the present and future premises of the Contracting Authority (the list of current EUI premises is to be found in [Article 7](#)).

The Company shall supply the Services that are the object of this procedure at its own risk and relying on its own independent organisation and infrastructure, in full observance of the terms and conditions of these STS (Special Tender Specifications), including Annexes (see [Article 44](#)), the Invitation to Tender Letter, the Service Contract and the documentation submitted by the Company as part of its bid.

5. Information on the Contract

Type of Contract	<p>The Service Contract that will be entered into at the conclusion of this tender procedure shall be based on the Draft Contract in Annex P, supplemented by these STS and all annexes, the Invitation to Tender Letter and the Economic and Technical Offers submitted by the Company as its tender, including all the annexed documentation.</p> <p>Any comment and/or request for clarification as to the meaning and/or interpretation of the Draft Contract must be clearly formulated, explaining the motive for the query, and submitted before the deadline given in Article 37. 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.</p>
Duration	<p>The duration of the Framework Contract is established as 2 (two) years renewable up to 3 (three) times for a period of 1 (one) year each, from the date of signature by the parties, except for the terms laid out in the termination clauses (see Article II.14 in the Draft Contract in Annex P).</p>
Presumed amount of Tender	<p>The presumed amount is estimated as follows:</p> <ul style="list-style-type: none"> A. for on-site technical staff, €240,000.00 (two hundred and forty thousand/00) per annum, excluding VAT, for a total value of €1,200,000.00 (one million two hundred thousand/00) for the 5 (five) years of overall duration of the contract; B. for off-site technical staff, €5,000.00 (five thousand/00) per annum, excluding VAT, for a total value of €25,000.00 (twenty-five thousand/00) for the 5 (five) years of overall duration of the contract; C. for the Helpdesk, €45,000.00 (forty-five thousand/00) per annum, excluding VAT, for a total value of €225,000.00 (two hundred and twenty-five thousand/00) for the 5 (five) years of overall duration of the contract; <p>The above amounts were calculated on the basis of the costs incurred by the Contracting Authority for the same services offered in the five-year period 2012-2016 (Part A) and in the period 2014-2016 (Part B) and/or market analyses (Part C).</p> <p>The presumed annual sum of the three parts (A + B + C) is €290,000 (two hundred and ninety thousand/00). This amount consists of fixed amounts (A + C) and floating amounts (B). The presumed annual fixed amount is €285,000 (two hundred and eighty-five thousand/00) and the presumed annual floating amount for the “standby service” is approximately €5,000 (five thousand/00).</p> <p>Considering the above, the total presumed amount for the five-year contract is equal to €1,450,000.00 (one million four hundred and fifty thousand/00).</p> <p>The above estimates shall be taken into consideration in order to establish the total presumed amount of the tender, since it has been calculated based on variables whose future developments cannot be accurately predicted. In particular, the amount indicated for off-site technical staff shall not be binding for the Institute. It shall not, therefore, be taken as a guarantee of the future contract’s volume, nor shall it in any way be binding on the Institute.</p> <p>The amount of the tender includes all those services envisaged in these STS and in the documentation submitted by the Company in its bid, including any improvement the Company’s Offer may have proposed, as well as any other direct or indirect cost that may be incurred in the satisfactory provision of said services.</p>

CHAPTER II – DESCRIPTION OF SERVICES REQUIRED

Part I – General Information

6. Description of Service and Minimum Requirements

6.1. Description of Service

The activities covered by this tender procedure shall guarantee the maximum efficiency of the high-end technical support service and the quality of the centralised Helpdesk of the European University Institute.

A **general list** of the activities constituting the various components of the Call for Tenders is provided below. See **Part II** of these STS for details regarding the services and the execution thereof.

6.1.1 On-site Technical Support

The On-site Technical Support Service shall be the main service, offered on a daily and continuous basis by the technical staff of the Company on the main premises of the EUI, as listed in [Article 15.2](#). Upon request, the staff of the Company shall travel to the various buildings of the EUI (see [Article 7](#)) with their **own means of transport, suitable for the delivery of small loads**.

The staff of the Company shall deal with both the end user and the ICT Service of the EUI:

- Helpdesk operators (who usually take calls, gather information, manage and dispatch small requests);
- T2 technical staff;
- technical units and/or coordinating units outside of the ICT Service;
- ICT User Support Technical Supervisor;
- ICT User Support Coordinator;

The technical staff shall report to the ICT User Support Coordinator and shall be coordinated by the ICT User Support Technical Supervisor.

The staff shall maintain the equipment provided to the end user (desktops, laptops, tablets, telephones and mobile phones) and diagnose and troubleshoot problems related to access and usability, as well as all ICT services (email, shared network areas, etc.), including any problems with private/personal equipment.

The technical staff shall also install hardware and software, coordinate with external support services (of product licensing companies, suppliers, etc.), provide IT consultancy services and perform administrative tasks of a technical nature (update inventory via asset management software, fill in the necessary forms to move and/or send in IT equipment, etc.).

Where necessary, the technical staff shall refer to the other academic and administrative units of the EUI or to external suppliers to guarantee the successful outcome of the above activities.

The activities of management, maintenance, installation, support and consultancy shall be performed by all members of the technical support team (their roles shall be interchangeable).

The team will be run by the Responsible Officer (as in [Article 22.3](#)) and supervised by a Technical Supervisor (optional, as in [Article 22.4](#)), both of whom will be part of the Company. The Responsible Officer shall report periodically to the ICT Service's contact person in order to modify

or improve the Service provided. The Technical Supervisor, where such a function is provided for, shall report directly to the Technical Supervisor of the EUI in order to resolve specific technical problems.

The specific characteristics of the On-site Technical Support Service shall be provided in detail in [Article 15](#).

6.1.2 Off-site Technical Support

The Off-site Technical Support Service shall be provided by one (or more) members of the On-site Technical Support Team off-hours, on days on which the EUI is closed and/or on weekends. Based on the type of problem or end user, the technician shall provide assistance on-site or remotely.

With the exception of the working hours, the areas of expertise of the members of the Off-site Technical Support Team are similar to those of the On-site Technical Support Team.

The specific characteristics of the Off-site Technical Support Service, including the conditions regarding availability, shall be provided in detail in [Article 16](#).

6.1.3 Helpdesk Service

In order to streamline the activities of logging, managing and dispatching requests for support, and to maximise the advantages by creating economies of scale, the existing Helpdesk shall be outsourced.

The Helpdesk shall use the ticket management software already used by the EUI in order to monitor users' requests for support; it shall open a ticket and follow its lifecycle until it is closed; it shall gather information from the user to facilitate the identification and resolution of the problem; it shall resolve the problem (if possible) or dispatch it to the relevant technical unit; it shall update the knowledge base so that other technicians providing technical support can use solutions that have already been identified; it shall guarantee the quality of the service, by monitoring the service levels or tiers (**Annex L**).

The specific characteristics of the Helpdesk Service shall be provided in detail in [Article 17](#).

6.2. Minimum Requirements for the Service

Given the nature and importance of the Service for the Institute:

- a. the Company must have an operating centre located such as to be able to intervene at the various Institute sites as per [Article 7](#) and within the time limits laid down in **Table 2** of [Article 15.5](#), taking the main building in Via dei Roccettini as the reference point for arrival. Alternatively, the Company must be prepared to establish such an office within **30 (thirty)** days from announcement of the results of the tender, in case of being awarded the contract. To this end, "operating centre" refers to the office where all the technical staff involved will be located, and hence where the off-site Helpdesk Service and the off-site support service will be carried out, and from which replacement staff will set out in case of last minute substitutions for illness, impediments, etc.;
- b. the technical staff shall be **ITIL certified** (min. Foundation Level). If this is not the case, the Company shall obtain said certification within **12 (twelve) months** of the contract award notice;
- c. the technical staff shall be **directly employed** by the Tenderer, i.e. not sub-contracted, as in [Article 21](#);

- d. the on-site or off-site technician who will respond to a call for assistance by the EUI shall have his own means of transport so as to access quickly the premises of the Contracting Authority and to transport the materials and equipment necessary for the completion of the assigned tasks;
- e. as the technical staff will be travelling from one building to another by car, they will need to have a valid driving licence (**Category B**), as provided for by [Article 23](#);
- f. the on-site or off-site technician who will respond to a call for assistance by the EUI shall have all the necessary equipment, including a laptop, tablet and mobile phone, to do his job on the move, as provided for by [Article 15.4](#) and [Article 16.4](#);
- g. as all oral and written communication shall be in both Italian and English, the staff directly involved in the support service shall have an excellent working knowledge of both languages, as provided for by [Article 23](#).

7. Premises where the Service shall be provided

The EUI campus includes about twenty buildings located on the hillside on both sides of the boundary between the municipalities of Florence and Fiesole. The **main building** is the **Badia Fiesolana**, in the village of San Domenico in the municipality of Fiesole. The other buildings are located at Le Cure (Piazza Edison), on Via Boccaccio, Via Bolognese and Via Faentina in the municipality of Florence, and on Via Faentina in the municipality of Fiesole (Pian di Mugnone) and in the village of San Domenico, in the municipality of Fiesole, as described below:

- **The Badia Complex**, including **Badia Fiesolana – Villa Sanfelice – Villa Paola**, Via dei Roccettini, 9 & 5 - 50014 San Domenico di Fiesole (FI)
- **Villa Pagliaiuola**, Via delle Palazzine, 17/19 - 50014 San Domenico di Fiesole (FI) – NO LONGER IN USE
- **Villa Malafrasca**, Via Boccaccio, 151 - 50133 Firenze (FI)
- **Convento di San Domenico**, Via delle Fontanelle, 19 - 50014 San Domenico di Fiesole (FI)
- **Villa la Fonte**, Via delle Fontanelle, 10 - 50014 San Domenico di Fiesole (FI)
- **The Schifanoia Complex**, including **Villa Schifanoia, La Cappella, Il Casale, Il Villino** and **Villa Raimondi**, Via Boccaccio, 115/121 & 111 - 50133 Firenze (FI)
- **Villa il Poggiolo**, Piazza Edison, 11 - 50133 Firenze (FI)
- **The Villa Salviati Complex: Manica and Castello (EUI) - Ipogeo (Historical Archives of European Union)**, Via Bolognese, 156 – 50133 Firenze (FI)
- **Ponte alla Badia Flats**, Via Faentina 386 - 50133 Firenze (FI)
- **Pian di Mugnone Flats**, Via Faentina 94/B - 50014 Pian di Mugnone di Fiesole (FI)

A map of all the buildings making up the EUI campus can be found at:

[EUI Campus \(Google Maps\)](#)

The Service shall be provided on the above premises of the Institute, **as well as in any future buildings that may be added to the premises during the lifetime of the contract.**

In this regard, as there are currently plans for the acquisition of one or more premises before the contract expires, with the possible reallocation and/or creation of new administrative and academic units, the

location and number of the premises may change during the lifetime of the contract. In this case, the proposed Service shall have to be flexible enough to guarantee the same level of quality.

8. Academic and Administrative Units and User Base

At present, the EUI has the following Administrative and Academic Units, scattered across the premises indicated in [Article 7](#):

- Office of the President
- Office of the Secretary General
- Academic Service, which includes the Dean of Graduate Studies, the Counselling & Wellbeing Service and the Language Centre
- Communications Service
- Accounting Unit
- Internal Audit Unit
- Budget & Financial Service
- ICT Service
- Real Estate & Facilities Service
- Human Resources Service
- Historical Archives of the European Union
- Library
- Department of Economics
- Department of Law, which includes the Academy of European Law
- Department of Political and Social Sciences
- Department of History and Civilisation
- Max Weber Programme
- Robert Schuman Centre for Advanced Studies

The EUI has approximately 3,000 registered and supported members, of which approximately 1,000 are actively present in the Institute. Of these, about 500 are Researchers (PhDs), who use public computer rooms for the most part; the remainder includes administrative staff, teaching staff, fellows and accredited visitors, all of whom have or share offices. Of these, preferential users (teaching staff and top management) amount to just under 100 users. The remaining 2,000 are alumni, external associates (both academic and administrative), partners and retirees (see **Annex H**).

Technical support shall also be provided to prospective members, i.e. future and potential members of the EUI, with or without a computer account (e.g. new staff that is about to be hired or that has just been hired, but has not started working yet, candidates, etc.). It is impossible to know how many of them there are, but they do need support, albeit limited (information, access to certain databases, such as housing, and application forms, etc.).

