



REALIZATION OF A RESEARCH AND
DEVELOPMENT PROJECT (PRE-COMMERCIAL
PROCUREMENT) ON "CLOUD FOR EUROPE"

TEMPLATE FOR
TECHNICAL OFFER

ANNEX III
TO THE CONTRACT NOTICE

TENDER NUMBER <5843932>
CUP <C58I13000210006>

CLOUD FOR EUROPE

FP7-610650



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1 GENERAL INSTRUCTIONS

The present template (sections 2 to 9) can be used by Tenderers to describe their technical offer for the execution of the selected Lot - Phase I of the Cloud for Europe tender.

1.1 IDENTIFICATION OF THE LOT AND APPLICABLE TECHNICAL SPECIFICATIONS

This pre-commercial procurement procedure is divided into 3 (three) lots, listed in the following. Tenderers shall clearly identify the Lot the Technical offer refers to.

- **LOT 1: "Federated Certified Service Brokerage (FCSB)" – CIG: 6027774476**
- **LOT 2: "Secure, Legislation – Aware Storage (SLAS)" – CIG: 6027802B8F**
- **LOT 3: "Legislation Execution (LE)" – CIG: 602781022C**

Technical specifications for the whole Tender are described in the following five documents:

- Annex IV a - Challenges and General Requirements
- Annex IV b - Federated Certified Service Brokerage of EU Public Administration Cloud
- Annex IV c - Secure Legislation-Aware Storage Solution
- Annex IV d – Legislation Execution Cloud Services
- Annex IV e - Abbreviations and Glossary

Please note that Annex IV a and IV e apply to all the Lots, Annex IV b applies only to Lot 1, Annex IV c applies only to Lot 2 and Annex IV d applies only to Lot 3.

1.2 QUESTIONNAIRE

Following questions are part of the tender: tenderers should give an answer to the questions in the Technical Offer using the present Template. The answers contained in the technical offer will be used to evaluate the offers according to the criteria described in the Tender Regulation.

These questions are generic and will re-appear in the subsequent Request for Proposals for the Phase II and Phase III.

ID	Suggested structure of the technical offer	Applicable Criteria	Length
Q-G1	Describe the solution to the challenge from following points of view: <ul style="list-style-type: none"> • Functional • Architecture • Running as a service (if applicable) 	Most	Max 4 pages

	<p>Explain clearly the fundamentals of the solution to each challenge in the Lot.</p> <p>Explain which functional requirements you expect to fulfill.</p>		
Q-C1	Explain why the proposed approach is likely to succeed in solving the main challenges for this lot	C1	Max 1 page
Q-C2	Explain why the proposal gives an overall contribution to realize the Usage scenario described in Section 1.4 of the "Annex IV(A): Challenges and general requirements	C2	Included in Q-C1
Q-C3	Explain to what degree the prototype and pilot will fulfill the challenge. What are the restrictions, which of the required functional requirements you expect will be missing in phase 2 and 3?	C3	Max 2 pages
Q-C4	Please explain the level of innovation and in what areas the proposed solution requires research.	C4	Max 1 page
Q-I1	Please explain to which extent the proposed solution can have a larger impact on (digital) society in Europe. Does the service or underlying technology have multiplication effects in other areas?	I1	Max 1 page
Q-I2	Explain how the solution can have a positive impact on the adoption of cloud services by governments.	I2	Max 15 lines
Q-I3	Explain how the proposed solution can enhance the public sector services (cost, functionality, ease of use, ...)	I3	Max 1 page
Q-I4	<p>Commercialization plan and exploitation of Intellectual Property Rights.</p> <p>Pre-Commercial Procurement expect that the project will not end with the development of a prototype and pilot. If the prototyping phases and piloting phases are successful, EU and</p>	I4	Max 2 pages

