Call for tenders

Managed IT Services

Provision of end-user support in the field of information systems

For the Joint Undertakings located in the White Atrium building, Brussels, Belgium

Annex A.2
Technical Evaluation
Questionnaire

Name of the tenderer: ……………………………………………

TECHNICAL EVALUATION

Tenderers have to fill in this Technical Evaluation Questionnaire.

Please note that answering the below technical evaluation questions only by doing cross-references to another answer is not permitted. Each question has to be answered individually.

Tenderers are asked to provide specific documents relevant to this Call for Tenders and not general purpose or marketing materials. Tenders should not contain answers with text that is irrelevant with the questions asked or text that is too generic and not customised for the specific Call for Tenders in a comprehensive and concise manner: submission of such answers will be taken into account by the Evaluation Committee in its scoring.

Please note that pricing information must <u>not</u> be included in answers to the technical evaluation questions and supporting documents.

By submitting a tender, tenderers are committing themselves to provide the services in full compliance with the tender specifications and annexes. Any answers that are not compliant with the requirements of the tender specifications and annexes will not be taken into account during contract execution when the provisions of the tender specifications take precedence. Non-compliant answers will however negatively affect the evaluation of the tender.

The below questionnaire contains a set of questions. Please note that answers to those questions are contractually binding.

There is a specified maximum number of pages per answer. This number must not be exceeded. The Evaluation Committee will only evaluate and take into account text that is drafted from the beginning of an answer until the end of the page number indicated as maximum page limit. Any text after the maximum page count indicated will be disregarded and not taken into account (positively or negatively) in the technical evaluation. The JUs reserve the right to request tenderers to provide a copy of their answers in a format that permits electronic word searching (e.g. .docx or equivalent).

INTRODUCTION

The tenderer is asked to submit 7 documents that show a coherent approach to the provision of the requested services according to the tender specifications.

The documents should be "self-contained" (i.e. contain all information relevant to allow evaluation for the respective criterion).

The tenderers must use the numbering and titles specified below.

1. EVALUATION OF THE OFFER – TECHNICAL EVALUATION

> Tenderers have to fill-in this Technical Evaluation Questionnaire and provide the requested supporting documentation. The technical evaluation of the offers will be based on a rating of the quality criteria indicated in the table below:

Criterion	Maximum points	Minimum points to obtain

1. Overall management of the contract
 	
    o Overall Vision and Approach **(max. 10 Points)**
    o Phase-in, phase-out **(max. 10 Points)**
    o Reporting and meeting minutes **(max. 10 Points)**
    o Quality Control **(max. 10 Points)**
	40	20 (50%)

2. Servicedesk - Provisioning of end-user support
 	
    o Overall Vision and Approach **(max. 10 Points)**
    o Service Delivery Plan **(max. 40 Points)**
    o Management of servicedesk **(max. 50 Points)**
    o Approach to Service Level Management **(max. 50 Points)**
	150	75 (50%)

3. Network infrastructure Management
 	
    o Overall Vision and Approach **(max. 10 Points)**
    o Network Connectivity and Management **(max. 30 Points)**
    o Wireless Infrastructure **(max. 30 Points)**
    o VPN or equivalent technology **(max. 30 Points)**
	100	50 (50%)

4. Hardware Management & Support
 	
    o Overall Vision and Approach **(max. 20 Points)**
    o Setup and installation of end-user equipment **(max. 30 Points)**
    o Multi-functional devices (MFDs) management **(max. 10 Points)**
    o Equipment Repair Services & Disposal **(max. 10 Points)**
	70	35 (50%)

5. Application Services Management o Overall Vision and Approach **(max 10 Points)** o Server OS and application maintenance **(max 30 Points)** o Client OS and application maintenance **(max 20 Points)** o Security Management **(max 30 Points)**	90	45 (50%)
6. Voice and Telecom / PABX end-user support o Overall Vision and Approach **(max 10 Points)** o End-user telephone support **(max 20 Points)** o Maintenance and upgrade of the PABX **(max 20 Points)** o Evolution towards unified communications **(max 20 Points)** o Reporting (all itemisation by JU) and billing solution **(max 20 Points)**	90	45 (50%)
7. Microsoft Cloud Support Services o Overall Vision and Approach **(Max. 10 Points)** o Migration **(Max. 25 Points)** o Management and end-user support **(Max. 25 Points)**	60	30 (50%)
OVERALL RESULT	**600**	**360 (60%)**

1.1. Thresholds

For the technical evaluation an overall minimum threshold of 60 % will apply; in addition a minimum threshold of 50% will apply for each criterion. Tenders that do not achieve these minimum thresholds will be eliminated at this stage and not be considered for the financial evaluation.