9. IT Infrastructure

For Tenderers to elaborate their Offers, the following information on the IT infrastructure of the EUI has been provided:

9.1. Clients

Clients are divided as follows:

- 900 Wintel desktop computers
- 50 iMacs
- 200 WinTel laptops
- 50 MacBooks
- 100 iPads
- 150 iPhones and Windows Phones
- 1000 telephones, mainly VoIP (Cisco and Aastra)

The Operating Systems used are (in order of prevalence):

- Microsoft Windows 7 and later versions
- Citrix client (ICA)
- Apple Mac OS X El Capitan and later versions
- Windows Phone 8 and later versions
- Apple iOS 8 and later versions
- Android 6 and later versions
- Linux Ubuntu

9.2. Servers

The servers used by the EUI are:

- VMWare VSphere v6 Virtual Infrastructure
- Microsoft Windows 2008 R2 Server SP1
- Microsoft Windows 2012 R2 Server
- Citrix metaframe presentation Server
- Linux – Red Hat Enterprise v5/6/7
- Microsoft Systems Management Server (SCCM 2012)

9.3. Directory Services and File Sharing

- MS Active Directory. Version 2008 R2
- Windows Azure Active Directory (cloud directory services)
- File sharing systems using CIFS and NFS protocols

9.4. Network

Network protocol: TCP/IP

Each of the four main buildings (the Badia Complex, the Villa Salviati Complex, Convento di San Domenico and Villa il Poggiolo) is equipped with its own router, with VLAN segregation, dedicated exclusively to specific services and clients, including the Print Service, which has a different, dedicated network in each of the four buildings cited above.

The EUI uses a local area network (LAN) with a star topology. The Badia Complex is the central hub.

A fibre connection, with a speed of 1Gbps or faster, is used to connect the other buildings of the EUI to the central hub in the machine room of the Badia Complex.

9.5. Remote Access

VPN Ipsec connection through Cisco.

9.6. Telephone Network

The EUI uses an Aastra MD-110 TSW based private telephone network (PBX), with call park, and 80% analogue, digital and (a majority of) VoIP telephones. The remaining 20% consists of Cisco VoIP phones managed by a Cisco Unified Communication Manager (UCM).

9.7. Print Service

Printing services (including page-counting) operate on a network or mobile infrastructure available to all members and guests of the Institute. The service has been outsourced to Ricoh, which uses its own machinery and technical support staff. The ICT User Support Office guarantees client integration with the printing network. The contract currently in force expires in August 2021.

9.8. Email

The email service is outsourced and operates on MS Exchange 365. Integration with the Active Directory is guaranteed by the Cloud MS Azure platform. The corporate client is MS Outlook. The number of electronic mailboxes amounts to about **4,000 (four thousand)**, of which 90% are for personal use. The remaining mailboxes are used for “services” and are shared.

9.9. Software

The EUI uses a broad selection of licensed software, of unlimited, limited, concurrent or single use, for both users and devices.

The most common software is included below by way of example and in order of importance:

- MS Office 2010 and 2016, available on the Institute’s computers, limited primarily to:
 - Access
 - Excel
 - Outlook
 - PowerPoint
 - Word
- MS Office 365 Education, available to all members of the Institute
- MS OneDrive and MS OneDrive for Business
- MS Skype and MS Skype for Business
- various types of “research” software, including:
 - ArcGIS
 - CITAVI
 - EndNote
 - Eviews
 - Gauss
 - Matlab

- MikTex
- nVivo
- OxMetrics
- R
- Scientific WorkPlace
- Stata
- WinEdt
- WinRATS
- Zotero
- zTree
- Adobe software products, both with Creative Cloud and permanent licences, including:
 - Adobe Professional
 - Illustrator
 - InDesign
 - PhotoShop
 - Premiere
- PDF Creator + PDF Architect Suite
- 7-Zip
- CD Burner XP
- MS Project
- MS Visio
- AutoCAD (Autodesk Building Design Suite)
- Remote Desktop Connection (MS Terminal Server Connection)
- TeamViewer
- WMWare Fusion

9.10. Applications

The applications used include, but are in no way limited to:

- Alfresco (content repository)
- Citrix
- Contensis (content management system)
- Crystal Reports (for reporting)
- CUCI and CUCILync (Cisco UC Integration, Cisco UC Integration for MS Lync)
- INAZ (time management)
- Osiris (student record management)
- Qualtrics
- Question Pro
- SAP
- TurnItIn (academic plagiarism checker technology)
- Xperience (IT service management)
- Various applications developed internally (event management, eshop, etc.)

10. Essential Information on the EUI's IT support system

The EUI's IT support system uses a classic level one front user and a specialised second tier.

In view of the nature and size of the Institute, as well as the number and geographic location of the various buildings, on-site technical support (ICT User Support Office) and the EUI Helpdesk are both level one contact points, i.e. horizontal entry points, meaning the end user can refer to either one for support. At present, the ICT User Support Office can be contacted by email or visited face-to-face, while the EUI Helpdesk can only be reached via telephone or the [self-service](#) web portal.

The current setup of the various components and/or roles of the IT support system of the Client is described below.

10.1. EUI Helpdesk

The EUI Helpdesk is currently an in-house service. It will be outsourced, which is the object of this tender procedure.

The EUI Helpdesk handles both ICT and Facilities-related tickets (plumbing, electricity, masonry, portage, general and specific maintenance, etc.). The number of operators currently working the desk is **2 (two) full-time equivalents (FTEs)**, one per service (1 x ICT Service, 1 x REFS). They are **located in different buildings**.

The ICT operator handles the call centre, but both have access to the ITSM (IT Service Management) portal, a self-service system in which an end user can open a ticket.

In the case of calls, the operator gathers information about the nature of the problem and then opens an ICT or Facilities Ticket.

In the case of ICT tickets, depending on the type, nature, incidence, severity, etc., the operator resolves the problem "remotely" or dispatches it to the on-site technical support service or to tier 2.

In the case of Facilities-related issues, the operator opens a ticket and assigns it to the REFS queue. Thereafter, the ticket will be managed by a REFS operator, who will either resolve the problem or dispatch it to a specific technical unit.

At present, off-topic tickets, which are related to neither the ICT Service nor the REFS Service, are being rejected. End users are given internal contact details they can use (e.g. the Library Secretary's contact details for a request related to the Library).

The end-user tickets generated via the portal can already be categorised by nature (ICT and/or Facilities). They therefore populate the queue of either service.

The Helpdesk operator oversees the entire lifecycle of a ticket, ensuring that its status is continuously updated and that it is eventually closed. In this way, quality control is guaranteed.

Two Service Managers, one for each of the two services of the EUI Helpdesk (ICT and REFS), and a Project Manager oversee all the activities of the EUI Helpdesk.

10.2. ICT User Support Officer

This position is an integral part of the Service that is the object of this tender procedure.

The User Support Officer is first and foremost a technician responsible for level one IT support and in charge of the entire IT infrastructure installed in the relevant buildings (clients, network, telephone network, etc.).

Currently, the officers work in publicly-accessible offices in the various buildings of the EUI and are distributed as follows:

- the Badia Complex: **2 (two) FTEs**
- the Salviati Complex: **1 (one) FTE**
- the Schifanoia Complex: **1 (one) FTE**
- Villa La Fonte: **1 (one) FTE**

The 5 (five) technicians currently employed full-time in the service are outsourced and therefore object of [Article 12.1\(d\)](#).

The technicians are assisted by one or more trainees (from UK universities where they are studying Computer Science, for a period of one year) supervised by the ICT User Support Technical Supervisor. They report to the ICT User Support Coordinator.

Level one technicians receive tickets dispatched by the Helpdesk or they open tickets for those users who contact the service in person or via email.

Where necessary, technicians move "on field" to resolve problems that cannot be managed remotely.

Lastly, as already indicated, the level one technicians also provide assistance to users (individuals or research projects), by providing advice on the technology used by the Institute or solutions based on their research needs, all the while **respecting the standards, procedures, regulations and practices in force**.

10.3. Portable Support Service

This is an integral part of the Service that is the object of this tender procedure.

The Portable Support Service is a specialised "best effort" support service for private devices owned by members of the Institute (laptops, tablets and smartphones) and is largely used by researchers and fellows.

The service aims to facilitate the integration of private equipment with the IT infrastructure of the EUI (according to the BYOD philosophy). It therefore focuses mainly on the configuration of the following services:

- personal and shared network areas;
- VPN connection;
- the wireless networks of the Institute;
- EUI email;
- network printers.

Moreover, the service provides support for the installation of campus software and advice on any other IT problems (operating system updates, viruses and security, etc.). This service is to be considered level one.

Lastly, the Portable Support Service is responsible for welcoming new members, presenting and representing the ICT Service, and providing induction training on the use of the various services offered.

The service does not offer hardware support (only diagnostics).

The service is accessible to the public. The relevant Portable Support Officer receives tickets assigned by the Helpdesk or opens tickets for those users who contact the service in person or via email.

The service is currently operated by 1.5 (one and a half) trainees, to be replaced by **1 (one)** FTE by means of this tender procedure.

10.4. Print Support

Print Support handles all problems related to printing services (infrastructure, accounting, print quotas, etc.). It is operated by the supplier contracted for network printing services and considered level one.

10.5. Tel Support

Tel Support mainly deals with the administrative management of the telephone network (both fixed and mobile), such as billing, telephone quotas, etc. being technical support provided directly by level one operators. Tel Support is to be considered level two.

10.6. Tier 2 Support Units

The T2 support units consist of engineers and specialists who manage and maintain the IT infrastructure of the Institute, such as network, server, email engineers, etc. They work mainly on-site, from the main office of the ICT Service.

10.7. Other Support Services not related to the ICT Service

10.7.1 Audio-visual Support

This service is provided by the company awarded the contract for the management of the conference rooms (TecnoConference). In addition to the equipment installed in the conference rooms, it provides support for the various audio-visual equipment found in the Institute (screens, projectors, microphones, etc.), and manages all video conferences. This service falls under the responsibility of REFS.

10.7.2 Library Support

This service manages access to the electronic resources of the Library and is made up of staff from the Library.

11. Regulatory Obligations to be borne by the Company

The Company shall be entirely responsible for the provision of the Service that is the object of this tender procedure. A more detailed description is contained in the Draft Contract in **Article II.1 (Annex P)**.

If so requested by the Contracting Authority, the Company shall be ready at any moment to provide clear proof of having fully complied with such obligations.

11.1. Work Regulations

The Company is obliged to apply the **collective agreements** and any supplementary agreements at provincial level in relation to the site; in particular:

- a. The Company shall apply, for the staff members providing the Service, contractual and remuneration conditions that are at least equivalent to those envisaged by the applicable national collective labour agreements, valid at the time of signing the contract, as well as any conditions that may be introduced by later amendments and improvements and, in general, by any other successive collective labour agreement for the relevant category of workers valid in the Province of Florence.
- b. The Company shall continue to apply the conditions of the collective agreements even after their expiry, until they are replaced or renewed. These obligations shall be considered binding for the Company, even if the Company is not a member of a professional association that has signed the collective agreements, or has resigned from one.
- c. Should the Contracting Authority ask for it, the Company shall submit all necessary documentation proving that the treatment – in terms of salary conditions and social security contributions – of its employees engaged in the Service for the EUI is in full compliance with the conditions agreed upon. Should the Contracting Authority find that the Company is in violation of the labour laws, it will first communicate its findings to the Company and then report the matter to the Labour Inspectorate competent for the question. It shall further reserve the right to enforce and take possession of the performance bond, and the Company shall be obliged to produce a new performance bond. The sum shall only be returned when the Labour Inspectorate declares that the Company has remedied its violations of the labour laws.
- d. **In the event of a takeover of the contract, the Company shall take on all the workers employed under the contract, guaranteeing, in accordance with the amended technical and organisational requirements, the respect of the agreements currently in force and resulting from the supplementary bargaining agreements signed by the current tenderers and by trade union organisations.**

In this regard, in order to facilitate bargaining and the respect of privacy regulations, the Contracting Authority will provide CVs and the salary scale of the people involved, **upon explicit request and only after the compulsory site inspection**, sent via email to ICTS.Tender1-17@EUI.eu, by **15:00 pm on 05.07.2017 (deadline for the submission of queries or clarification requests)**.

11.2. Safety Regulations

The Company shall comply with all obligations towards its employees, as envisaged in the legal requirements and provisions relating to labour laws, including all measures pertaining to health and safety in the workplace, as well as regulations on social security and accident prevention, fully accepting to bear all costs related to such obligations.

In addition to its contractual obligations, the Company shall ensure that the equipment provided to its staff and used to perform the Service complies with the applicable safety and accident prevention regulations.

For the Service covered by these Special Tender Specifications, there are no discernible risks of interference for which specific safety measures need to be adopted. It is therefore not necessary to envisage the implementation of the DUVRI (Interference Risk Assessment Document) **provided for by Art. 26, paragraph 3 of Legislative Decree 81/2008**.

For this reason, safety costs due to interference with other operations have not been calculated. If such costs arise, then the Contracting Authority shall prepare the Interference Risk Assessment Document and calculate any related costs for the elimination or reduction of these risks.

11.3. Regulations on Personal Data Processing

The Company shall observe and oblige its employees, agents or associates to observe the following:

- a. rules of strict confidentiality regarding facts and circumstances that they may have become acquainted with in the performance of their duties, in compliance with the existing laws as well as in observance of the Institute's internal regulation which can be consulted at: <http://www.eui.eu/AboutTheWebsite/DataProtection.aspx>. This includes the obligations of professional secrecy with respect to all data – economic, financial, ownership, statistical, personal and/or of any other type – relating to the Contracting Authority's activities. Under no circumstances shall the unauthorised removal and disclosure of such data be allowed; the occurrence of such an event shall entitle the Institute to terminate the contract and to claim compensation for damages caused by any misuse of the data;
- b. ***The Declaration of Commitment, signed by the Company, on personal data processing, IT security and, in particular, the role of the system administrator*** as regards the use by the employees of the Company of computer accounts and electronic mailboxes, for the sole purpose of providing the service required.

