

DOCUMENT II : SPECIFICATIONS RELATED TO THE REQUEST FOR PROPOSAL

Specifications related to the Request For Proposal for the creation of a new web-site and intranet for the European University Institute.

- Lot 1. The elaboration of a new graphical identity for the future web-site.
- Lot 2. The setting up and configuration of a Web Content Management System for the renovation of the web site and intranet.

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The first part of this document details the [tasks the contractor has to complete](#) for the successful realization of each Lot. For each task we provide information on the expected deliverables and tasks' acceptance criteria.

The second part of the document describes – for each Lot - the [content of the offers to be submitted by candidates](#).

The third part of this document specifies [financial and contractual terms](#) and the last part of the contract details the [award criteria](#) that will be used to assess and select the best offers .

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Part I DESCRIPTIONS OF THE TASKS

I.1 BACKGROUND

The European University Institute (EUI) was created by the founding Member States of the European Communities and began its activities in 1976. Today, thirty years later, it has one of the world's largest doctoral and post-doctoral programmes in the social sciences and its alumni hold leading academic and professional positions throughout Europe and internationally

The high quality of the research and teaching programmes at the EUI can be attributed to the policy of recruiting the finest scholars from Europe and beyond. The extensive visitors' programmes attract leading academics and policy-makers to Florence to participate in conferences, symposia and workshops, open to all members of the Institute.

Today, more than 800 professors, postdoctoral fellows and doctoral research students recruited from over 30 nations work together in a dynamic multicultural and comparative environment to pursue European goals in an international environment.

The European University Institute offers as well a wide range of post-doctoral training facilities in Europe. Two different options are available:

- The Jean Monnet Fellowship Programme at the Robert Schuman Centre for Advanced Studies (RSCAS) with its emphasis on research is open to junior scholars at an early stage of their careers
- The Max Weber Fellowship Programme for junior postdocs embarking on an academic career and who wish to consolidate their teaching and professional skills.

The web-site (including intranet) is an essential daily working & communication tool at the EUI, and crucial for communicating with the wider academic community.

I.2 GENERAL OBJECTIVES OF THE PROJECT

The main objectives of this project are:

- Restructure the European University Institute's web-site and intranet to make the editing of content and management easier. This implies the transition from the current, almost completely static web-site and intranet to sites managed through a Content Management System (CMS)-driven web-site.
- Improve the European University Institute's visibility on the Internet in line with the Institute's image.
- Review the web-site's graphical identity so as to better represent the European University Institute's corporate identity.

- Promote the Institute as a European centre of excellence in teaching and supervision by providing online collaboration tools to the academic community both inside and outside the Institute so as to collaborate on projects together, participate in discussions, prepare seminars and so forth.

I.3 RATIONALE

❖ About renewing the Institute's Web-site and Intranet

At the moment the Institute's web-site and intranet pages are edited using Dreamweaver. As the editing process using this tool often requires IT knowledge we currently experience bottle-necks and high workload for the Institute's web masters and for the Computing Service (CS).

To improve the current situation we would like to provide a user-friendly tool enabling Institute's members to edit themselves the web-site and that would also enable us to automate publication of some content, to speed up the publications process and decrease the workload of our members.

In 2006, extensive research has been carried out on the content, information architecture and general layout of the web-site through user tests, questionnaires and interviews. This study highlighted that it was not easy for users to find the information they were looking for. Based on the comments received and the results of the study, the Institute's members agreed a new information architecture and established design guidelines in order to improve web-site's findability and usability.

The renewal of our web-site and intranet using a Web Content Management system (WCMS) will enable us to set up this new information structure and make later structure changes easier (flexible structure). Thanks to a WCMS the new web-site structure will also enable our visitors to access information in a number of different ways depending on their interests and relationship with the Institute.

❖ Becoming more visible

It is important for the Institute to be more visible on the Web and furthermore to increase the web-site's visitor numbers, receive more online applications and boost interest in the research activities and programmes.

Optimal findability of the web-site and its content will be ensured by the future Content Management System(WCMS) by providing content optimised for search engines also through a more user-oriented navigation structure.

❖ About the new graphical identity

The Institute's web-site look and style needs to be renewed to be worthy of an academic institute with an international reputation.

❖ About online collaboration

Currently Institute members cannot easily collaborate over the Internet (participate in discussion forums, work together on documents, make surveys, etc.); however, while discussing the Web Content Management project we realised that there is a strong need for such tools that should be addressed. The Institute's collaborative projects should be accessible and viewed on our web-site and Intranet as they are part of our activity and also because most of the information generated by the projects is part of our web-site or Intranet (published events, documents, web pages, etc.).

I.4 TASK DEFINITIONS

In this section we describe the tasks to be completed by the contractor in order to fulfil its mission. For each task we provide the final acceptance criteria.

Realisation of these tasks should be done in accordance with the blueprints and requirements provided in Document III and Document IV.

The task lists to be completed in order to reach the general objectives have been separated in two groups (called hereafter "Lots"). A candidate can apply and submit an offer for a single Lot or for both Lots.