Each criterion is evaluated through a number of questions. A specific weight is assigned to each question within a criterion or within a sub-criterion. No minimum number of points is allocated to sub-criteria and questions, just maximum points.

1.2. Supporting Documents

The tenders must provide 7 supporting documents. Supporting documents must show a coherent approach to provide the requested services according to the tenderers specifications.

- Overall management of the contract, **max. 15 pages**
- Delivery of Servicedesk - Provisioning of end-user support services, **max. 25 pages**
- Delivery of Network infrastructure Management services, **max. 15 pages**
- Delivery of Hardware Management & Support services, **max. 10 pages**
- Delivery of Application Services Management services, **max. 15 pages**
- Delivery of Voice and Telecom / PABX end-user support services, **max. 10 pages**
- Delivery of Microsoft Cloud Support Services, **max. 20 pages**

Your reply to the question relating to the technical evaluation should respect the maximum of pages indicated above, using font size not less than 11.

1.3. Attachments

Any additional attachments are not permitted.

2. MANDATORY REQUIREMENTS

Tenderers have to answer to all mandatory requirements.

2.1. Document Submission	
1. Have you submitted the following documents: • Overall management of the contract • Delivery of Servicedesk - Provisioning of end-user support services • Delivery of Network infrastructure Management services • Delivery of Hardware Management & Support services • Delivery of Application Services Management services • Delivery of Voice and Telecom / PABX end-user support services • Delivery of Microsoft Cloud Support Services	☐YES / ☐NO **(Mandatory)**
2.2. Overall Management Approach	
1. Do you commit to – that whatever the contractual form associated suppliers decide to take, its participants shall not – towards the JUs – behave as individual entities, but to act with solidarity in all aspects, including in their responsibility toward SLA's and liquidated damages?	☐YES / ☐NO **(Mandatory)**
2. Do you commit to have a single contact person for commercial issues and a single contact person for operational issues?	☐YES / ☐NO **(Mandatory)**
3. Do you commit to provide sufficient management resources to conduct the service design and service transition phases – to fully implement the essential service components within 3 months after the signature of the framework contract?........	☐YES / ☐NO **(Mandatory)**
4. In the context of exit management, do you commit to provide full assistance and cooperation to the new contractor, hand-over of the relevant information in an operational format and to assist the new contractor tacking over the service?	☐YES / ☐NO **(Mandatory)**
5. Do you commit to a formal and thorough handover in case key staff leaves (management, operational management, team leaders, staff with particular knowledge or experience)?	☐YES / ☐NO **(Mandatory)**
6. Do you commit to provide sufficient training for your staff and to ensure that your staff maintains proficiency in view to the technological evolution and to the evolution of processes, procedures and tools?	☐YES / ☐NO **(Mandatory)**
7. Do you commit that all profiles have (or acquire within weeks after the start of their assignment) knowledge of the operational ITIL processes.	☐YES / ☐NO **(Mandatory)**
8. Do you accept the JUs right to refuse staff whose level of competence and experience is not at least equal to the requirements in terms of profiles and levels as part of your technical offer? Do you commit to replace this staff with a better suited candidate?	☐YES / ☐NO **(Mandatory)**
9. Do you commit to abide by all the rules regarding security, regarding access to the buildings and the resources of the JUs?	☐YES / ☐NO **(Mandatory)**

3. OVERALL MANAGEMENT OF THE CONTRACT (MAX.40 POINTS/MIN.20 POINTS)

Overall management of the contract refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Overall management of the contract" is (**max 15 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max. 10 Points)**
- o Phase-in, phase-out **(max. 10 Points)**
- o Reporting and meeting minutes **(max. 10 Points)**
- o Quality Control **(max. 10 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document

3.1. Overall management of the contract	MAX POINTS:	40	

3.1.1. Overall Vision and Approach	MAX. POINTS	10	REFERENCES
Max. Points 5	Detail the resources you propose for the contract. Describe their roles and high-level work that you propose to assign to the team members based on the profiles described in the service requirements.		
Max. Points 5	Describe you approach to training, communication, methodology, the use of a ticketing system and other tools or techniques.		