11.4. Regulations on IT Security

To use the IT systems and infrastructure of the EUI, to receive an account and electronic mailbox (where applicable) from the EUI, all staff have to sign the general conditions on concession and use contained in the following policies:

- [EUI IT Acceptable Use Policy](#) (AUP), on the use of IT systems and infrastructure of the Institute;
- Policy on the provision of EUI user accounts to the staff of the external contractor;
- Policy on the provision of EUI electronic mailboxes to the staff of the external contractor.

The Company shall examine these policies and ensure that its employees **know and respect these policies**, particularly those on IT security, by adhering to the regulations enforced by the Contracting Authority (e.g. [Strong Password Policy](#), etc.) and by implementing the relevant best practices.

12. Patents and Copyright

The EUI shall not be held liable in the event that the Company, in performing this contract, makes use of equipment and/or technical solutions that have been patented by others.

The Company undertakes to hold the Institute harmless from any claims, liabilities, including losses and damages claimed by any person(s), as well as from all expenses resulting from any copyright infringement.

Both Parties undertake to immediately notify the other of any claim or damage request from a third party – that may come to their notice – in relation to the issues described in the preceding item.

The Company shall observe all the provisions on the Legal protection of software in Council Directive no. [2009/24/EC](#) and later.

13. Costs and Obligations to be borne by the Company

The Institute shall not be held liable for any cost relating to the performance of the Services regulated by these STS, including by way of example, but not limited to:

- training costs for the staff providing the Service (as per [Article 25](#));
- costs for the integration of the Helpdesk phone line with the IT infrastructure of the Client;
- costs related to the calls made by the Helpdesk;
- costs for the provision of any Personal Protective Equipment (PPE) needed to work in safety, if required;
- costs for the equipment referred to in [Article 6.2\(f\)](#), including costs related to working on the go, such as voice and data plans;
- uniform costs.

Furthermore, from the date on which the Service begins, the following shall also be the responsibility of the Company:

- ordinary and extraordinary maintenance of all equipment and devices that are the property of the Institute and have been made available to the Company for its use in the execution of this Service;
- the cost of additional equipment and devices that the Company decides to supply, with the prior agreement of the EUI, including any cost incurred during their installation, deployment and removal at the termination of the contract.

The Institute further reserves the right to check, at any time, the effective condition of the facilities, the equipment, the utilities and the furnishings made available to the Company for the provision of the Service, the training level of the staff, the equipment and PPE, etc.

The Institute reserves the right, at any moment and with no prior warning, to carry out inspections in order to ascertain that the Company is providing its services in full conformity with the content of these STS.

The Institute shall be liable for the costs relating to: cleaning of the premises, water supply, electricity supply, data transmission, air conditioning and maintenance of the central heating system.

14. Breaches, Non-compliance and Penalties

Except for cases in which the law specifies different penalties, the EUI reserves the right to uphold the terms and conditions of these STS by applying the penalties envisaged in this Article, over and above claiming reimbursement for any extraordinary expense incurred in ensuring that EUI activities continue to function regularly.

The application of penalties is governed by **Article I.10** of the Draft Contract (**Annex P**).

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. The Institute reserves the right to sanction other behaviours that may affect and/or interrupt the normal provision of services.

1. For each instance of failure to observe working hours without suitable justification (except in cases of *force majeure* or reasons imputable to the Contracting Authority), that is repeated more than **3 (three) times a month**, a penalty of **€250.00** per instance will be charged to the Company; if the instance of failure to observe working hours exceeds **15 (fifteen) calendar days**, the Institute shall apply a penalty of **€1,000.00** per instance; should this case of non-compliance persist for more than **1 (one) month**, the Institute reserves the right to terminate the contract and claim damage compensation.
2. In the event of delayed, non-compliant and/or failed replacement of the on-site technical support (in the event of vacation/sickness), except in the case of *force majeure*, the Company shall be charged a penalty of **€200** for every **1 (one) hour of delay**; should the delay last longer than **15 (fifteen) calendar days**, the Institute shall charge a penalty of **€1,000** for every **1 (one) hour of delay**; should the delay persist for longer than one month, the Institute reserves the right to terminate the contract and claim damage compensation.
3. For each case of violation of privacy or 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, a penalty of **€1,000.00** shall be applied.
4. In the event of delayed, non-compliant and/or failed start-up of the Helpdesk, except in the case of *force majeure*, the Company shall be charged a penalty of **€200** for every **1 (one) hour of delay**; should the delay last longer than **15 (fifteen) calendar days**, the Institute shall charge a penalty of **€1,000** for every **1 (one) hour of delay**; should the delay persist for longer than **1 (one) month**, the Institute reserves the right to terminate the contract and claim damage compensation.
5. For each case of non-compliance by the Technical Supervisor with the regulations on communicating all activities, technical problems and possible resolutions only and exclusively to the ICT User Support Technical Supervisor or, in his absence, to the ICT User Support Coordinator, the Institute shall apply a fine of **€ 500.00**;
6. For not appointing a Responsible Officer, the Institute shall apply a penalty of **€1,000**.

These penalties will be applied through debit notes. The penalty shall be deducted from the amount due for payment.

Where, for whatever reason, the penalties or the compensation due for the damage caused to the Contracting Authority are not covered, then the Contracting Authority shall recover its loss from the bid bond.

Claims and/or the payment of penalties does in no way exempt the defaulting Company from fulfilling its obligations.

The EUI shall be notified of any *force majeure* causes delaying the activities governed by these STS; notification shall be sent by the Company, by registered letter with acknowledgement of receipt, preceded by an urgent pre-notification sent by email to the Director of the EUI's ICT Service; the Company shall provide evidence of said *force majeure* causes, upon pain of losing any right to invoke them, to the ICT Service at the European University Institute, Piazza Edison, 11 – 50133 Firenze (FI).

If more than **3 (three)** penalties are applied in a period of **6 (six)** months, the Contracting Authority reserves the right to terminate the contract and retain the bid bond.

In this case, the Institute reserves the right to take legal action as provided by the Law.

Part II – Specific Characteristics of the Service

15. On-site Technical Support

The purpose of on-site technical support is to provide level 1 IT support to users, including academic and administrative staff, PhDs, researchers, research assistants, visitors, partners, guests and retirees. The Service will have to ensure the proper functioning of the IT equipment and services located and available at designated premises and foresee possible malfunctions in order to ensure a continuous and efficient service.

15.1. Positions and Staff

The Service will have an ICT User Support Officer ([Article 10.2](#)) and Portable Support Officer ([Article 10.3](#)), to be broken down as follows:

- ICT User Support Officer: **5x FTEs** (the equivalent of 100% of the current staff);
- Portable Support Officer: **1x FTE** (the equivalent of 2/3 of the current staff).

These new positions will be distributed as per [Article 15.2](#). However, as **all** technical staff members are expected to have the same skills ([Article 6.1.1](#)), **the officers will need to be able to replace each other, according to the service needs of the Client.**

With regard to staff, see [Article 22.1](#).

15.2. Premises and Working Hours

The offices of the On-site Technical Support Service shall be located on the following premises:

- the Badia Complex: **3 (three) FTEs** (2x *ICT User Support Officers* and 1x *Portable Support Officer*);
- the Villa Salviati Complex: **1 (one) FTE**;
- the Villa Schifanoia Complex: **1 (one) FTE**;
- Villa La Fonte: **1 (one) FTE**.

The Service shall begin operating from the “main” premises listed above, but this may change based on the service needs of the Client, as indicated in [Article 7](#).

The On-site Technical Support Service shall be provided on the Institute’s current premises, **as well as in any future buildings that may be added to the premises during the lifetime of the contract.**

The Company shall run the daily Service as follows:

- a. on all working days of the Institute (about 225 days/year), **Mondays to Fridays**;
- b. **from 8:00 to 18:00**;
- c. with **8 (eight)-hour shifts**, with a break of **1 (one) hour**, usually taken between **12:00 and 14:00**, in order to cover the morning shift of **8:00-17:00** and the late shift of **9:00-18:00**;

The hours described above are clarified in **Table 1**:

WORKING HOURS OF THE ON-SITE TECHNICAL SUPPORT SERVICE							
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	CLOSED
8:00-18:00	8:00-18:00	8:00-18:00	8:00-18:00	8:00-18:00	N/A	N/A	N/A

Table 1 – Working Hours of the On-site Technical Support Service

IMPROVEMENT FEATURE 01: *monitoring and remote support extended until 19:00 (with respect to Table 1), at the same cost:* clearly describe how this feature may be implemented;

IMPROVEMENT FEATURE 02: *Portable Support Officer available, at the Contracting Authority's discretion, from 9:00-12:00 and 14:00-19:00 (with respect to Table 1), at the same cost:* clearly describe how this feature may be implemented.

The opening and closing days of the Institute, as well as the opening hours of the Library are indicated in Annexes M and N respectively. **Each year, the Company shall request a new, updated calendar indicating the public holidays of the Institute and check the opening hours of the Library.**

15.3. Activities

The technicians shall perform the following activities:

- 1) on-site and remote interventions and inspections;
- 2) installation, configuration, maintenance (preventive, ordinary and extraordinary), replacement and removal of desktops, laptops, tablets, mobile and fixed phones;
- 3) installation, distribution, maintenance, updating and removal of operating systems, software and licences;
- 4) desktop and laptop cloning (Windows and Mac environments);
- 5) Active Directory: create an account, join computers to a domain, reset passwords;
- 6) wired and wireless network configuration;
- 7) email configuration;
- 8) continuous and systematic support for all users to ensure the correct use of available IT services (troubleshooting, diagnosis, etc.);
- 9) assistance with the creation of Apple ID or Microsoft Live accounts, etc.
- 10) troubleshooting authentication, accounting and payment systems (timestamp, POS, etc.);
- 11) on-the-job training, trainee assessment (by the Institute) and preparation of the assessment report;
- 12) management of calls to external companies for service repairs under warranty, etc. (sending in the equipment and/or providing assistance to the technicians of the external company);
- 13) provide assistance to any external company operating on behalf of any one of the Contracting Authority's Service Providers;
- 14) asset management, including inventory management;
- 15) creation and updating of knowledge management;
- 16) removing paper jams and/or adding paper to the printer (in the absence of the relevant technician);
- 17) administrative formalities and/or reference regulations (goods return notes, waybills, disclaimers, purchase initiations, etc.);

- 18) handling IMAC requests (Installation, Move, Add, Change) together with the other technical units involved (e.g. office movers, etc.);
- 19) news management, including “door-to-door” updates on the sub-optimal status of the IT infrastructure;
- 20) welcoming, inducting and mentoring.

In addition to the above activities, **2 (two) technicians** working in the Service (one main person and a backup) may be asked to carry out the following activities, usually assigned to T2 support staff:

- 1) create accounts in the directory service with existing scripts;
- 2) manage Active Directory account properties (password and expiration date);
- 3) modify access rights for sharing through group membership;
- 4) manage disk quotas assigned to users.

Given the sensitivity and criticality of these activities, the Institute shall reserve the right to appoint the most appropriate technicians.

15.4. Equipment

- 1) The technical staff of the Service (including the staff on standby) shall have all the necessary equipment, including a laptop, tablet and mobile phone with a voice and data plan, to do their job on the move. The EUI can provide a mobile phone with a voice and data plan and/or a SIM card with a data plan for an annual fee (phone rental and tariff plan fee). **The Competitor shall have to indicate in its Technical Offer if it intends to make use of this option;**
- 2) The technicians shall have to provide a telephone number to be used within and outside of normal office hours (only for technicians on standby);
- 3) As the technical staff will be travelling from one building to another by car, they will need to have a valid driving licence (**Category B**), as provided for by [Article 23](#);

15.5. Procedures for providing the service

The technicians will handle requests for support until they are fully resolved. To do so, they will have to deal with other level one and T2 support staff and, possibly, with technicians not from the ICT Service or Institute, using, where appropriate, existing systems to track activities and adapt to the procedures established by the Client.

The technicians will be assisted by one or more trainees (from UK universities where they are studying Computer Science, for a period of one year) supervised by the ICT User Support Technical Supervisor. They shall report to the ICT User Support Coordinator.

The technical staff shall travel with their own means of transport, suitable for the delivery of small loads.

The technical staff shall use both Italian and English (they will have to have proven comprehension, oral expression and writing skills, as provided for by [Article 23](#)) to interact with the staff of both the academic and administrative units of the Institute, as well as third companies and suppliers.

To perform their duties, the technicians shall use one or more of the Institute’s standard desktops and a fixed telephone. They shall use the equipment provided by the Company so as to work on the move.

Depending on the case, the technician shall provide assistance on-site or remotely.