These tasks are:

- **Lot 1 Web-site Graphical Identity**
 1. To propose a [new graphical identity](#) for the EUI web-site and intranet that follows the guidelines provided in the Document III blueprint.
 2. To provide the necessary [graphic material](#) to enable the execution of the web-site redesign.

- **Lot 2 Web-site Construction**
 1. Set up and configure the [Web Content Management System](#) (WCMS).
 2. Set up and configure [online collaboration tools](#).
 3. [Creation of custom tools and collection of information](#) from the Institute's existing systems.
 4. [Apply the new graphical identity](#) elaborated on Lot 1 to the web-site and intranet in conjunction with the WCMS
 5. Provide [documentation and training material](#).
 6. [Train key users](#) in the use of the Web Content Management System.

These tasks are explained in detail in the next section.

I.5 LOT 1 - WEB-SITE GRAPHICAL IDENTITY

In order to fulfil the general objectives outlined in section I.2 the following tasks are required to be carried out by the contractor selected for the execution of Lot 1. The execution of these tasks should be done in accordance with the guidelines and directions provided in the blueprint for Lot 1 (See Document III).

In their offers, candidates should provide three different and distinct design proposals for the new web-site's graphical identity.

Candidates will be assessed and selected for Lot 1 based on the quality of their proposals. The successful proposal will serve as a basis for the future web-site's graphical identity

The candidate should remain available until the creation of the web-site is complete in case minor design changes are made necessary by the introduction of the Web Content Management System.

See more details on the offer content in [Part II](#) of this document.

I.5.1 TASK I – CREATION OF A NEW GRAPHICAL IDENTITY FOR THE WEB-SITE AND INTRANET

After selection of the best offer the successful candidate shall meet with the Institute's web-site team in order to review and refine the successful proposal.

Based on the comments provided by the Institute the candidate shall propose a sample design for each specific type of web page including all of the following:

- The EUI homepage
- Department homepage
- Library homepage
- Publications page
- Information for targeted visitors group
- Research overview page
- FAQ page
- Sitemap page
- A to Z index page
- An article page
- Error page
- News section page
- Who's Who search page
- Advanced search page

- General search result page
- Who's who list page
- Who's who detail page
- Events calendar page
- Event detail page
- A "Contact us" page
- A "Job opportunities" page
- A "Services and Admin" presentation page
- A "Programmes & fellowships" overview page
- A page presenting a programme
- A page with testimonials
- Summer schools presentation page
- A photo gallery
- A page to present the project RAME of the Historical Archives of the European Union
- A special page for the project RAME – transferts page

The content of these pages and our guidelines are defined in the blueprint for the new web-site graphical identity (Document III)

At this stage sample pages provided by the successful candidate may take the form of image files.

We remind candidates that all proposals should meet the blueprint requirements and guidelines for Lot 1 (See Document III).

Final acceptance of the sample pages by the Institute will signify acceptance and completion of this task.

I.5.2 TASK 2 – EXECUTION OF THE NEW WEB-SITE LAYOUT

At this stage sample pages (image files) as defined in Task 1 should be provided to the Institute as HTML pages together with [Cascading Style Sheets](#) (CSS) files and images resulting from the HTML cut.

The successful candidate will perform the HTML cut of the sample pages respecting the following rules:

- The HTML cut should be compliant with [W3C CSS 2](#) recommendations.
- Images provided should be free of copyright. Any extra costs linked to the use of images will be at the expense of the candidate.

We remind candidates that all proposals should meet the blueprint and technical requirements for Lot 1.

Final acceptance of the provided layout will be granted by the Institute if sample pages pass the [W3C validation test](#).

The candidate should remain available until the creation of the web-site is complete in case minor design changes are made necessary by the introduction of the Web Content Management System

I.6 LOT 2 - WEB-SITE CONSTRUCTION

In order to fulfil the general objectives outlined under 1.2 the following tasks are required to be carried out by the contractor awarded the execution of Lot 2. The execution of these tasks should be carried out in accordance with the technical requirements and functionalities provided in the blueprint for Lot 2 (See Document IV).

In their offers candidates should propose a Web Content Management System as well as a technical proposal explaining their solutions in order to complete all tasks of Lot 2 in accordance with the institute's requirements (see blueprints in Document III and IV).

This technical proposal should include a detailed plan of the requested infrastructure to set up (network, servers, load balancing configuration, etc.).

Selected candidates will be asked to present the Web Content Management System and defend their technical solutions.

See more detail on the content of the offers to submit in [Part II](#) of this document

I.6.1 TASK 1 – TO SET UP AND CONFIGURE THE WEB CONTENT MANAGEMENT SYSTEM (WCMS)

For security reasons and also to enable an easier integration with the intranet as well as facilitate exchange of data with existing applications, we are in favour of hosting the WCMS and web-site within the EUI. The contractor should make it clear what the architecture requirements are (number and type of servers, CPU, memory,). For more details on the information to provide in the offer, see [Part II](#) of this document.

The Institute will purchase, install and maintain all of the hardware elements necessary for this project. However the successful candidate will assist the Institute in installing and configuring the hardware environment necessary for the WCMS installation.