3.1.2. Phase-in, phase-out	MAX POINTS	10	REFERENCES
Max. Points 5	**Phase-in** How do you propose to manage the phase-in of the framework contract (e.g. during the 6 first months) in order to be in a position to provide the best services to the JUs at the shortest possible time?		
Max.5 Points	**Phase-out** Detail your proposal for a smooth handover of the Servicedesk and procedures at the end of the contract. Describe how you would foresee the transfer of all delivery results. Please explain which elements you consider as delivery results that you plan to handover and describe your reasoning behind your specific handover approach.		

3.1.3. Reporting and meeting minutes	MAX POINTS	10	REFERENCES
Max. Points 10	Describe how you intend to organise the process of reporting on your activities for the framework contract in conformity with the Service Requirements and the Service Level Agreement you will implement. Describe your approach to the meeting structure and template for agenda and minutes.		

3.1.4. Quality Control	MAX POINTS	10	REFERENCES
Max. Points 10	Describe the quality control and quality assurance measures that you would offer to put in place to ensure a high-quality provisioning of services. Describe the security- and confidentiality-related practices you will put in place when executing the framework contract (e.g. concerning staff, infrastructure and electronic communications)		

4. SERVICEDESK - PROVISIONING OF END-USER SUPPORT SERVICES (MAX.150 POINTS/MIN. 75 POINTS)

Servicedesk - Provisioning of end-user support services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Servicedesk - Provisioning of end-user support services" is (**max 25 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max. 10 Points)**
- o Service Delivery Plan **(max. 40 Points)**
- o Management of servicedesk **(max. 50 Points)**
- o Approach to Service Level Management **(max. 50 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document

4.1. Servicedesk - Provisioning of end-user support services	MAX POINTS:	150	

4.1.1. Overall Vision and Approach	MAX. POINTS	10	REFERENCES
Max.10 Points	Describe your structural approach to achieving the requirements expressed in Annex A1, §3.1, explain in particular the contractual structure to be implemented.		

4.1.2. Service Delivery Plan	MAX POINTS	40	REFERENCES
Max.10 Points	**Overall Approach** Describe your general approach to the delivery of services.		
Max.15 Points	**Essential Requirements** Describe your approach to the internal team organisation, responsibility allocation, work schedules covering the required availability of service and covering the variations in workload.		
Max.15 Points	**Security Management** Describe you approach to the security management and Business Continuity Management		

4.1.3. Management of servicedesk	MAX POINTS	50	REFERENCES
Max. 10 Points	**Overall Approach** Describe your general approach to the delivery of services.		
Max. 10 Points	**Staffing Approach** Describe your general approach to determining the number of staff (# FTEs) required to provide a service based on the Service Requirement.		
Max. 10 Points	**Profiles and Levels** Describe how you will ascertain that every staff you intend to recruit corresponds to these requirements. Explain which profile-levels will be assigned to the various areas of responsibility and levels of competence. Explain how your choices ensure that all services required will be covered.		
Max. 20 Points	**Meeting essential and specific requirements** The tenderer must describe how he will: Fulfil the activities described in Annex A1 §3.1 "Hotline service" and "Ticketing system" Fulfil the activities described in Annex A1 §3.1 "Proximity Services"		

	Fulfil the activities described in Annex A1 §3.1. "Change, Incident and Problem management"			
4.1.4. Approach to Service Level Management		MAX POINTS	50	REFERENCES
Max.10 Points	**Overall Approach** Describe your general approach to the delivery of services.			
Max.10 Points	**Staffing Approach** Describe your general approach to determining the number of staff (# FTEs) required to provide a service based on the Service Requirement.			
Max.10 Points	**Profiles and Levels** Describe how you will ascertain that every staff you intend to recruit corresponds to these requirements. Explain which profile-levels will be assigned to the various areas of responsibility and levels of competence. Explain how your choices ensure that all services required will be covered.			
Max.10 Points	**Procedures, control and follow-up** The tenderer has to provide a summary description of procedures to be used to sustain the SLA. The tender has to indicate his approach to maintain General Performance Indicators (GPI), Key Performance Indicators (KPI) and Quality Indicators (QI) under control; and how he will act in case of temporary underperformances to return rapidly to a satisfactory service level.			
Max.10 Points	**Continual Service improvement** The tender has to indicate his approach to Continual Service Improvement specifically to increase overall service quality.			