Keeping in mind the crucial importance of this service, the Tenderer must guarantee the timetable for substitutions in the event of absence (illness/holidays) as defined in **Table 2**, or face the penalties provided for in [Article 14](#):

TIMETABLE FOR SUBSTITUTIONS IN CASE OF ABSENCE	
During working hours	Off-hours
1 (one) hour	NBD (Next Business Day)

Table 2 – Timetable for Substitutions in Case of Absence

Calculation of the time will be based on the hour of communication by the technician and/or the Contracting Authority to the Company.

In the Technical Offer (**Annex E**) the Tenderer should pay particular attention to indicating how it intends to communicate and carry out the substitution of staff in case of absence.

The annual costs of the Service shall be indicated in the Economic Offer (**Annex F**) under the item “On-site Technical Support Service”. The item shall be the sum of the all-inclusive cost of each single FTE involved in the on-site technical support service.

16. Off-site Technical Support

One or more of the technicians on the On-site Technical Support Team ([Article 15](#)) can be contacted telephonically on a toll-free number or another number at the cost of an urban call from the district of Florence, off-hours, on days on which the EUI is closed and on weekends (on standby).

16.1. Positions and Staff

The staff of the On-site Technical Support Service shall be used for this Service too ([Article 15.1](#)).

With regard to staff, please see [Article 22.1](#).

16.2. Premises and Working Hours

With regard to the premises, please see [Article 15.2](#).

The Service shall be provided in the hours indicated in **Table 3**:

WORKING HOURS OF THE OFF-SITE TECHNICAL SUPPORT SERVICE							
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	CLOSED
18:00-22:30	18:00-22:30	18:00-22:30	18:00-22:30	18:00-22:30	8:00-22:30	8:00-19:00	8:00-19:00

Table 3 – Working Hours of the On-site Technical Support Service

16.3. Activities

See [Article 15.3](#).

16.4. Equipment

See [Article 15.4](#).

16.5. Procedures for providing the service

Based on the type of problem, the technician shall provide assistance on-site or remotely.

Incidents needing processing can be **Emergencies** or **Scheduled**. Scheduled assistance will be organised with the Company, with a minimum notice of **5 (five) working days**.

Activities for which the assistance of the Off-site Technical Support Service may be requested include, but are in no way limited to:

- emergency incidents;
- referenced user support;
- installation, configuration, maintenance, replacement and/or scheduled removal of hardware and software;
- large-scale cloning.

On-call (off-hours or standby) support can either be **paid** or constitute **banked time (time off in lieu)**, to be agreed upon with the Company each time:

Paid support will be settled according to the “Hourly Rates for Off-hour Interventions” provided in the Economic Offer (**Annex F**). In the case of **banked time**, the Company shall not receive any additional remuneration; instead, the technician will be offered time off in lieu.

To quantify the banked time, the Company shall specify the necessary “Compensation Coefficient” in the Economic Offer (**Annex F**) to determine the number of standard working hours that can compensate **1 (one) hour** of off-hours work.

IMPROVEMENT FEATURE 03: Off-hours assistance does NOT mean a minimum number of payable hours/banked time (e.g. half a day) but only “full” hours (e.g. 1,5hrs intervention will be calculated as 2hrs).

17. Helpdesk Service

17.1. Positions and Staff

The staff manning the Helpdesk shall be sufficient to guarantee the requirements indicated in **Article 22.2**.

The **fixed staff** of the On-site Technical Support Service shall be used as **back-up** for the Helpdesk ([Article 15](#)).

With regard to staff, please see [Article 22.2](#).

17.2. Premises and Working Hours

The Helpdesk is a critical service for the Institute, and is therefore constantly monitored and evaluated. The aim is to create an internal knowledge base and outsource the Service. As such, **during the first year of the contract, the Helpdesk will have to operate from the Contracting Authority, without any added burden for the Contracting Authority.**

In its Technical Offer (**Annex E**), the Competitor will have to indicate clearly how it intends to provide the Service during the first year of the contract in order to fulfil the requirements under [Article 22.2](#).

From the **second year** of the contract, the Service can be fully outsourced. This will be considered a **“trial period”** for the Contracting Authority, during which time it can evaluate the usefulness of it being outsourced.

From the **third year onwards**, the Institute shall assess whether or not to continue to outsource the Service or re-introduce it at the Institute for all subsequent years.

Notwithstanding the fact that in the first year of the contract the Helpdesk shall be on-site and that it is an integral part of the Service and should therefore be included in the Economic Offer (**Annex F**) under the item “Helpdesk Service”, the Competitor will have to indicate clearly the item “Optional On-site Helpdesk Service”, **from the second year onwards**, if the Institute reserves the right to prefer this solution.

For the duration of the contract, the Helpdesk Service shall operate during the hours indicated in **Table 4**:

WORKING HOURS OF THE HELPDESK							
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	CLOSED
8:00-18:00	8:00-18:00	8:00-18:00	8:00-18:00	8:00-18:00	N/A	N/A	N/A

Table 4 – Working hours of the Helpdesk

On Saturdays, Sundays and official closing days of the Institute, users will be able to open tickets by means of the self-service ticketing system. These tickets will only be processed on the first day on which the Institute re-opens. On the same days, a voice message will inform those who contact the Helpdesk telephonically that it is closed, but that they can open a ticket via the portal or email. **When planning**

the Service, the Competitor will have to bear in mind the resulting extra workload to be handled when the Institute re-opens.

In exceptional cases, that can or cannot be scheduled, the Institute may request the availability of the Helpdesk Service on Saturdays, Sundays or on official closing days, both on-site and off-site, between 8:00 am and 6:00 pm. The hours can be worked in half days of 5 hours each, as described in **Table 5**:

WORKING HOURS OF THE HELPDESK – OFF-HOURS							
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	CLOSED
N/A	N/A	N/A	N/A	N/A	8:00-13:00 13:00-18:00	8:00-13:00 13:00-18:00	8:00-13:00 13:00-18:00

Table 5 – Working Hours of the Helpdesk – Off-Hours

Incidents for which the services of the Helpdesk may be required include, but are not limited to:

- the breakdown and/or lack of access for entire buildings;
- security threats or breaches (e.g. repeated phishing attempts).

In some cases, for example when a crisis unit needs to be setup within the Institute, the Company may be required to provide an On-site and Off-hours Helpdesk Service, even if the Service has already been outsourced (for example, from the second year of the contract).

Therefore, the Competitor will have to indicate clearly in the Economic Offer (**Annex F**) the costs (in particular, for off-hours) related to an on-site **and** off-site **Off-hours** Helpdesk Service.

17.3. Activities

The core business of the Helpdesk consists of a level 1 Service Desk and a Follow-up and Quality Control Service.

The main activities of the Helpdesk can be summarised as follows:

- receive, categorise and register tickets;
- communicate the ticket number to the user (normally done automatically by the ticketing system);
- classify the request according to urgency and impact and assign a priority level (as defined in **Annex K**);
- offer level 1 support for ICT and REFS problems to all members of the Institute, guests and external visitors;
- provide contacts for off-topic problems (not ICT- or REFS-related);
- assign and manage tickets according to the ticket assignment workflow;
- ensure that the correct information (status, solution, etc.) is registered and communicated to the user;
- quality control of every ticket;
- create and update the internal knowledge base;

- participate (at least in the first year) in coordination meetings and have an active role in projects related to the development and/or expansion of the Helpdesk.

When closing a ticket, the Helpdesk will ensure that the solution provided is coherent and clear and that it can be used for recurring incidents.

At the request of the relevant Service Manager and/or Project Manager, the Helpdesk will also communicate, to certain groups of users, specific information, including:

- variations in services, including those of the Helpdesk;
- incidents;
- stop times;
- scheduled maintenance.

17.3.1 Level one support

The main activities of level one support are:

- 1) SPOC (Single Point of Contact), including:
 - a. Follow-up on requests for support
 - b. Dispatching tickets
- 2) Service Desk or First call support, including:
 - a. Incident Management
 - b. Request Management
 - c. Problem Management
 - d. Change Management

Specifically, the Helpdesk registers the user's call by opening a ticket for each type of request (incident, problem, request, change) and/or (re-)categorises the tickets created by a user via the Self-Service Desk (via portal or email); the Helpdesk gathers information from the end user and integrates it with the information provided by the system; the Service resolves and/or assigns the ticket to the T2 technical units or the line managers.

In order to ensure that the ticket best represents the request, the Helpdesk staff is required to gather from the user (either by telephone or by e-mail) and, if necessary, convey to the technical units via the ticketing system, the user's data (status, location, contact details, etc.) and IT environment (e.g. client type, operating system, etc.), as well as the following information:

- initial assessment;
- action taken;
- opinion/point of view of the end user.

The quality of the ticket must be such that:

- the request is understood perfectly, so that the technical units that receive it can analyse it further;
- a search for keywords can be done in the knowledge base or in other open and closed tickets;

- it can be correctly categorised and prioritised;
- tasks, work orders and sub-tickets can be assigned;
- significant statistics can be generated.

17.3.2 Follow-up and Quality Control

The Helpdesk “owns” and is ultimately responsible for all tickets, including those assigned to specialised technical units (e.g. second tier), until they are fully resolved.

Standard Operating Procedures (SOP) are used to manage ticket escalation.

All technical units that play an active role in the resolution of tickets, even those that do not use the same administration tools, will communicate the status information of the tickets via the portal or by email to a dedicated mailbox of the Helpdesk. In this case, it is the responsibility of the Helpdesk to incorporate the relevant information into the Service Desk tool and close the ticket when appropriate.

The Helpdesk staff is also required to do follow-up on normal support activities, including by way of example, but not limited to:

- 1) Favour a high index of level one resolution, by assigning tickets to on-site technicians with the skill-set needed;
- 2) Check unresolved tickets, send reminders and/or alerts to the technicians dealing with them or escalate the ticket to a manager;
- 3) Ensure efficient floor management, for example, by re-assigning tickets based on the workload of T2 (queue management);
- 4) Monitor and escalate complex tickets to managers to avoid a risky situation for the service;
- 5) Avoid an excessive re-assignment of tickets (the so-called ping-pong effect) amongst T2 technical units, by using flags, tasks, work orders, etc. or escalating the ticket to a manager;
- 6) Provide greater and better follow-up for end users with urgent/critical tickets and monitor the progress of these tickets so that they are resolved within the time frame established by SLAs and KPIs, for example, by ensuring that the technicians handling these tickets are processing them, etc.;
- 7) Check the accuracy of the data entered in the ticketing system;
- 8) Initiate an escalation process up the hierarchy ladder, based on the urgency/impact grid;
- 9) Create and update the knowledge base (knowledge management);
- 10) Generate, upon request, statistics to check KPIs and SLAs.

Finally, it is the responsibility of the Helpdesk to oversee compliance with SLAs and any Operation Level Agreements (OLAs) established with third party support and service providers.

17.4. Equipment

The Institute will provide the Helpdesk with its ITSM (Ticket and Asset Management Portal), SCCM console and various remote connection tools (Microsoft Terminal Services, TeamViewer, etc.).

The Institute will also provide access to shared areas containing the current knowledge base (KB) and campus software.

The Helpdesk will be authenticated by the Intranet of the Institute through remote access VPN.

The Institute will provide a number for incoming calls, which will be forwarded to the Call Centre of the Helpdesk staff.

The Company will have to use its own existing Automated Call Distribution (ACD) infrastructure and use **at least 2 (two) phones lines** and voicemail if lines are busy for other callers up to **5 (five)** simultaneously. The Company will also be responsible for the implementation and maintenance of automatic response messages and any dispatch rules and/or selection menus, to be agreed with the Client.

The telephone network used must be able to produce monthly reports with, *inter alia*, the following details:

- 1) incoming calls: date and time, caller's ID, duration
- 2) outgoing call: date and time, call direction, duration

Any charges incurred by the Client for forwarding a call via its telephone network shall be borne by the Company.

17.5. Procedures for providing the service

The Helpdesk Service shall be offered on-site or outsourced, as indicated in [Article 17.2](#).

The services of the Helpdesk shall be provided as follows:

- via the Call Centre set up by the Company
- via email, i.e. Outlook (email addresses supplied by the Client);
- via the ITSM system provided by the Client;
- remotely, with the Client's tools (SCCM, TeamViewer, remote connection, etc.)

The Competitor will have to guarantee the working hours specified in [Article 17.2](#). Moreover, the Competitor will have to guarantee the **service of the Off-hours Helpdesk at minimum 4 (four) hours notice from the Institute**.

The Helpdesk will have to contact users by phone when asked explicitly to do so.

The cost of the calls shall be borne by the Company. For a more comprehensive and complete Economic Offer, **Annex J** provides a detailed list of the numbers and duration of the outgoing calls made by the existing EUI Helpdesk. The list indicates the call direction (toll free, mobile, national, international, including the name of the country) for the financial years 2014, 2015 and 2016.

The Company awarded the tender shall be liable for any charges relating to the data plan used to provide the outsourced services that are the object of this tender procedure.

Keeping in mind the crucial importance of this service, the Tenderer must guarantee its complete functionality even during the on-premise phase (first year and any years beyond that) in case of absence of the appointed on-site staff, or face the penalties provided for in [Article 14](#).