The successful candidate will then install the selected WCMS product and deploy it with a Production, a Pre-production (staging) and a Test environment.



It should be noted that the set up of the environments includes also the network connection changes and the load balancing, failover and backup configurations explained in our technical requirements. The set up of the Development environment includes not only installing and configuring the instances but also establishing the deployment procedures and testing methods.

More information on the existing technical environment and the architecture design constraints to be respected can be found in Document IV – Part I.

The successful candidate will configure the WCMS product to conform to the functional and technical requirements as expressed in the blueprint provided for Lot 2. (See details in Document IV) and similarly for all the functionalities and requirements the successful candidate agreed to meet in its offer proposal (See Annex III, I.3).

It should be noted that our technical and functional requirements have been categorised into three parts in Document IV (see Document IV, Parts I, II and III). Each part of requirements includes those considered as critical for us (“major”) and those it is considered as an “advantage” to have.

In their submitted offers, candidates should specify which requirements they are able to fulfil or not. (See description of the selection procedure and criteria in [Part IV](#) of this Document)

In the following cases:

- *Where some WCMS tools or functionalities listed in Document IV as “major” are not present by default in the WCMS product provided by the candidate;*

or

- *Where some tools provided in the WCMS product do not meet all major requirements (functional or technical) expressed in Document IV;*

and

- *Where the candidate agreed in its offer for proposal (Annex III) to customise the product in order to provide the Institute with tools or functionalities that are not available by default,*

the successful candidate is expected to create or amend the required tools or functionalities during the execution of this task.

For example: in cases where the WCMS product proposed does not have a “News” tool or the “News” tool available does not offer all of the requested functionalities, the selected candidate is expected to customise the events calendar to fit our requirements.

A test phase of the installation will be carried out by the Institute in order to check the conformity of the installation. The conformity test will check that all functionalities work according to the requirements stated in Document IV.

Successfully passing the test phase will signify the final acceptance and completion of this task.

I.6.2 TASK 2 – TO SET UP AND CONFIGURE ONLINE COLLABORATION TOOLS

If not already included in the default WCMS package the successful candidate should install an online collaboration platform and deploy it with a Production and a Test environment.

The successful candidate should then configure the collaboration tools to conform to our functional and technical requirements as expressed in the Blueprint provided for online collaboration tools (See details in Document IV- section II.17) and this for all functionalities and requirements the successful candidate agreed to meet in its offer proposal (Annex III).

It should be noted that our technical and functional requirements have been categorised into three parts in Document IV (see Document IV, Parts I, II and III). Each group of requirements includes those considered as critical for us (“major”) and those it is considered as an “advantage” to have.

In their submitted offers, candidates should specify which requirements they are able to fulfil or not. (See description of the selection procedure and criteria in [Part IV](#) of is Document)

In the following cases:

- *Where some tools or functionalities listed in Document IV section II.17 as “major” are not present by default in the product provided by the candidate;*

or

- *Where some tools provided in the product do not meet all major requirements(functional or technical) expressed in Document IV section II.17;*

and

- *Where the candidate agreed in its offer for proposal (Annex III) to customise the product in order to provide the Institute tools or functionalities that are not available by default,*

the successful candidate is expected to create or amend required tools or functionalities during the execution of this task.

For example: in case there is no facility for discussion forums, the selected candidate is expected to provide one in order to complete this task.

A test phase of the installation will be performed by the Institute in order to check the conformity of the installation. The conformity test will check that all functionalities work according to the requirements expressed in Document IV section II.17.

Successfully passing the test phase will signify the final acceptance and completion of this task.

I.6.3 TASK 3 – THE CREATION OF CUSTOM TOOLS AND COLLECTION OF INFORMATION FROM THE INSTITUTE’S EXISTING SYSTEMS

Some tools required in the scope of this contract and described in the technical requirements (Document IV – Part III) are very specific to the Institute and make use of information coming from our internal systems.

The realisation of these tools therefore requires that the successful candidate creates a bridge between the WCMS product and some EUI internal systems in order to collect the necessary information.

During the execution of this contract it is mandatory that the successful candidate provide the custom tools as described in Document IV – Part III which are:

- a. “Who’s who at the Institute”. (See detailed requirements on this functionality in Document IV – section III.2). This tool should display information coming from various EUI internal databases.
- b. “Events Calendar”. This tool should display information coming from the Institute’s Events database. (See detailed requirements in Document IV – Part III section III.1).
- c. “Latest Publications of the Institute”. This tool should display aggregated information on EUI publications coming from a publications repository ([DSPACE](#)). (See Document IV – Part II – III.3).

The Institute’s Computing Service will support the successful candidate in the creation of these bridges by:

- o Providing them with a detailed definition of the data structure available for each of the functionalities. (See first drafts of XML data definition in Annex)
- o Collecting and aggregating information from various internal systems (For the “Who’s Who” functionality)
- o Providing access to the up-to-date information sources under the form of either:
 - A provision of a set of XML files and schemas
 - A relational oracle 9i database
- o Keeping up-to-date the information sources by automating the data exportation from internal systems to these sources.