	<p>procurers expect that the IPR will be exploited by the bidder and that new business or markets will be created.</p> <p>Please document the current vision regarding commercialization and the protection and exploitation of the IPR.</p> <p>See also the description of criterion I4</p>		
Q-I5	<p>Risk and benefit sharing: Please explain your proposal for sharing of risk and benefits with the Contracting Authorities (procurers)</p> <p>What compensation will procurers (and other government agencies) receive as a compensation for the research funding. Examples: (just suggestions, other proposals may be better)</p> <p>License cost reduction for procurers/partners for future products derived from the IPR</p> <p>Sharing of IPR with procurers (so that governments are allowed to use the IPR in their own internal projects)</p>	P3	Max 2 pages
Q-S1	<p>Please give a brief Risk Impact Analysis for Confidentiality, Integrity and Availability breaches of the proposed solution.</p> <p>Please make also a brief assessment of the RPO (Recovery Point Objective) and RTO (Recovery Time Objective) objectives that should be reached for the service/solution in production (this is not a commitment that the prototype or pilot will achieve this).</p> <p>For a more detailed description, we refer to the description of criterion S1.</p>	S1	Max 1 page
Q-S2	<p>Phase1: Please explain how the risk analysis for the project and the resulting solution will be done. An initial risk analysis in the bid is an additional advantage.</p> <p>See also description of the corresponding criterion S1.</p> <p>For phase2 and especially for phase3 an outline for the risk analysis must already be part of the bid.</p>	S2	<p>Phase 1: Max 2 pages</p> <p>A more detailed description will be required in the phase1 and phase3 RFP's</p>

Q-S3	<p>Describe the risk mitigation measures.</p> <p>For the risks identified in S2, explain which countermeasures will be taken (both project and service related risks).</p> <p>For phase1, this answer can be brief or focus on the methodology that will be used.</p> <p>For phase2 and phase3, the most important measures must already be described in the bid.</p>	S3, S4	<p>Phase 1: Max 2 pages</p> <p>A more detailed description will be required in the phase1 and phase3 RFP's</p>
Q-S4	<p>Explain how the solution management interfaces and networks and their underlying infrastructure are protected (if applicable)</p> <p>See also description of criterion S4</p>	S4	<p>Phase1 RFP: not applicable</p> <p>Phase2 and Phase3 RFP's: Max 2 pages</p>
Q-S5	<p>Describe the planned operational security measures, proposed certifications (for the service or for the underlying infrastructure layers) foreseen for the piloting phase.</p>	S5	<p>Phase1 RFP: Max 1 page.</p> <p>Phase2, Phase3 RFP's: Max 3 pages</p>
Q-Q1	<p>See also the description of criterion Q1: Please explain how lock-in can be avoided. Describe the portability and applicability in different architectures. Can other cloud providers implement a compatible service?</p>	Q1	Max 2 pages
Q-Q2	<p>Please make sure that the bid document is easy to read and to the point.</p> <p>Please mark and list all areas of unclear compliance with the tender specs and mark and list areas where own interpretations have been made with the tender specs (because the spec was not clear)</p>	Q2	Max 1 page
Q-Q3	<p>Please provide a short overview of project plan/approach, planned resource allocation, proposed acceptance test plan for prototype and pilot.</p> <p>See also IEEE: the following subjects also can be considered: reviews, problem reporting and corrective actions, risk</p>	Q3 AC	Max 2 pages