In the Technical Offer (**Annex E**) the Tenderer should pay particular attention to indicating how it intends to communicate, carry out the substitution and/or cover for on-site staff in case of absence (e.g. transferring calls to the Company's centralised call centre, etc.).

To simplify the accounting management of the Helpdesk, the Service will be valued based on a fixed number of users and not according to the number of processed and/or resolved tickets.

Therefore, the Competitor shall estimate an all-inclusive amount in the Economic Offer, under the item “Helpdesk Service”, for a Helpdesk that can operate on a critical mass of **1,600 (one thousand six hundred) users**, with a margin of **+/- 5 %**.

This number has been calculated according to the number of members present in the Active Directory DLeverybody group, which the Contracting Authority considers sufficiently representative of the average number of on-site users.

The Competitor shall estimate the surcharge for every user over and above the upper margin of tolerance ($1,600 + 5\% = 1,680$), i.e. for 1,681 users and upwards.

To apply surcharges, the Competitor shall ask the Responsible Service for the number of members in the DLeverybody group. This formal request shall be done in writing and on a regular basis. The months of August, September and October shall not be taken into consideration for the surcharge as they mark the coexistence of previous academic year users (soon to be deleted) and new academic year arrivals.

Should the number of members exceed 1,680, the Competitor shall apply the estimated **surcharges** featured in the Economic Offer under the item “Surcharge for Single User”, **in reference to the count requested.**

Lastly, the Competitor shall estimate a surcharge per body for up to **300 (three hundred) extra users** (to be included under the item “Extension to 300 users”) as a result of the increase in size and structure of the Institute, as mentioned in [Article 8](#).

18. Interruption of the Service and Contingency Plan

Depending on the nature of the interruption, the Company shall act as follows:

a. *Temporary interruption of Service due to industrial action by Company's staff*

Service continuity shall be guaranteed, even if the staff employed by the Company is on strike.

If necessary, the Company and the Contracting Authority can agree upon organisational solutions of an extraordinary nature. If this occurs, the Company shall not be entitled to make any further requests, neither claims of a financial nature, nor demands relating to organisational or contractual issues.

b. *Temporary interruption of service due to technical failures or breakdown*

In case of technical failures and breakdowns affecting the facilities and structures, such that the Service cannot be provided, the Company's staff will be entitled to temporarily interrupt standard activities and to agree with the Contracting Authority on alternative organisational solutions to be implemented.

c. *Total interruption of service due to events of force majeure*

Total interruptions of Service due to events of force majeure shall not be deemed the responsibility of either Party. For a detailed definition of what is meant by force majeure, see **Article II.11 of Annex P – Draft Contract**.

Tenderers must include in the Technical Offer (**Annex E**), on pain of exclusion, a **Contingency Plan** ensuring as much as possible the continuity of the specific operations at any moment.

The presentation of a detailed Contingency Plan based on analysis and planning of Incident Response, Disaster Recovery and Business Continuity, set in place to avoid or mitigate any interruption of the supplied services, will be taken into consideration in the evaluation that assigns points to companies during the scoring procedure.

19. Intervention Times and Service Levels

Intervention times are determined by standard criteria, such as:

- number and type of users (e.g. referenced users);
- effects on business mission;
- context of problem;
- deadline;
- estimated resolution time;
- services involved;
- frequency of problem;
- user's perception of priority;
- workaround availability;
- risks to data or system integrity.

The incidence and severity of the above criteria determine the priority level (critical, high, medium, low), as defined in **Annex K**.

The intervention times will be regulated by Service Level Agreements (SLAs), as shown in **Appendix L**. These Agreements shall include, but will not necessarily be limited to:

- average speed of answer (ASA);
- percentage of abandoned calls;
- ticket assignment time;
- time of first contact with tickets opened via self-service;
- call-back time;
- closing ticket time after ticket is resolved;
- satisfaction index.

Unless otherwise indicated, SLA performance will be measured **monthly**. All SLAs measured through "completion times" or "resolution times" will be suspended outside of service hours.

Only under special conditions and with the agreement of the Institute, shall the SLAs be suspended for a defined period of time.

20. Execution of the Service

In order to ensure that its service provision begins correctly, the Company shall:

- adopt, within **15 (fifteen) days** from the day the tender is awarded, the **Transition Plan**, i.e. replace the existing contract as provided for by [Article 43](#);
- submit, within **15 (fifteen) days** from the day the tender is awarded, to the Service in charge (EUI's ICT Service) the **final list of the staff members** who will be providing the Service, providing:
 - name and surname;
 - position;

- mobile number;
 - date and place of birth;
 - digital passport-size photo.
- submit, within **30 (thirty) days** from the day the tender is awarded, to the Service in charge a **list of the equipment** provided to its own staff, indicating:
 - brand and model of all items of equipment;
 - recipients of the equipment (if the equipment varies);
 - accessories included.

At the sole discretion of the EUI's ICT Service, any of the equipment provided by the Company that is not suitable for the execution of the Service described in this tender procedure shall be withdrawn and replaced within **15 (fifteen) days** by models deemed suitable for the purpose of the Service.

For the entire duration of the contract, at least two types of meetings will be foreseen on a regular basis, involving the Contracting Authority, the support team, the Reference person for the contract, and the Company's Technical Supervisor (if appointed). All the meetings will be chaired by the Contracting Authority.

The "Support" meetings will be aimed at updating the support team as regards new procedures, planned interventions, etc., as well as drawing attention to any problems encountered by the support team in performing the Service (even through the use of case studies). The meetings will be held approximately every **2 (two) weeks**. For the Contracting Authority, the ICT User Support Technical Supervisor and/or the ICT User Support Coordinator will participate, and for the Company, the Technical Supervisor (if appointed) and the entire on-site support team, including at least one member representing the Helpdesk for as long as this Service continues to be carried out on premise; once the Helpdesk Service is completely externalised the Helpdesk participation will take place by means of videoconference (via Skype for Business).

The purpose of the "Contract" meetings will be to formalise with the Company the current situation of the Services being provided, the personnel involved, etc., and plan any corrective measures needed. The meetings will be scheduled monthly or as necessary. For the Contracting Authority, the ICT User Support Technical Supervisor and/or the ICT User Support Coordinator will participate, and for the Company, the Responsible Officer.

The Company will be responsible for the minutes of all the meetings, for which the Institute will provide a special standard form. The minutes will include only facts, decisions, and actions discussed during the session and will be issued not later than **five (5) working days** after the meeting and circulated amongst all the participants, both present and excused. At each meeting the chairman will distribute the minutes of the previous meeting. The respective persons in charge will take care of communicating the minutes internally amongst any other staff involved (such as backup technicians, second level, etc.).

Part III – Staff involved in the provision of services

21. General Provisions regarding Staff

The services provided under this tender procedure shall be carried out by the Company under its sole responsibility. The staff providing the Service must be **directly employed by the Company awarded the tender**. The Company is required to submit a Unified contract of employment (*Unilav*) by no later than the start date of the Service.

At least **5 (five) days** prior to the start date of the contract, the Company shall provide the Contracting Authority with the following documentation regarding the staff of the Service:

- A full list of the **staff selected by the Contracting Authority for the Service**, accompanied by the place and date of birth, qualifications, and insurance and social security details of each employee;
- A copy of the Single employment ledger of each staff member included in the tender procedure (*Libro unico del lavoro*);
- A copy of the staff records of the employees (letter of hire);
- A copy of their criminal records;
- A copy of Form D.M. 10 – Receipt of UNIEMNS (monthly contributions to Italy's National Social Security Institute - *INPS*).

The same documentation must be submitted whenever changes or substitutions are made to the staff or when new employees are recruited. The documentation must be submitted within **3 (three) days** of any changes.

Where one or more staff members of the Technical Support Service or Helpdesk are replaced, the Company is obliged to inform the Contracting Authority. **The latter reserves the right to accept or reject**, following an interview, the proposed staff members.

The Contracting Authority reserves the right to ask the Company to replace any staff deemed unfit for well-founded reasons. In this case, the Company make the necessary substitution within **10 (ten) working days** of the request, without this constituting any additional burden for the Contracting Authority.

When executing the Service on the premises of the Contracting Authority, the staff shall:

1. clock in and out at the time clock (clock card machine) located at the entrance of each building of the EUI and use the EUI Card (their ID badge when on-site) provided by the Contracting Authority;
2. ensure their EUI Cards are visible at all times, and
3. have another identification document on them (e.g. ID);
4. wear a uniform that indicates they are part of the ICT Service of the EUI¹;
5. know the procedures for executing the Service and the environments in which they are required to operate.

The technical support staff shall access the premises of the Institute in compliance with all relevant safety regulations and [internal rules of the Institute](#).

Access to areas where the Company's staff will be providing the technical support that is the object of this tender procedure may require special authorisation from the Institute if there are any specific security

¹ The Company can get its own uniform or use, at its own expense, the uniform proposed by the Institute.

requirements. To this end and based on its concerns, the Institute shall communicate to the Company its intention to make use of this clause without having to specify the reasons for this choice.

It is the responsibility of the Company to ensure that all staff working in the Service is aware of the rules provided for in the EUI's Internal Regulations.

The Company is also responsible for the safety of its staff, and will have to inform and train all staff, thereby releasing the Contracting Authority from all responsibility resulting from accidents occurring during the execution of the Service that is the object of this procedure.

The staff is bound by the obligation of professional secrecy not to reveal any facts or circumstances they learn of whilst carrying out their duties, in accordance with the applicable laws and the [Internal Regulation of the EUI regarding Data Protection](#).

The Company already knows that the Client's working days and holidays differ from the Italian calendar and therefore undertakes to comply with this timetable, which for 2017 has been included in **Annex M**.

The Company shall guarantee the regular provision of services under all circumstances, with the exception of events of force majeure (see **Article II.11 of Annex P - Draft Contract**).

22. Staff

The individuals selected by the Company to work in the Service must have proven abilities, they must be honest and ethical, with good and irreproachable conduct, reserved, fair and willing to cooperate with both the staff of the Contracting Authority and with the users of the Service, without discriminating against them based on gender, race, language, religion, political opinions, and personal and social conditions, which an academic and multi-cultural environment like the EUI supports.

22.1. On-site and Off-site Technical Support

The activities of the Service will be carried out by **6 (six) Full Time Equivalents (FTEs)**, on all working days of the year, excluding the holidays observed by the Institute (about 35 days, see **Annex M**), and based on their areas of service, as detailed above.

The staff must comprise at least **9 (nine)** people so that they can cover for each other in the event of sickness or vacation time or if specific technical skills are needed.

Since the staff on standby will be the same as the staff of the Service ([Article 6.1.2](#)), the numbers cited above are also valid for the Off-site Technical Support staff.

22.2. Helpdesk

The Company shall man the Helpdesk with the staff needed to manage, during the hours and under the conditions provided in [Article 17.2](#), the tickets generated by the Institute's members, guests and occasional external visitors. The critical mass has been calculated as being equal to **1,500 (one thousand five hundred) users**.

The incidence per user type can be summarised as follows:

- **Members: 95%** of the tickets
- **Guests: 4%** of the tickets
- **External visitors: 1%** of the tickets

The volume generated amounts to approximately **12,000 (twelve thousand) tickets per annum**, divided, on average, as follows:

- **Real Estate & Facilities Service (REFS): 60%** of the total
- **ICT Service (ICT): 35%** of the total
- Other administrative units (so-called **off-topic tickets**): **5%** of the total

For the sake of completeness, the statistics for 2014, 2015 and 2016 have been attached (**Annex I**).

Based on the nature of the ticket, when setting up the Helpdesk, the Company will have to consider the number of tickets that need to be dispatched to specific technical units (with an average intervention time of **<5 minutes** each) as well as those that can be resolved directly (with an average intervention time of **<15 minutes**):

- Percentage of **tickets to be dispatched: 80%**
- Percentage of **tickets to be processed: 20%**

The Service shall use **2 (two) phone lines** and voicemail if lines are busy.

At present, no detailed statistics on the number of calls are available; however, the number of requests by telephone is estimated at **10 (ten)** per business day, where 90% are **ICT** cases and the remaining **10% REFS-related** or off-topic, equal to about **2,250** phone requests per year.

22.3. Responsible Officer

The Company shall appoint a Responsible Officer to whom it shall entrust the supervision of the Service on a full time and continuous basis. His/her name and contact details (mobile number and e-mail address) shall be communicated to the Institute **in writing** at the moment the contract is signed.

The Officer selected must be an employee of the Company, s/he shall be suitably qualified for the job and have previous experience in similar roles.

To avoid any conflict of interest, the Responsible Officer shall not fill any other position in the Service.

The Responsible Officer shall check and ensure that the Service is carried out in accordance with the terms and conditions of these STS, including the annexes, and the documents submitted with the Company's bid. S/He is responsible for ensuring that the staff of the Service acts in compliance with the envisaged functions and tasks.

The Responsible Officer will be the single contact person for the tender and will be in constant contact with the EUI's offices whose task it is to ensure that the Service is functioning properly.

Any communication, including complaints of breaches or instances of non-compliance, made by the EUI to the Company's designated representative shall be deemed to be submitted directly to the Company.