The successful candidate is in charge of:

- Importing information from the sources provided by the Computing Service to the WCMS in order to offer the functionalities as specified by the functional and technical requirements for Lot 2 (Document IV – Part 3)
- Keeping WCMS content up-to-date by automating the data importation.

We consider it is an advantage if the candidate has already the technical knowledge to make use of the standard harvesting protocol OAI-PMH (Open Archives Initiative Protocol for Metadata Harvesting) to transfer metadata directly from the Catalogue (DSpace) into the WCMS product.

This task will be considered as completed successfully when the custom tools mentioned here above (a - c):

- Display automatically up-to-date and complete information coming from our systems.
- Meet the technical and functional requirements expressed in Document IV – Part 3.

I.6.4 TASK 4 – APPLY THE NEW GRAPHICAL IDENTITY TO THE WEB-SITE

For the completion of this task the successful candidate should apply the new graphical identity using the WCMS.

The candidate will have at its disposal the result of the work made after the completion of Lot 1 tasks by the successful candidate for Lot 1.

The candidate will have at its disposal [Cascading Style Sheets](#) files (CSS-2 compliant), images prepared for the web and design samples illustrating the main web pages. ([See list of sample pages](#) that will be provided in Lot 1).

The successful candidate will be requested to make a maximum use of the templates while applying the new graphical identity in order to make future updates easier.

This task also includes the setting up of editing rights on the templates created.

See more on the requirements for template management in Document IV – Part II – Section 9.

This task will be considered as completed successfully when the web-site pages built by the WCMS are the same as design samples approved for the new graphical identity of the web-site (See Lot 1 – Task 1) and this applies to each design sample approved through Lot 1. The Institute may accept minor design changes if the contractor encounters some technical difficulty in the application of the new design.

I.6.5 TASK 5 – TO PROVIDE DOCUMENTATION AND TRAINING MATERIAL

The candidate shall make available different kinds of content to support our use of the WCMS product: user oriented documentation, training material and technical documentation.

The European University Institute has to be able to install and migrate the web-site, the databases and the Web Content Management System to another server, based on the documentation and CD-ROMs with application modules, components, and database-scripts, provided by the successful candidate.

All customised software needs to be documented so that a third party can adapt the software. All documentation needs to be delivered in the English language, in electronic form.

The minimal documentation and training material to be provided are:

- Video tutorials. These small video files should the use WCMS for a specific action (screen capture with audio comments). Audio comments should be in English.

As a minimum requirement, the following topics should be covered:

- How to create a web page
- How to edit a web page
- How to create a new menu section
- How to change a menu name
- How to create a news item
- How to link a news item to an event
- How to add an image or document in a web page
- How to create a form using the form generator
- How to apply a template on a web page or a menu section

The video tutorial should be made available in the form of a CD/DVD ROM and should also be available for download on the intranet or the WCMS homepage.

- A series of “How to” help files available in text(or PDF)
- A document providing short answers to the Frequently Asked Questions
- The WCMS product official documentation (Complete user guide and administrator guide)

- Guidelines with a role-based view dedicated to the editors, publishers and web masters.
- Documentation on technical integration and customization work undertaken by the candidate on the WCMS in Tasks 1 - 3
- Database structure.
The structures of all databases used by the Content Management System and the Online Collaboration tools have to be documented and built according to industry standards. The documentation and the logical structure of the databases have to enable the European University Institute to retrieve the data in the databases for other purposes than publishing them on the web-site. (e.g.: paper brochures, etc.).
- Provide documentation on the imbedded Document Management System (DMS) information structure. Describe each metadata and their relationship. Document the procedure to import/export information from the DMS.

The quality and readability of the material provided should be of good and professional quality. We expect documents to be nicely presented, with pages numbers, tables of contents and up-to-date screenshots and graphs to illustrate the text material.

The video tutorials, FAQs, how-to-help files and role-based guidelines should also be available for electronic consultation in the “HELP” menu of the WCMS product.

This task will be considered as completed successfully upon final acceptance by the Institute of the material provided.

I.6.6 TASK 6 - TRAINING OF KEY USERS

The successful candidate should train key Institute personnel in the day-to-day use of the Web Content Management System. A group of key users will be selected from throughout the Institute (max. 20 persons).

Another training programme dedicated to the WCMS management should be provided to the webmasters of each department (max. 20 persons).

All educational material used for training should be made available to the Institute.

Training sessions should be conducted on the Institute's premises.

The completion of these training sessions will signify the completion of this task.

Part II CONTENT OF SUBMITTED OFFERS

This part of the document describes the content that should be found in the offers received for each Lot. If any elements are missing the offers will be excluded during the first selection phase

II.1 IN GENERAL

Offers submitted should contain, for each Lot, the following general information:

- Name of natural or legal person submitting the offer;
- Legal status of natural or legal person submitting the offer;
- Name and position of the person authorised to sign the contract.
- The candidate's Declaration regarding the Exclusion Criteria duly signed (see [Annex I](#) enclosed)
- The candidate's Declaration regarding the Disputes and Arbitration Clause duly signed (see [Annex II](#) enclosed)
- References and description relating to work and services provided in the field covered by this Request For Proposal in the last three years;
- Certificate of registration with a professional or commercial register imposed by the EU Member State in which the candidate is established.
- And for each Lot
 - A technical proposal (See more in section [II.2](#) & [II.3](#))
 - A financial proposal ([See more](#))
 - A project proposal ([See more](#))

For offers made on Lot 2 candidates should also return the detailed award criteria matrix enclosed, filled-in and duly signed (see [Annex III forms](#)).