5. NETWORK INFRASTRUCTURE MANAGEMENT SERVICES (100 POINTS/MIN. 50 POINTS)

Network infrastructure Management services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Network infrastructure Management services" is (**max 15 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max. 10 Points)**
- o Network Connectivity and Management **(max. 30 Points)**
- o Wireless Infrastructure **(max. 30 Points)**
- o VPN or equivalent technology **(max. 30 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document.

5.1. Network infrastructure Management services	MAX POINTS:	100	
5.1.1. Overall Vision and Approach	MAX POINTS	10	REFERENCES
max. Points 10	1. Describe your structural approach to achieving the requirements expressed in Annex A1, §3.2, explain in particular the contractual structure to be implemented.		
5.1.2. Network Connectivity and Management	MAX POINTS	30	REFERENCES
max. Points 15	**1. Essential Requirements** Describe your approach to the service availability, maintenance, monitoring, statistics, reporting and documentation.		
max. Points 15	**2. Security Management** Describe you approach to the security management and Business Continuity Management.		
5.1.3. Wireless Infrastructure	MAX POINTS	30	REFERENCES
max. Points 15	**1. Overall Approach** Describe your general approach to the delivery of services.		
max. Points 15	**2. Meeting essential and specific requirements** The tenderer must describe how he will: • provide access to Internet to JUs' guests and visitors, as well as a dedicated network for the staff; • Isolate the WiFi traffic from the local network of the JUs; • Manage, monitor and report on the services provided over the WiFi.		
5.1.4. VPN or equivalent technology	MAX POINTS	30	REFERENCES
max. Points 15	**1. Overall Approach** Describe your general approach to the delivery of services.		
max. Points 15	**2. Meeting essential and specific requirements** The tenderer must describe how he will **maintain and improve the** solution in place as described in chapter 1.1.8 of Annex A1 Service Requirements.		

6. HARDWARE MANAGEMENT & SUPPORT SERVICES (70 POINTS/MIN. 35 POINTS)

Hardware Management & Support services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Hardware Management & Support services" is (**max 10 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max. 20 Points)**
- o Setup and installation of end-user equipment **(max. 30 Points)**
- o Multi-functional devices (MFDs) management **(max. 10 Points)**
- o Equipment Repair Services & Disposal **(max. 10 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document.

6.1. Harware Management & Support Services	MAX POINTS:	70	

6.1.1. Overall Vision and Approach	MAX POINTS	10	REFERENCES
max. 10 Points	**1.** Describe your structural approach to achieving the requirements expressed in Annex A1, §3.3, explain in particular the contractual structure to be implemented.		

6.1.2. Setup and installation of end-user equipment	MAX POINTS	30	REFERENCES
max. 15 Points	**1. Overall Approach** Describe your general approach to the delivery of services with specific attention to: • the firmware patching methodology • securing the devices		
max. 15 Points	**2. Essential Requirements** Describe your approach to the building and provisioning of the driver –related aspects of the reference configuration images, taking into consideration the following constraints: - The hardware reference models may change each year - Each JU might select its own reference model(s)		

6.1.3. Multi-functional devices (MFDs) management	MAX POINTS	15	REFERENCES
max. 5 Points	**1. Overall Approach** Describe your general approach to the delivery of services.		
max. 10 Points	**2. Meeting essential and specific requirements** The tenderer must describe how he will take over the complete management of the existing and any future copiers including installation of devices, services, supplies and repairs requests.		

6.1.4. Equipment Repair Services & Disposal	MAX POINTS	15	REFERENCES
max. 15 Points	Describe in detail your approach to the delivery of services as described in the relevant paragraphs of point 3.3 of Annex A1 Service Requirements.		

7. APPLICATION SERVICES MANAGEMENT SERVICES (90 POINTS/MIN 45 POINTS)

Application Services Management services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Application Services Management services" is (**max 15 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max 10 Points)**
- o Server OS and application maintenance **(max 30 Points)**
- o Client OS and application maintenance **(max 20 Points)**
- o Security Management **(max 30 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document.

7.1. Application Services Management services	MAX POINTS:	90	

7.1.1. Overall Vision and Approach	MAX POINTS	10	REFERENCES

max Points	10	**1.** Describe your structural approach to achieving the requirements expressed in Annex A1, §3.4, explain in particular the contractual structure to be implemented.	