In the event of the Officer's absence (due to vacation, illness, etc.), the Company shall ensure that s/he is replaced by a person approved by the EUI, and provide the latter with the replacement's name, mobile number, email and details of the replacement period.

The Responsible Officer shall communicate all information on activities performed, on problems detected and on proposed solutions solely to the EUI's Responsible Officer and Reference Person (**Articles 41 and 42** of these STS), or face specific penalties and/or disciplinary sanctions at the discretion of the Institute.

The duties of the Responsible Officer include, but are in no way limited to:

- agreeing with the EUI on the timetable for the launch of the Service;
- acquiring information about the setup and workflow of the Client;
- training, preparing and supporting the technicians who will be subsequently used to manage the Service;
- promptly informing the EUI about any absences, substitutions and/or changes to the staff members working in the Service;
- managing resource back-up (selecting resources, planning, etc.);
- ensuring the continuity of the Service and dealing with documentation;
- providing a telephone number to be used in case of off-hour incidents;
- submitting a training plan for the staff to the EUI;
- verifying the status of the Service, the relationship with the Client and organising review meetings;
- monitoring the expected service standards and planning the necessary interventions to achieve such standards;
- respecting any formal commitments envisaged in the contract and interfacing with the Management or any other representatives of the Client;
- proposing any improvements, in terms of costs, benefits, solution and risk times;
- acting diligently and cooperating to resolve any conflicts, problems or disputes that may arise during the term of the contract;
- analysing the user's degree of satisfaction;
- working to guarantee approval and achieve goals/objectives;
- providing accurate and reliable solutions for the administrative and accounting management of the contract.

22.4. Technical Supervisor

The Company reserves the right to appoint a Technical Supervisor to whom it shall temporarily entrust the technical supervision of the Service, for example during the implementation phase.

Should the Company appoint such a figurehead, the name and contact details (mobile number and email address) shall be communicated **in writing** to the Institute when the contract is signed.

The Supervisor selected must be an employee of the Company, s/he shall be suitably qualified for the job and have previous experience in similar roles (Senior Technician).

To avoid any conflict of interest, the Technical Supervisor shall not fill any other position in the Service.

The Company is obliged to notify the Contracting Authority and its own technical support staff if the Supervisor is absent or unavailable (due to vacation, illness, etc.). The Company shall ensure that s/he is replaced by a person approved by the EUI, and provide the latter with the replacement's name, mobile number, email and details of the replacement period.

The Technical Supervisor shall communicate all information on activities performed, on problems detected and on proposed solutions solely to the ICT User Support Technical Supervisor or, in his absence, the ICT User Support Coordinator, or face specific penalties and/or disciplinary sanctions at the discretion of the Institute.

The duties of the Technical Supervisor include, but are in no way limited to:

- supporting the staff of the Service with his/her IT knowledge, for example when processing new problems that have yet to be documented;
- updating the staff of the Service about new technological developments;

- providing a telephone number to be used in case of off-hour incidents.

The Client reserves the right to confirm this role on the basis of the implementation progress of the Service.

23. Staff Skills and Qualifications

The technical staff shall be highly specialised in IT (hardware, software, networks, systems, security, regulations, etc.), in light of the fact that they will have to find solutions or alternative solutions to the problems reported by users, not least by managing the emotional aspect, which is often critical in particular situations.

It is for this reason that staff must have a lot of experience and a good deal of diplomacy.

Specifically, the staff working in **Technical Support** and at the **Helpdesk**, including the **Technical Supervisor** (if appointed), but not the Responsible Officer, must have the following technological know-how:

- Excellent knowledge of hardware architectures based on Wintel and AMD processors and good working knowledge of Apple platforms (Intel and Apple Ax);
- Excellent knowledge of the following Operating Systems: MS Windows (7 and later versions), Apple Mac OS X (Yosemite and later versions) and Linux (Ubuntu);
- Excellent knowledge of mobile Operating Systems, such as Android, iOS and Windows Mobile;
- Excellent knowledge of MS Office, including Platform 365, in particular Outlook and related applications (Word, Excel, PowerPoint, etc.);
- Excellent knowledge of protocols/services, such as TCP/IP, DHCP, DNS, etc., including client configuration for wired or wireless connections on various Operating Systems;
- Basic knowledge of remote access Virtual Private Network (VPN) and of Internet Protocol Security (IPsec);
- Basic knowledge of Active Directory (OU, Computers, Users, Groups, join computers to a domain, etc.);
- Basic knowledge of Microsoft SCCM;
- Basic knowledge of authentication and authorisation services/protocols, Remote Authentication Dial-in User Service (RADIUS) and Lightweight Directory Access Protocol (LDAP);
- Basic knowledge of authentication protocols and data encryption, Wi-Fi Protected Access II Enterprise (WPA2);
- Basic knowledge of Voice over IP (VoIP) communication.

Staff shall also possess:

- **Five years of experience** in IT support (detailed in the CV);
- **ITIL Certificate** (at least **Foundation Level**) for **technical support staff** and **Technical Supervisor** (if appointed) or commitment to obtaining the certificate (see **Article 6.2**);
- **English** and **Italian** equal to or better than the following levels (according to the Common European Framework of Reference for Languages - CEF, QCER/CEFR):
 - **B2** for the **Technical Support** and **Helpdesk** staff;
 - **IMPROVEMENT FEATURE 04: C1 for the Helpdesk staff.**
- A **driving licence, Category B** or higher, with validity in Italy.

Staff shall also have:

- a proactive, innovative approach to finding solutions;
- skills to understand and use new technologies;
- skills to create technical documentation (such as knowledge bases, flow diagrams, processes, etc.);
- skills to test hardware and software;
- skills to make decisions in critical and unstable situations;
- skills to work under pressure and direct supervision;
- skills to relate to users at different levels;
- orientation skills, service culture and team spirit;
- analytical skills and logic.

The **Responsible Officer** shall possess:

- leadership and managerial skills;
- skills for the management of complex projects (provide details in CV).

The following qualifications are considered optional, but will be taken into consideration in the evaluation that assigns points to candidates during the scoring procedure:

- Secondary school diploma from a technical and ICT institution;
- A specialist or Master's university degree in technical and ICT disciplines;
- Knowledge of other foreign languages among French, German and/or Spanish (as attested by the relevant certificates);
- Professional certificates in the technological areas requested (like Microsoft MOC, Apple Certification of Proficiency, etc.).

24. Staff Selection Process

In order to evaluate accurately the technical and language skills of the staff providing the Service, including the Technical Supervisor (if appointed), the Competitors shall propose:

- a. for **technical support** staff, at least **9 (nine) candidates** in possession of the documentation cited below;
- b. for the **Helpdesk** staff, **at least 2 (two) candidates** in possession of the documentation cited below;
- c. for the **Technical Supervisor**, if proposed, **at least 1 (one) candidate** in possession of the documentation cited below.

The Competitor will have to submit **at least** the following documentation for each of the candidates (including the Technical Supervisor and the Responsible Officer):

- 1) Name and surname of the person, Place of residence/address;
- 2) Curriculum Vitae (based on [EuroPass](#) template);
- 3) Type of employment contract with the Company;
- 4) Proposed Role (Site Officer, Helpdesk Operator, Supervisor);
- 5) Professional experience;
- 6) Professional certifications in the pertinent technological areas;
- 7) Type and category of Driving Licence (only for technical support staff).

All of this information shall be clearly provided in the Technical Report, in a specific chapter describing the staff members who will be involved in providing the services that are the object of these STS. In this specific chapter, Tenderers may include the staff members' CVs and their qualifications (Diplomas, Degrees, Certifications, etc.), and any other document that may be useful in providing relevant information regarding the Tenderer's candidates' qualifications.

Some of this information shall also be included in **Annex O (Candidates' Evaluation Form)**.

Together with the Technical Offer (**Annex E**), this document contributes to the basic information required in order to determine whether the Tenderer has complied with the **minimum threshold of technical admissibility** ([Article 36.2](#)).

The candidates will have to undergo interviews and/or written and practical tests to ascertain whether or not they possess the requirements detailed in the Technical Report and the language skills ([Article 23](#)) needed to perform their duties.

The exact dates of the interviews shall be agreed upon with the Competitors after the envelopes are opened. The time frame envisaged for the interviews is indicated in [Article 37](#).

25. Staff Training

In order to ensure that the Service meets the quality standards required by the Contracting Authority, the Company shall plan to hold training sessions and updates for all its staff members that are involved in providing the services that are the object of this tender.

The Tenderer shall include in its Technical Report a chapter describing in detail its plan for training courses for its staff. This training activity, as described in the Technical Report, shall take place during the entire period of the contract.

The Company is also obliged to inform the Contracting Authority, on an annual basis, of any updates and/or modifications to the training program and the training courses completed by the staff.

The Institute reserves the right, for the duration of the contract, to ask the Company to confirm the training program and training completed by the staff.

Part IV – PREMISES, EQUIPMENT AND UTILITIES

26. Premises

The Institute shall hand over to the Company, for the entire duration of the contract, suitable premises, including furnishings, for the performance of the Service on site; the Company undertakes to preserve said premises in perfect condition.

In the event of damage occurring to the premises, to furnishings, to utilities and to equipment during the lifetime of the contract, and should such damage be attributable to inexperience, negligence or insufficient maintenance, the Company shall be charged entirely for all damage compensation. In such an event, the Institute shall enforce and take possession of the performance bond as envisaged in [Article 39](#) of these STS.

The Company, on its own behalf and on behalf of any of its heirs for any reason, shall be irrevocably obliged, from this moment onward and throughout the duration of the contract, never to change, on penalty of termination of the contract, for any reason or motive, the intended use of the premises it has been entrusted with, unless the Institute issues a provision to the contrary, and in any case always observing any limitation the Institute shall establish.

27. Equipment

Once the contract has expired, or in the event that the contract is terminated, the Company shall withdraw every item of equipment that it has supplied, undertaking to implement responsibly any necessary measure including, by way of example, but not limited to, correct procedures for the pick-up, disposal of packaging materials, transportation and portage.

In no case whatsoever is the Institute obliged to purchase the equipment provided and/or installed by the Company.

Unless the Institute specifically requests otherwise, the Company shall, at its own expense, provide for the removal of every piece of equipment no later than **30 (thirty)** consecutive days after the expiry of the contract.

28. Utilities

For the duration of the Contract, the EUI shall provide, at its own expense, the following:

- Electricity for on-site services;
- Network and power outlets for on-line services;
- Internal telephone extension and telephone quotas for the on-site technical service;
- A phone line for the Helpdesk;
- IT accounts and electronic mailboxes (only for technical support team and Helpdesk staff);
- Access to support tools (ITSM, SCCM, etc.);
- Access to the premises (only for technical support team);
- EUI ID Cards (only for technical support team).

CHAPTER III – SUBMISSION AND EVALUATION OF OFFERS

29. Procedures for Submitting an Offer

In order to be able to draw up an accurate technical offer to be submitted, all Tenderers must inspect the EUI's premises and IT infrastructure elements that are relevant to the object of this tender procedure. Tenderers shall submit their request to visit the premises by sending **Annex D** by email to ICTS.Tender1-17@EUI.eu later than **3 pm** on the day shown in **Table 7 (Article 37)** under the heading “**deadline for submission of Site Inspection requests**”.

The Offers and all attached documentation, including annexes, shall be submitted in Italian or in English. Both the Technical Offer 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) - ITALY

The entire documentation for the bid shall be sent in a perfectly sealed package, on pain of exclusion from the tender procedure. The package must be sent exclusively via express courier 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), in either case with **delivery** to the Institute no later than **3 pm** on **12.05.2017** (absolute deadline). Any other means of delivery and/or shipment shall warrant exclusion from the tender procedure.

All Tenderers are required to notify the EUI that they have submitted a bid, by writing to the email address ICTS.Tender1-17@EUI.eu. The Institute shall acknowledge receipt of this message.

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

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

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

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

- The code referring to this tender procedure: **CFT-EUI-ICTS-2017-001**;
- The title: **Open Call for Tenders for the Supply of IT Technical Support Services to End Users of the European University Institute**;
- The **name of the Tenderer**;
- The **name and address of the Institute** (see above).

The **inner envelope** shall bear the indication of the Service in charge of the tender as given in these STS, and the wording “**Bando di gara — Non deve essere aperto dal servizio postale interno**” (or, in English, “**Tender**”).

Procedure – Not to be opened by the internal mail service”). If the Tenderer is using self-sealing envelopes, they must be sealed with adhesive tape and the sender must sign across that tape.

The content of the package must be subdivided into **4 (four) envelopes**, according to the following instructions, on pain of exclusion from the tender procedure.

29.1. Administrative Documents (ENVELOPE no. 1)

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 (one)** original and **1 (one)** paper copy (clearly distinguishable from the original, and **neither stapled nor bound** to enable easy photocopying), as well as a read-only digital copy (i.e. that cannot be edited), of the following documents:

1. **Checklist**, filled in and signed (**Annex A**).
2. **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**.
3. **Request to participate to the compulsory site inspection (Annex D)**, dated and signed by the company's Legal Representative, or by a person entitled to sign on behalf of the company as well as the **Site Inspection Attendance** signed by the EUI reference person.
4. **Declaration on Honour** concerning the Company's legal status, signed by the company's Legal Representative, using **Annex C**.