II.2 TECHNICAL PROPOSAL FOR LOT 1

In their offer candidates are requested to provide three distinct design proposals for the new website's graphical identity.

Each proposal should have a distinct graphical design.

Proposals should be conveyed on both printed and electronic support.

II.3 TECHNICAL PROPOSAL FOR LOT 2

In their offers for Lot 2 candidates should present:

1. Details of a WCMS product with some screen shots.
The offer should specify very clearly which software is used for which parts, including the name of the third party software providers (if any). If another product is proposed for the online collaboration tools the offer should specify also the name of this product and describe how he intend to integrate it with the WCMS product.
2. The offer should contain references to websites and online collaboration tools created with the product(s) proposed and for each reference indicate their role in the project(if any).
3. In regards of the requirements set out in the Blueprint for Lot 2 (Document IV: Technical and Functional Requirements), candidates should fill in and return their declaration regarding the functionalities offered by the WCMS product proposed and possible customisations (see [Annex III](#) enclosed).
4. Plan of the hardware infrastructure, databases and network necessary for the installation of the WCMS environments (production, staging and test environments). Candidates are required to provide detailed information on each element (type, quantity, CPU, memory, OS, and so forth...). It is also necessary to specify whether server(s) needs to be entirely dedicated to the WCMS and the web-site.
5. Provide details on the solution for load-balancing and backup solutions.
6. Present the architecture of the WCMS product proposed. If the WCMS has a modular architecture, candidates should provide an interaction diagram and indicate the programming language used, the API interfaces available, web services available, and databases interacting with each module.
7. Present technical solutions that will be set up to complete Tasks 1 – 3 ([I.6.1](#) - [I.6.3](#)). What is required here is the presentation of an overall picture of how candidates intend to complete these tasks. Highlight the advantages, tools services or interfaces from the WCMS that it is planned to use based on the fact that it is possible to exchange information with existing applications through XML.
We particularly would like to have an idea on how it is intended to implement some custom tools and functionalities (Who's Who, events calendar, news, etc).
8. In the case where a product proposed for setting up the online collaboration tools is not the same as the WCMS product, details should be provided on the software that will be used and it should be specified how it will be integrated within the WCMS and our web-site and intranet (both technically and from a user point of view).
9. Provide details and a clear view of the possibilities of user roles, rights management and workflow controls available in the WCMS product.
10. Mention any recurrent fees, both of the web-builder and of third parties related to licensing or upgrading.
11. In the context of integration with a external Document Management System(unspecified) where we would store our media and documents to be used on the web-site pages: explain

what are the WCMS product's services that would make this integration possible (tools or in/out interfaces to be used) and give a brief description of how this will be done

12. List the reporting possibilities on the WCMS product usage (with screenshots if possible).

If they wish, candidates may also:

1. Propose an automatic off-site back-up solution. In this case the candidate should provide all pricing details in a separate offer.

Candidates who successfully pass the exclusion phase will be asked to present the proposed products and justify their technical solution.

II.4 FINANCIAL PROPOSAL

The financial proposal (one for each Lot) should state the overall price for each Lot (see III.1).

For each Lot, a breakdown of the prices per task should be provided.

II.5 PROJECT PROPOSAL

The project proposal should present the project methodology that will be used for each task and the following should be specified:

- The number of people involved along with their functions and expertise (e.g., Senior Developer, Project Manager, etc.)
- An estimation of the time involved in the execution of the task stated in number of man days
- In the case of on-site execution of all or part of the work, the number of persons involved along with the frequency and duration of their presence on the Institute's premises should be explicitly stated

Part III **CONTRACTUAL AND FINANCIAL TERMS**

In this part we will outline the most important terms and conditions for the project. These terms and conditions will form the basis of the co-operation, should you be selected as web-builder.

The final contract is subject to the terms and conditions in this RFP and in the offer presented by the web-builder. In case of conflict, the RFP takes precedence over the offer, unless stated otherwise in the contract. The contract is subject to Italian law.

III.1 **PRICES**

Prices should be quoted in Euro and should be quoted free of all duties, taxes and other charges, including VAT, as the Institute is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Commission.

Prices shall be firm and not subject to revision.

III.2 **PAYMENTS**

The European University Institute will be responsible for all payments.

An initial down-payment of 20% of the total amount will be paid after the signature of the contract.

A second payment will be made after the execution and approval of the web site lay-out (Task 2 for Lot 1) and after the execution and acceptance of Tasks 1 to 4 for Lot 2 (50%)

The remaining 30% will be paid after the final delivery and approval by the European University Institute.

All invoices will be paid within 30 days of invoicing.