7.1.2. Server OS and application maintenance	MAX POINTS	30	REFERENCES

max Points	15	**1. Overall Approach** Describe your general approach to the delivery of services with specific attention to: • the patching methodology • keeping up with the build releases of the server operating systems • securing the server software	
max Points	15	**2. Essential Requirements** Describe your approach to the provisioning of the server OS, patching methodology, monitoring of the servers' health and performance.	

7.1.3. Client OS and application maintenance	MAX POINTS	20	REFERENCES

max Points	10	**1. Overall Approach** Describe your general approach to the delivery of services with specific attention to: • the patching methodology • keeping up with the new releases of the client OS and software • securing the client devices	
max Points	10	**2. Essential Requirements** Describe your approach to the provisioning of the client OS and software applications, patching methodology, monitoring of their health and performance.	

7.1.4. Security Management	MAX POINTS	30	REFERENCES

max Points	15	**1. Overall Approach** Describe your approach to the security anagement and business continuity management (1.5 of Annex A1 - Service Requirements.	
max Points	15	**2. Specific requirements** The tenderer has to indicate his approach to the specific requirements described in 1.3.5 of Annex A1. - Service Requirements).	

8. VOICE AND TELECOM / PABX END-USER SUPPORT SERVICES (90 POINTS/MIN.45 POINTS)

Voice and Telecom / PABX end-user support services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Voice and Telecom / PABX end-user support services" is (**max 10 pages**) divided in the following 4 parts:

- o Overall Vision and Approach **(max 10 Points)**
- o End-user telephone support **(max 20 Points)**
- o Maintenance and upgrade of the PABX **(max 20 Points)**
- o Evolution towards unified communications **(max 20 Points)**
- o Reporting (all itemisation by JU) and billing solution **(max 20 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document.

8.1. Voice and Telecom / PABX end-user support services	MAX POINTS:	90	
8.1.1. Overall Vision and Approach	MAX POINTS	10	REFERENCES
max 10 Points	Describe your structural approach to achieving the requirements expressed in Annex A1, §3.5, explain in particular the contractual structure to be implemented.		
8.1.2. End-user telephone support	MAX POINTS	20	REFERENCES
max 20 Points	Describe your detailed approach to the delivery of end-user telephone support.		
8.1.3. Maintenance and upgrade of the PABX	MAX POINTS	20	REFERENCES
max 20 Points	Describe your detailed approach to the delivery of Maintenance and upgrade of the PABX.		
8.1.4. Evolution towards unified communications	MAX POINTS	20	REFERENCES
max 20 Points	Describe your detailed approach to the delivery of Evolution towards unified communications.		
8.1.5. Reporting (all itemisation by JU) and billing solution	MAX POINTS	20	REFERENCES
max 20 Points	Describe your detailed approach to provide reporting (all itemisation by JU) and billing solution.		

9. MICROSOFT CLOUD SUPPORT SERVICES (MAX. 60POINTS/MIN. 30 POINTS)

Microsoft Cloud Support Services refer to the following documents:

- Annex A1 Service Requirements
- Annex B2 Service Level Agreement for Managed Services

In reply to the requirements in those documents, the tenderer must supply an explanatory document: "Delivery of Microsoft Cloud Support Services" is (**max 20 pages**) divided in the following 3 parts:

- o Overall Vision and Approach **(Max. 10 Points)**
- o Migration **(Max. 25 Points)**
- o Management and end-user support **(Max. 25 Points)**

Under the column "References" please provide the page reference(s) from your explanatory document.

9.1. Microsoft Cloud Support Services	**MAX POINTS:**	**60**	
9.1.1. Overall Vision and Approach	**MAX POINTS**	**10**	**REFERENCES**
Max. 10 Points	Describe your structural approach to achieving the requirements expressed in Annex A1, §3.6, explain in particular the contractual structure to be implemented.		
9.1.2. Migration	**MAX POINTS**	**25**	**REFERENCES**
Max. 25 Points	Describe your approach to migrating to O365/M365, in particular: • Identity Management • Exchange Server • File Share • O365 ProPlus (MSI vs. Click-to-Run)		
9.1.3. Management and end-user support	**MAX POINTS**	**25**	**REFERENCES**
Max. 25 Points	Describe your approach to the management and end-user support.		