In the case of a 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.

5. Qualifications, documents and certificates required to prove that the Company is in possession of all **General requirements** as stated in [Article 35.1](#).
6. Qualifications, documents and certificates required to prove that the Company is in possession of all **Technical, Economic and Financial Capacity requirements** as stated in [Article 35.2](#).
7. Copies of the **Invitation to Tender Letter**, of the **Special Tender Specifications** and of the **Draft Contract**, without any additions, amendments 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.
8. 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.

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.

9. **A provisional bid bond** for 2% of the presumed amount of the tender, or **€29,000.00 (twenty nine thousand/00)**.

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.

10. **Declaration that the Tenderer has participated in the Site Inspection.** Such a declaration will be issued by the Contracting Authority's reference person at the end of the site inspection. Tenderers who have not participated in the site inspection will be automatically excluded from the tender procedure;
11. For tenderers with office registered in Italy: **self-certification that the Tenderer is in compliance with anti-Mafia provisions**; for international Tenderers: **self-certification of equivalent international certificates**.

All digital documents shall be in Portable Document Format (.PDF), of type Searchable PDF/PDF-A.

29.2. Technical Offer (ENVELOPE no. 2)

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 (one)** original and **1 (one)** paper copy (clearly distinguishable from the original, and **neither stapled nor bound** to enable easy photocopying), as well as a read-only digital copy (i.e. that cannot be edited), of the following documentation:

1. **Technical-organizational report** of the service requested;
2. **CVs** of the candidates;
3. Overall summing up documents in **Annex E** and **O**.

All digital documents shall be in Portable Document Format (.PDF), of type Searchable PDF/PDF-A.

In evaluating the Technical Offer, special consideration will be given to the level of detail, to the clarity and accuracy of the description provided in the technical report and the method used in describing the organization of the services requested in these STS, as well as to the proposed candidates' profiles.

The report shall not be longer than **50 (fifty) pages, A4 format**, clearly describing every element useful to evaluate the project. The report must be such as to make it easy to identify and evaluate the technical-organizational, operational, qualitative, methodological characteristics, as well as the additional features and/or improvements proposed over and above the specifications in the STS; **these must be described in a specific section**. Furthermore, the report shall include the list of **equipment** for the technical staff.

The report shall introduce and elaborate on the following topics, **on pain of exclusion**:

- a. Validity of the Tenderer (A1): presentation of the Company; references; list and description of similar service contracts (in terms of absolute value and service workstations), specifying time, place, and duration and indicating the name of a reference person for each contract listed; valid or in progress **certifications; contingency plan**; etc.;
- b. Provision of the Services (A2): detailed description of each service covered by these STS (one chapter/paragraph per service), the technical-organisational, operational, qualitative and methodological features and how each will be performed; description of the technological infrastructure used, any additional charges relating to integration with the Contracting Authority's infrastructure, the Transition Plan, etc.;
- c. Staff (A3 + A4): presentation of the team proposed for carrying out the activities required by the STS: each member's CV must be submitted, attesting to their professional qualification and linguistic certification; in addition, description of how staff absences will be handled, including potential emergency situations (e.g. strikes, prolonged absence, unexpected resignation, dissatisfaction on the part of the Contracting Authority, etc.), and description of the management of uniforms, of governance, of the sharing and transfer of know-how, etc., must be elaborated;
- d. Training Plan (A6): description of the plan for training and updating the staff involved in the service, including how the Institute will be able to verify such training;
- e. Plan for Monitoring and Quality Control (A7): details about how the Company intends to monitor and guarantee quality control of the services carried out;
- f. Reporting (A7): detailed description of the reporting (type, format, usability, how to retrieve reports, possible integration with databases, etc.) necessary for monitoring and evaluating every activity of the contracted service (KPI, etc.);
- g. Equipment (A8): description of the equipment furnished to the on-site and on-call technical staff and any plan for keeping such equipment up to date; indication of the voice/data phone plan, etc.;
- h. Proposed Additions and Improvements (A9): description of the improvement features accepted and any additional service benefitting the Contracting Authority or the quality of the services delivered.

The Technical Offer shall be signed by the company's Legal Representative, **on pain of exclusion from the tender procedure.**

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

29.3. Economic Offer (ENVELOPE n. 3)

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 (one)** original and **1 (one)** paper copy (clearly distinguishable from the original, and **neither stapled nor bound** to enable easy photocopying), as well as a read-only digital copy (i.e. that cannot be edited), of the Economic Offer drawn up using the form in **Annex F** and signed by the company's Legal Representative.

The Economic Offer shall consist in a proposed price for each individual item in **Annex F – Economic Offer Form** for all Services summed up in [Article 6.1](#). All prices shall be net prices, excluding VAT.

Each Economic Offer submitted shall be assessed in a comparative evaluation with all other Offers received. Scores shall be assigned according to the detailed scoring criteria described in [Article 36.3](#).

29.4. Further Documentation (ENVELOPE no. 4)

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 DOCUMENTATION**"; this envelope shall contain any other document, preferably a read-only digital copy (i.e. that cannot be edited), 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.).

30. Further Information concerning the Submission of Offers

All the documentation explaining the procedure for participating in this tender can be accessed by anyone interested at: www.eui.eu/About/Tenders.aspx.

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 by email to ICTS.Tender1-17@EUI.eu and sent no later than **3 pm on [XX.XX.20XX]**. Any query or request for clarification received within this deadline will be answered: queries and replies will be posted, without identifying the sender, on the EUI Tenders webpage (see above).

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.

No remuneration or reimbursement shall be due to tenderers for having drawn up their bid, for having elaborated projects or for having supplied any other documentation as part of their bids.

None of the documentation submitted for the tender procedure will be returned, not even that pertaining to bids that were not awarded the contract.

The name of the Tenderer who is awarded the contract shall be published on the Institute's website. After that, all the companies participating in the tender procedure will be notified of the results.

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.

Neither the award of the tender, nor the invitation to participate in the procedure, imply an obligation upon the Institute to sign the contract.

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 he may have gained and the Institute shall enforce and 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.

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.

31. Compulsory Site Inspection

All companies interested in submitting a bid for this tender procedure shall take part in the visit to survey the premises and facilities where the services that are the object of this tender shall be implemented. The Site Inspection is compulsory, **on pain of exclusion**. The Site Inspection will allow tenderers to gain a more accurate understanding of the premises, so they can draw up a project that is as close as possible to the actual needs.

A maximum of two participants per Company are allowed: the Owner or the Legal Representative of each tenderer is invited to attend the Site Inspection; tenderers may appoint a delegate instead, and in that case the delegate shall carry a valid ID, the proxy form signed by the company's Legal Representative, as well as a photocopy of the latter's valid ID.

In full observance of the principles of equal treatment and uniform information, the Site Inspection shall take place on **23.06.2017**, meeting arranged for **10.00 am** at the **Badia Fiesolana, Via dei Roccettini, 9, San Domenico di Fiesole (FI) - ITALY**. All tenderers shall submit to the EUI's ICT Service their Request for the Site Inspection, using the form in **Annex D** of these STS, including a copy of the proxy form, if they plan to issue one. Said request must be sent by email to ICTS.Tender1-17@EUI.eu, no later than **12 noon** on **19.06.2017**, **on pain of exclusion** from the tender procedure. The original of the request shall be handed over to the Institute's accompanying person on the day of the Site Inspection.

At the end of the Site Inspection the Contracting Authority's reference person shall issue to tenderers a certification (Site Inspection Attendance) that they have taken part in the site inspection, which must then be included in the Administrative Documentation (Envelope no. 1) to be submitted in the tender procedure, together with a copy of the Request, on pain of exclusion from the tender.

Since the Company that is awarded the contract shall thus have had the opportunity to become familiar with the premises and facilities involved, it thereby undertakes to implement services that fully meet the quality, operational and functional requirements as described in these STS, with the sole exception of any improvements that it may include in its bid.

32. Opening of Offers

The opening of the Offers shall ascertain that:

- offers were submitted within the established deadline;

- offers submitted were presented in the form requested, using the “method of the double sealed envelope” (as specified in [Article 29](#)).

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

33. Grounds for Exclusion

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

- a) in a state of bankruptcy, of being wound up, in receivership, having entered into an arrangement with creditors, having suspended business activities, or in any other similar situation due to a procedure of this nature envisaged by national laws or regulations, nor shall they be the object of a complaint that might give rise to similar procedures;
- b) to have been found guilty, in a final judgment, for an offence related to professional ethics, by the competent judicial authority or in the ruling of an administrative body or international organization;
- c) to not be fully in compliance with the obligations relating to the payment of social security and insurance contributions, or to the payment of duties and taxes in observance of the legislation of the country where the tenderer is legally registered or in Italy, where the services for the Institute would be implemented. An infringement of this nature must be proved by a ruling or an administrative decision, confirmed in a final judgment, in compliance with the legislation of the country where the tenderer is registered for tax purposes, or in Italy, being the country of establishment of the Institute;
- d) to have been found guilty, in a final judgment, of fraud, corruption, participation in the activities of a criminal organization, money laundering, crimes related to terrorism, child labour or other forms of human trafficking or any other illicit activity detrimental to the financial interests of the Institute;
- e) to have been found in serious breach of a contract financed by the Institute, or to have been found guilty, in a final judgment, of offences or serious irregularities, as ruled by the competent judicial authority or by an administrative decision;
- f) to have been the subject of an administrative penalty for having committed an offence related to professional ethics, for having made substantial errors or committed irregularities or fraud, or have been declared to be in serious breach of their obligations under contracts covered by the Institute’s budget ([Article 41 of President’s Decision no. 36/2016](#)).

With the exception of cases falling under item d) above, the Institute may decide not to exclude the tenderer in the event that the latter can provide evidence of having already implemented new procedures to demonstrate its reliability.

The Institute may also waive the compulsory exclusion in cases falling under item c), in instances where an exclusion would be clearly disproportionate, i.e. where the amount of social security or insurance or taxes or duties due was negligible, or in cases when the tenderer was informed of the amount due, as a consequence of its non-compliance, with such short notice that it was not able to pay and demonstrate its reliability before the deadline for the submission of the documentation for participation in this tender procedure.

Furthermore, tenderers in the following situations at the time of this procedure shall also be excluded:

- g) in a situation of conflict of interest in relation to the contract. Such situations occur when the impartial and objective implementation of the Contract is jeopardized for reasons related to financial interests, to political or national affinities, to family ties or sentimental ties, or for any other shared interest in the present and in the previous 5 years;

- h) of not having immediately notified the Institute of any situation which may suggest a conflict of interest, or which may give rise to such a conflict;
- i) of having granted to third parties, or having obtained, sought, tried to obtain or accepted from third parties, whoever that may be, benefits in money or in kind, if such an advantage is an illicit practice or may be construed as corruption, direct or indirect, connected to the implementation of the Contract;
- j) of having tried to exercise undue influence on the Institute's decision-making process or to obtain confidential information that would have placed it at an advantage in this tender procedure;
- k) of having tried to enter into an agreement, or actually done so, with other tenderers in order to distort the tender procedure;
- l) of having tried deliberately to provide misleading information that may have substantially influenced decisions relating to exclusion, selection and awarding of the tender;
- m) of having deliberately provided misleading information that may have substantially influenced decisions relating to exclusion, selection and awarding of the tender;
- n) of having provided the Institute with inaccurate and/or incomplete and/or false information in the context of this tender procedure.

Tenderers shall prove that they are not in any of the above situations.

34. Documents Proving Eligibility in Relation to the Grounds for Exclusion

The Contracting Authority will accept, as satisfactory proof that the tenderer is not in any of the situations described in [Article 33](#) above, a formal signed Declaration on Honour, as shown in the form in **Annex C**.

The Institute reserves the right to verify the accuracy of this information and to request documents providing further evidence before the contract is signed.

35. Selection Criteria

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**.

35.1. General Requirements

The following documents shall be submitted with the Technical Offer (envelope no. 2):

- a) Enrolment in the CCIAA (Chamber of Commerce, Industry, Arts and Crafts, Agriculture), or in an equivalent registry in the country where the company is established, showing that it practices business activities in the field that is the object of this tender procedure, or at least a field that is compatible with it.
- b) For tenderers with office registered in Italy: self-certification that the Tenderer is in compliance with anti-Mafia provisions (the Institute reserves the right to request the competent Prefecture to issue the related anti-Mafia certificate); for international Tenderers: self-certification of equivalent international certificates;
- c) Declaration that the Tenderer has taken note of all general, particular and local circumstances, barring none, and of any other element which may directly or indirectly influence the implementation of the service or the drawing up of the Offer; and therefore that the Offer submitted 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 the bid. For this purpose it is obligatory, on pain of exclusion from the tender procedure, to enclose with the aforesaid declaration an **Economic Feasibility Plan** for the service proposed, that is, an analysis of the total yearly costs, which must necessarily take into account the following items:

number of staff members per grade, overall hours worked per grade, hourly cost of labour, national labour contract applied, safety costs related to the Company's activity, direct and indirect overheads (e.g. equipment, uniforms, voice/data tariff schemes for service cell phones, Helpdesk telephone costs, etc.), and company profits.