III.3 **BUDGET**

Candidates are informed that the European University Institute will assess the offers based on their quality and the overall price. The overall price will take into account both the offer's total price and any auxiliary costs foreseen by the architecture to be set up (such as servers, licences, etc.).

III.4 JOINT OFFERS

Joint offers from consortia of service providers are permitted provided that conditions for adequate competition are observed. The consortium should clearly indicate which service provider will be carrying out which tasks as well who has been appointed by the others as the lead partner.

III.5 SUB-CONTRACTING

Sub-contracting is allowed and even encouraged if the sub-contractor brings added value to the project (i.e. for the graphical aspect of the web-site). It is up to the web-builder to explain the added value of the sub-contractor. Details of previous projects and co-operation between the web-builder and sub-contractor are appreciated. The offer should make very clear which parts of the project will be executed by the web-builder and which parts will be executed by the sub-contractor(s).

During the project, there is no legal tie between the European University Institute and the sub-contractor. The web-builder takes full responsibility for all aspects of the project, including those he has sub-contracted out.

Even if there are sub-contractors, the web-builder remains the sole point of contact for the entire project.

III.6 SECURITY AND CONFIDENTIALITY

Where the web-builder has access to confidential information during the course of the development agreement, the web-builder will not use any such confidential information for its own benefit or use, disseminate or publish this confidential information without the prior consent of the European University Institute.

All records or other material, including any copies thereof, pertaining to confidential information, and all other records or materials developed by the web-builder during the course of the agreement will remain the property of the European University Institute and upon termination of the agreement, will be returned to the European University Institute.

The web-builder's confidentiality obligations will survive the termination of this agreement.

The confidentiality obligations of the web-builder also pertain to this RFP, the contract and all annexes. As a consequence, these cannot be published, reproduced or shared with any third parties unless by written permission of the European University Institute.

III.7 PUBLICITY

The web-builder agrees not to publicise his connection to the European University Institute during the execution of this contract without prior written consent by the European University Institute.



Once the project is finished, the web-builder is entitled to mention the European University Institute.

III.8 OWNERSHIP

The web-builder cannot sell or give away the customised software in any form to third parties without the consent of the EUI. The web-builder can use the method, tools and application-independent modules for other purposes. The price setting of these modules should reflect the fact they are re-usable or standardised.

III.8.1 SOFTWARES

By software we mean: the Web Content Management System, its customizations for the European University Institute and any other software installed during the course of this contract for the setting up of the WCMS.

It is preferable that the WCMS software product installed on the Institute's premises become the property of the European University Institute. If this is not the case, the European University Institute needs to be assured of the software's availability through, for example, the use of a software escrow.

Any custom development, tool or functionalities created under this contract becomes the property of the European University Institute.

In case of bankruptcy of the web-builder, ownership of the software that the web-builder has developed is automatically transferred to the European University Institute. If the web-builder files for bankruptcy during the project, the work the web-builder has done for the Institute up to that date will automatically become the property of the European University Institute. For this reason also, the web-builder is encouraged to provide a software escrow.

The European University Institute or any other third party contracted by the Institute for this purpose can adapt the software as installed on its premises.

The European University Institute cannot give, resell, or make any profit on the WCMS product source code.

The European University Institute has the right to install or migrate the web-site, the databases and the Web Content Management System product to another infrastructure (server, network database, etc.) of its choice.

III.8.2 CLIENT WEB PAGES

The content generated by the Web Content Management system use, including HTML code and scripts, may be adapted by the European University Institute or by a contractor appointed by the European University Institute.

III.8.3 DOCUMENTATION

All documentation and training material provided and developed for the personalisation of the content management system by the web-builder under this contract will become the property of the European University Institute. However the European University Institute cannot give, resell, or make any profit on this material.

III.8.4 CONTENT

All information and content (text, images, video, etc.) used by the Web Content Management System to produce web pages are the ownership of the European University Institute and cannot be re-used, given or sold by the web-builder.

III.9 HELP DESK

The contract should include provision for help desk support to be maintained for a given period (preferably 1 year) after completion of the project

All questions about the WCMS will be redirected to the help desk. There should be two help lines, one for the general day-to-day user requests and the other one for the technical requests coming from our technical team.

For each support line a unique phone number, a unique contact person and an email address should be provided

The help lines should be reachable during week days and office hours (9h00 – 18h00).

All support requests should be answered and logged in a tracking system (of the web-builder's choosing). The tracking system should be made available for our consultation.

III.10 CORRECTIVE MAINTENANCE AND RECURRENT FEES

Standard corrective maintenance is expected. The standard corrective maintenance of the services and products that are delivered within the framework of this contract is aimed at guaranteeing the correct functionality of the services and products.

Corrective maintenance:

Corrective maintenance aims to correct flaws in the software. If there are any problems with the applications and products developed or installed by the web-builder, the web-builder will find a solution for them. Flaws discovered during the first year following the final delivery date are corrected by the web-builder free of charge.

Any anomaly between the description of the software as required in the functional and technical specifications (See Document IV) and the actually delivered software will be

considered a flaw. Anything that does not work properly as described or that generates errors will also be considered a flaw.

Desired functionalities or possibilities added by the European University Institute after the signature of the contract and hence not included in the functional and technical specifications (see blueprints in Document IV) are not considered flaws.

Management of requests for changes

It is mandatory that all flaws notified and requests for changes made by the European University Institute are logged by the web-builder into a bug/request tracking system accessible for consultation by the Institute. The system should be chosen and set up by the web-builder *at the beginning* of the contract execution.

In addition to the standard corrective maintenance the candidate can propose an advanced maintenance fee in its offer. In this case it is necessary to provide a detailed description of what it entails and what the added value is compared to the standard corrective maintenance.

If there is an upgrade programme for the standard softwares used by the contractor for this project, this also needs to be explicitly mentioned.

Recurrent fees, both of the web-builder and of third parties related to licensing or upgrading should be explicitly mentioned in the offer.

III.11 CHANGES IN THE SPECIFICATIONS

If the European University Institute requires changes to the software that are not included in the functional and technical specifications as detailed in Document III and IV of this Request For Proposal, a separate Request For Proposal will be made.

The web-builder guarantees to charge the European University Institute minimal rates for any additional services outside of this project.

III.12 DELIVERY AND APPROVAL

The deliverables and acceptance criteria provided for each task are stated in this Request For Proposal (See [Part I](#) of this document).

After delivery of the products and services described in this Request For Proposal, the European University Institute has 60 calendar days to grant its final approval. The result will be sent to the web-builder in writing.

The approval entails that the European University Institute will confirm that the delivered products and services comply with all the specifications in the contract and that the design, tools and functionalities proposed by the candidate in the offer proposal meet the requirements expressed in Document III and IV. The European University Institute reserves the right to hire a third party to perform the inspection of the delivered products and services.

III.13 PENALTIES

Products and services that do not comply with the specifications in the contract will have to be remade, reinstalled or adapted by the web-builder including hidden flaws. If the web-builder refuses to do so, the European University Institute will employ a third party to do so and charge the web-builder for all incurred costs. If a delay in correction takes longer than one month, a penalty of 1 % of the products and services' value per week of delay will be calculated with a maximum of 15% of the total price of the offer.

If the products and services described in the contract are not delivered within the timeframe specified in the contract, the web-builder will be held liable. The penalties for untimely delivery of the products and services described in the contract will be calculated at a rate of 1% of the products and services' value per calendar day of delay, with a maximum of 15% of the total price of the offer.

If the web-builder foresees a delay, he will inform the European University Institute of the expected delay as soon as possible.

III.14 WARRANTIES

The products and services delivered will have a warranty of one year starting after the final approval by the EUI. The warranty covers the good functionality of the products and services according to the technical specifications laid down in Documents III and IV.

If products and services fail to function and the failure is the responsibility of the web builder, this period of non-performance will be added on to the one-year warranty period and will be subject to penalties.

III.15 TIME-FRAME FOR THE EXECUTION OF THE CONTRACT

The starting and ending time for the execution of the contract will be set by mutual agreement, and will be inserted in the contract. Failure to start the contract execution by the agreed time will result in the application of the penalties mentioned in [section III.13](#) of this document.

If the deliverables or the services provided are not complete or have not received the European University Institute's final approval (See [section III.12](#)), the penalties mentioned in [section III.13](#) of this document will apply.

III.16 PLACE OF EXECUTION.

The web-builder can choose the place of execution of the contract (on-site or remote). However to facilitate collaboration, validation of the work accomplished and the timely implementation of any requested changes the European University Institute strongly prefers that the execution of the contract takes place on the Institute's premises (on-site).

In the case of on-site execution the Institute will provide office space for the web-builder's team on its premises (up to 2-3 people). However the Institute will only provide the equipment and material foreseen by the agreed architecture plan for the Web Content Management System. Any other material for the day-to-day work of the Web-builder's team should be provided by the web-builder. The exact terms of the place of execution will be discussed and agreed before contract signature.

III.17 CONTACT POINT

There should be only one contact person for communication with the Institute on the project (a backup only in case of extreme necessity).

This contact person should speak English and be reachable by email and phone during week days from 9.00 AM to 18.00 PM Brussels time.

III.18 DISPUTES AND ARBITRATION

The web-builder will agree to and accept the following clause:

Any disputes arising out of the terms and conditions of this announcement, the procedure for the assessment and selection of the successful candidate, or the contract for the management of the service shall be subject to voluntary arbitration. Pursuant to Article 808 ter of the Italian Code of Civil Procedure, by derogation from the provisions of Article 824 bis, the parties agree that any dispute shall be settled by arbitration as laid down in the contract.

The arbitrators shall be three in number, one for each party concerned and the third designated by mutual agreement of the first two; if no agreement can be reached the third shall be designated by the President of the Florence Bar Association at the instigation of either party. Arbitration shall take place in Florence.

The award shall be made within three months of the date of the first meeting of the board of arbitration with a chairman in place; the applicable regulations shall be those laid down from time to time by the board of arbitration; the award criteria shall be those laid down by Article 823 of the Italian Code of Civil Procedure.