- d) Declaration of being in compliance with the provisions aimed at legalizing the position of undeclared employees (Individual Legalization Plans - Piani Individuali di Emersione).
- e) Declaration of being 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 that it applies the employment conditions envisaged in the sector's national collective labour agreement.
- f) Declaration of being in compliance with the labour regulations governing the right to work of persons with disabilities.
- g) Any and all useful documentation to prove that the company is fully up to date with all due social security and insurance contributions (e.g., through a DURC certificate), according to existing legislation.

35.2. Technical, Economic and Financial Capacity Requirements

- h) To be in possession of valid **UNI EN ISO 9001** certification.
- i) **2 (two)** bank references issued by prime banks, or financial companies included in the registers of authorized brokers, issued after the date of the Invitation to tender and the publication of these STS, proving that the company has always met its obligations punctually and regularly, and that the Company possesses the economic and financial capacity to perform the services that are the object of this tender.
- j) Certificates for the following insurance policies, valid for the entire duration of the contract, and complying with the ceilings as follows:
 - i. Civil Liability insurance: with a ceiling of at least **€5 million (five million)**
 - ii. Civil Liability Insurance for Service Provider: with a ceiling of at least **€5 million (five million)**
- k) Audited accounts for the last three years, or fewer if the company has not been in activity for three years, for any tenderer wishing to take part in this tender procedure.
- l) Declaration of the company's turnover, of its profit and loss account for the last year of activity (or part of the year, if it has not been in activity long enough) and a Financial Statement for the end of the accounting period, in cases where this information has not already been provided under **item (k)**.
- m) In the event that the company is unable to provide the documentation called for under **item (l)**, the company shall submit a declaration of its turnover forecast, as well as its forecast of profits and losses, of cash flow for the year and a letter from the company's bank outlining its existing cash and credit situation.
- n) Declaration that, over the previous three years (**2014-2015-2016**), the company's overall turnover, excluding VAT, was not lower than **€870,000.00 (eight hundred seventy thousand)**.
- o) Declaration that the company is currently executing and/or has executed over the previous three-year period (**2014-2015-2016**) similar or identical services to those that are the object of this tender procedure, indicating, for each of these services, **client, duration, contract amount, and type of service**.

Among the services performed over the previous three years (**2014-2015-2016**), the company must be able to include at least 1 contract that was successfully executed, or that is currently in execution, for an amount of at least **€478,500.00 (four hundred seventy eight thousand five**

hundred), excluding VAT, for the overall period of the 3 years taken into account and displaying the same characteristics as the one that is the object of this tender procedure.

In the case of successfully completed services, the company shall produce the certificate of final completion issued by its public or private client.

In the case of a TGC and/or a Consortium, requirements from **item (a)** through **(m)** must be met by each of the companies that is part of the Temporary Grouping or of the Consortium.

On the contrary, the verification of requirements listed under **items (n)** and **(o)** will be performed considering the TGC and/or consortium as a single entity. Therefore, these requirements may be met by a single company or by each of the companies that are members of the TGC or the Consortium.

The Institute reserves the right to carry out sample checks to ascertain the truthfulness of tenderers' declarations.

36. Award Criteria

Only those Offers that meet all the requirements listed in [Article 35](#) shall be eligible for the next stage of the procedure, the technical and qualitative evaluation.

The Contract shall be awarded according to the principle of the “**Best Value for Money**”, based on the internal Evaluation Committee's assessment: out of a maximum score of **100**, each Offer shall be awarded points according to the following parameters:

MAXIMUM SCORE	
Technical and Quality Evaluation, Q	65/100
Economic Evaluation, P	35/100

The Offer's Total Score **T** shall be made up of the sum of its Technical and Quality Score **Q** and its Economic Score **P**:

Total Score T = technical and quality evaluation Q + economic evaluation P

The Tenderer whose Offer obtains the highest Total Score T shall be awarded the tender.

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 is also subject to a comparative analysis among all the offers submitted, the Committee shall assign a score at its own discretion, providing motivations for its evaluation.

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

36.1. Assigning Points for Methodological, Technical and Qualitative Aspects of the Service

In evaluating the methodological, technical and qualitative aspects of the service, as well as the technical skills and language proficiency of the candidates, the Committee shall use the scores shown in **Table 6**, where the highest achievable score is **65**.

For each item (from **A1** to **A9**), the Evaluation Committee shall assign at its own discretion a score anywhere between 0 and the highest score shown in the Table, on the basis of the Offer's compliance with the specifications in these STS.

In order to assign scores for the Support service staff, each candidate will be interviewed so as to evaluate her/his skills as required in [Article 23](#). Interviews with candidates shall assess their technical and IT skills, as well as their language proficiency, as presented in their CVs (**Annex O**).

METHODOLOGICAL, TECHNICAL AND QUALITATIVE ASPECTS				
DESCRIPTION			MIN. SCORE	MAX. SCORE
A1	COMPANY: EXISTING CONTRACTS, REFERENCES, CERTIFICATIONS, CONTINGENCY PLAN, ETC.		3	5
A2	EXECUTION OF THE SERVICES:			
	A2.1	ON SITE SUPPORT	5	7
	A2.2	OFF SITE SUPPORT	1	3
	A2.3	HELPDESK SERVICE	5	7
A3	STAFF SKILLS AND QUALIFICATIONS			
	A3.1	TECHNICAL SKILLS	3	5
	A3.2	WORK EXPERIENCE	3	4
	A3.3	EDUCATION AND CERTIFICATIONS	0	2
A4	INTERVIEW AND TESTS:			
	A4.1	INTERVIEW AND SKILLS	3	5
	A4.2	ENGLISH AND ITALIAN LANGUAGE SKILLS	3	5
A5	STAFF ORGANISATION, MANAGEMENT OF ABSENCES AND EMERGENCIES		3	5
A6	STAFF TRAINING		1	2
A7	MONITORING, REPORTS AND QUALITY CONTROL		3	5
A8	EQUIPMENT FOR THE TECHNICAL SUPPORT STAFF		2	5
A9	PROPOSED ADDITIONS AND IMPROVEMENTS		0	5
			35	65

Table 6 – Scores for Methodological, Technical and Qualitative Aspects

36.2. Minimum Threshold of Technical Admissibility

The minimum threshold of technical admissibility for admission to the next (economic) stage is:

- each item from **A1** to **A9** must reach the Minimum Score, as shown in the Table 6;
- total score for all items from **A1** to **A9** must be between 35 and 65.

Tenderers whose Technical Offers meet the two conditions specified above shall be put through to the next stage, where their Economic Offers will be evaluated.

36.3. Assigning Points in Relation to Price Offered

The maximum score achievable for the price **P** is **35 points**, subdivided according to the following **weightings**:

- P1, Cost of *On-Site Technical Support Service*: max. **10 points**
- P2, *Hourly Rates for Off-hour Interventions*: max. **2 points**
- P3, *Compensation Coefficient*: max. **2 points**
- P4, Cost of *Helpdesk Service*: max. **10 points**
- P5, Cost of *Optional On-site Helpdesk Service*: max. **5 points**
- P6, Cost of *Off Hours Helpdesk Service*: max. **2 points**
- P7, Cost of *Surcharge for Single User*: max. **2 points**
- P8, Cost of *Extension to 300 Users*: max. **2 points**

Price **P6** to be weighted will be the average of the cost of the *Off-site Off-hours Helpdesk Service* (**P6a** in **Annex F**) and the cost of the *On-site Off-hours Helpdesk Service* (**P6b** in **Annex F**):

$$P6 = \frac{P6a + P6b}{2}$$

The scores P1, P2, P3, P4, P5, P6, P7 and P8 will therefore be calculated on the basis of the above weighting factors by means of the following formula:

$$P_i = \text{Weighting factor} \times \frac{\text{Minimum Price}}{\text{Price Offered}}$$

The final score **P** for each tenderer shall be determined by summing the **P_i** scores according to the formula:

$$P = P1 + P2 + P3 + P4 + P5 + P6 + P7 + P8$$

37. Indicative Timeline of the Tender Procedure

The indicative timeline for this tender procedure is summed up in **Table 7**:

INDICATIVE TIMELINE OF THE TENDER PROCEDURE	
DESCRIPTION	DATE
Launch of the tender procedure	12 June 2017
Deadline for Submission of Site Inspection Requests	19 June 2017, at 12 noon
Site Inspection	23 June 2017, 10 am to 5 pm
Deadline for Submission of Queries or Clarification Requests	5 July 2017, 3 pm
Deadline for Submission of Offers	12 July 2017, 3 pm
Candidates' Interviews and Language Tests	17-18-19 July 2017 9 am to 18 pm
Announcement of Results	by 4 August 2017
Practical demonstration	starting from 22 August 2017
Signing of Contract	Not less than 14 days after announcement of results

Table 7 - Indicative Timeline of the Tender Procedure

38. Obligations in order to Finalize the Tender Award

In order for the Tender Award to become definitive, the successful Company shall provide a practical demonstration of how it plans to perform the services that are the object of the tender.

As far as the Helpdesk service is concerned, the Company shall arrange for a simulation on premises provided by the EUI, in which it shall demonstrate and put to the test the organizational plan and services proposed in its bid, showing that the system matches the description and the specifications in these STS.

In the event that such a demonstration is not deemed in full compliance with the descriptions made in the bid submitted, the Contracting Authority reserves the right to withdraw its award and to award the tender instead to the company that achieved the next highest score, or alternatively to launch a new tender procedure, holding the defaulting company liable for any increase in cost that the Institute may incur as a consequence. Under these circumstances, the Institute shall take possession of the defaulting company's bid bond and shall also apply any further penalty envisaged by the existing legislation.

39. Obligations after being Awarded the Tender

In order to be effectively awarded the tender and to become eligible to sign the contract, by the date decided by the Contracting Authority, the successful Company shall submit the following:

1. 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 P**);
2. **only for TGCs**: its articles of association with a mandate conferred upon the Legal Representative of the lead company by the participating companies, in a private deed certified by a notary public.

If the Company that is awarded the tender does not comply in a timely fashion with the above obligations or fails to 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

submitted in its 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 defaulting company liable for any increase in cost that 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 be effectively awarded the tender and will be formally invited to sign the contract.

CHAPTER IV – FINAL PROVISIONS

40. General Information

The tender procedure shall be performed in compliance with the Institute's internal regulations, and especially in accordance with [High Council Decision no. 6/2015](#) amending Title V of the EUI's Financial Rules regarding Public Procurement and with [President's Decision no. 36/2016](#), both available on the Institute's website at <http://www.eui.eu/About/Tenders/Index.aspx>.

Participation in this tender procedure implies full acceptance of the above-mentioned regulations.

The rules governing the future relationship between the Contracting Authority and the Company that is awarded the tender, including payment terms, data protection and processing, dispute settlement mechanisms, both during the tender procedure and in the implementation of contractual obligations, are all contained in the Draft Contract in **Annex P**.

41. Responsible Officer of the Contracting Authority

The Contracting Authority appoints the Director of the European University Institute's ICT Service as the Responsible Officer for the tender procedure.

The Responsible Officer 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 all contractual obligations are observed, enacting coercive provisions and applying penalties whenever necessary.

42. Reference Person for the Contract of the Contracting Authority

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 *ICT Service Contract Manager* shall be the Reference Person for the Contract. Among other tasks, the Reference Person shall:

- act as contact person for all operational exchanges with the Company;
- submit all requests for support and intervention whenever changes and/or new provisions are needed, throughout the duration of the contract;
- oversee the correct performance of the service and verify the results;
- where necessary, and on the basis of serious and proven motives, demand that a member of the Company's staff be removed from the premises and replaced;
- propose to the Responsible Officer, see [Article 41](#) above, the application of penalties and, if necessary, the termination of the contract;
- check all invoices issued by the Company, initialling them in approval.

43. Transition Plan

Within **6 (six) months** from the signature of the contract, the Company shall provide a detailed plan describing how it intends to manage the transition process, once the contract expires, with the handover of service activities from the Company to the Contracting Authority or to a new Contractor. This plan shall include instructions for transfer of knowledge, especially the documentation relating to the entire infrastructure and procedures. **This plan shall be updated every six months.**

44. Final Provisions and Annexes

These Special Tender Specifications consist of **44 Articles**, **60 Pages** and **16 Annexes (A-P)**, 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
- C. Declaration on Honour Concerning Legal Status
- D. Request to Participate in Compulsory Site Inspection
- E. Technical Offer Form
- F. Economic Offer Form
- G. Minimum Requirements of the Equipment for the Technical Support Staff
- H. Users as of June 1 2017
- I. Helpdesk Ticket Stats
- J. Phone Call Stats
- K. Priority Levels
- L. Service Levels
- M. EUI Holidays 2017
- N. Library Opening Hours, Academic Year 2016-'17
- O. Candidate Evaluation Form
- P. Draft Contract

Signature of Legal Representative

Company's stamp