The web-builder should sign the text of this clause and return it to us included with the offer proposal.

See document to be returned duly signed in the Annexes of this Request For Proposal(Annex II).

Part IV INFORMATION CONCERNING THE EVALUATION OF OFFERS

Offers will be assessed and selected by the Institute in three different stages. Only offers that meet the requirements of each stage will pass on to the next:

Stage 1 Evaluation of the offers against the exclusion criteria (See [section IV.1](#))

Stage 2 Evaluation of the offers against the award criteria based on the offers submitted. (See [section IV.2](#))

Stage 3 Evaluation of the offers through a live demonstration and a Question & Answers session in the Institute premises. (For Lot 2 only).

- The best proposal for Lot 1 will be selected at the end of stage 2.
- The best proposal for Lot 2 will be selected at the end of stage 3.

All candidates will be told of the result of the offers selection at the end once it has been completed. (After Stage 2 [for Lot1] or Stage 3 for Lot2)

IV.1 STAGE 1 - EXCLUSION CRITERIA

A list of the exclusion criteria is provided in Annex I of the Request For Proposal.

Candidates should read and confirm that they fulfil positively the conditions stated in the exclusion criteria declaration (see Annex I).

We ask the candidates to sign the text provided in Annex I concerning the exclusion criteria and return it to us included with their offer proposal.

Any candidate not returning the declaration duly signed in the offer proposal or having made false statements in its declaration will be excluded from this contract.

IV.2 STAGE 2 - AWARD CRITERIA

The contract will be awarded to the candidate offering the best quality for money. The quality of each offer will be evaluated in accordance with the award criteria and the associated weighting.

IV.2.1 GENERAL AWARD CRITERIA

This grid is provided for information purpose. It will be filled in by the European Institute staff while assessing the candidates offers for each Lot.

General advantageous criteria	Yes/No
The candidate – having submitted offers for both Lot - has been selected in the second phase for Lot 1 and Lot 2	<input type="checkbox"/>
.....	<input type="checkbox"/>
Total marks	

IV.2.2 AWARD CRITERIA FOR ASSESSMENT OF OFFERS ON LOT 1

You will find below the list of the award criteria we will use to assess offers received for the new web-site graphical identity. This grid will be filled-in by the European University Institute staff while assessing the candidates offers for each Lot.

Criteria and weighting for Lot 1	Score
General artistic quality, creativity and variety of the three layout proposals. (We recall that each one of the three proposals should follow different graphic lines)	/20
Respect of the guidelines and blueprint contained in Document III of the Request For Proposal	/20
Quality and completeness of the user interface elements illustrated and user friendliness of the web site design proposed (is the navigation clear? is the content readable enough in the page? Where are tools disposed?, and so forth...)	/20
Offer price	/40
Total	/100

IV.2.3 AWARD CRITERIA FOR ASSESSMENT OF OFFERS ON LOT 2

We base the award criteria matrix for assessment of the offers received for Lot 2 on the requirements (major or advantageous) expressed in Document IV of this Request For Proposal.

- ❖ Major requirements or functionalities are important for us and will have a heavy weight in the selection phase.
- ❖ Advantageous requirements or functionalities are something we would like to have but that are not critical or decisive. They can weigh in favour of a candidate in the final decision.

The candidate best able to provide the system that fits the greatest number of our requirements will be selected.

We ask therefore the candidates to inform us on their ability to satisfy our needs by filling-in the award criteria matrix provided in Annex III of the Request For Proposal, sign it and return it to us included in the offer proposal.

We will base our second selection phase on this matrix and we will verify that all the assertions are true and correct during the presentation and Q&A in stage 3 (Only for selected candidates).

We therefore ask you to answer this matrix with the most attentive care.

Any candidate not returning the award criteria matrix duly completed and signed with its offer proposal or having lied in its declaration will be excluded from this contract.

We understand that it may be difficult for a market product to meet all our requirements by default. Therefore when your product does not offer functionality stated as "major" in our requirements(Document IV) we ask you to tell us if you CAN and WILL customise your product to make it available.

All customizations to meet our requirements are part of this contract and cannot be charged in addition to the price offer submitted for this Request For Proposal.

During the selection we will NOT automatically eliminate proposals that do not meet all of our major requirements. We will assess all offers comparatively and select the best offer based on our priorities.

Find below the general weighting grid that will be used by the European University Institute staff for the assessment candidates offers for Lot 2.

Weighting grid for Lot 2	Weight
Understanding of the technical specifications in terms of required work input and quality and suitability of the proposed end product.	/7
Proposed solutions and methodology for resolving the questions underlying this assignment, taking account of the Institute needs and feasibility for the realisation of custom tools and functionalities. (We refer here to description of technical solutions provided in offers. See section II.3)	/7
Planning and organisation of the team with a view to manage the assignment taking also account of the indicated time frame	/6
Architecture and infrastructure proposed	/10
Price	/30
Quality of the technical proposals (see results for detailed award criteria matrix for Lot 2 in Annex III)	/35
Presentation and justification of the technical solutions	/5
Total	/100