	<p>management [IEEE730].</p> <p>Important: See also description of criterion Q3</p>		
Q-Q4	<p>Alignment with EU standards and legislation.</p> <p>Illustrate how the solution is compliant with EU standards and legislation (security, data protection, ...). Is the solution compliant with the legislation of the procuring member states? (assuming the solution processes government and citizen data)</p>	Q4	Max 2 pages
Q-Q5	<p>Resilience and target service SLA. See also description of criterion Q5.</p> <p>Please describe the final SLA that could be offered. What will be available in the pilot phase?</p> <p>Do not only focus on availability, but also on incident response time, service desk related KPI's, ...</p> <p>Please also address reliability, i.e. ability to keep functioning under specific use over a specific period (may split into maturity, fault tolerance, and recoverability) [ISO25010]</p>	Q5	<p>Max 4 pages</p> <p>This question DOES NOT NEED to be answered in the phase1 RFP</p>
Q-Q6	<p>Scope of the proposed prototypes and pilot. Please describe the scope (completeness, limitations) of the prototypes (phase2) and pilot (phase3) in comparison to a future full production service implementation of the challenge.</p> <p>This includes all functionality sub-characteristics as adequacy, accuracy, interoperability, correctness and security [ISO25010].</p> <p>Describe the bidder intentions to further develop a related service/product based on the experience gained by the PCP</p> <p>Please be realistic</p>	Q6	Max 2 pages
Q-Q7	<p>See also description of criterion Q7. Please document the early/continuous quality assurance measures that will be put in place...</p> <p>A key issue is maintainability that is described by analyzability, changeability, stability, and testability. [ISO25010]</p>	Q7	Max 1 page
Q-Q8	Performance and end-user experience.	Q8	This question DOES NOT NEED to be

	<p>Document how performance and end-user experience will be optimized during design and later operations.</p> <p>It can also addresses aspects of usability (understandability, attractiveness) and efficiency (required time, consumption of resources) [ISO25010].</p>		answered in the phase1 RFP
Q-AC	<p>Describe the minimum effort and obligation of result commitments for the current tender phase.</p> <p>*Be careful with obligation of result commitments beyond the functionality marked as required in the tender. PCP is all about research and innovation so guaranteed results are not always reachable.</p> <p>The minimum effort and obligation of results declared in the Technical offer will be used as the basis to determine if the work fulfills the requirements, in order to allow payments for phase 1.</p> <p>Giving obligation of results commitments must therefore be done with care, since the bidder may not pass the acceptance criteria.</p>	<p>AC1</p> <p>AC2</p> <p>AC3</p> <p>Q2</p>	Max 2 pages

1.3 RIGHT TO ACCESS TO THE TECHNICAL OFFER

In relation to the right of access to documents provided by articles 13 and 79, sub-sections 5-quarter of the Italian Code of public contract, where the information indicated in the technical offer and as justification of the same offer, constitute technical or commercial secrets, the tenderer shall give punctual evidence of such information, with a motivated and proven declaration of access.

In case the tenderer would not produce such declaration, or in case such declaration was not motivated nor proven, AGID will be released from the obligation of notification of any request of access pursuant to article 3 of DPR no. 184/2006. Furthermore, in the absence of such declaration, the technical offer will be considered fully accessible.

1.4 OTHER INSTRUCTIONS

Tenderers should print on both of each sheet and may use A3 paper in lieu of A4, but each A3 sheet will be counted as two A4 sheets. Text must be presented in "Segoe UI" font or equivalent and be no smaller than 10 point, single-spaced with the margins set at 2.5cm.

If the Tender exceeds the page limit then all words and / or pages in excess of the specified limit will not be considered further.

If Tenderers consider that the page limit is insufficient to provide the information required by these instructions then a tender question should be raised. No guarantee can be given that the page limit will be increased.

2 GENERAL SECTION

2.1 IDENTIFICATION OF THE TENDERER AND LOT

Please identify the main tenderer and or the partners submitting the proposal as a collectively suitable economic operator. Add lines if needed.

<i>Participant no.</i>	<i>Participant organization name</i>	<i>Participant short name</i>	<i>Country</i>

2.2 IDENTIFICATION OF THE LOT

The present Technical offer refers to the following Lot of the tender (please check only one Lot)

- LOT 1: "Federated Certified Service Brokerage (FCSB)"
- LOT 2: "Secure, Legislation – Aware Storage (SLAS)"
- LOT 3: "Legislation Execution (LE)"

2.3 IDENTIFICATION OF THE VARIATIONS (LOT 3)

As explained in the Tender Regulation, Lot 3 identifies three variations. A variation is a combination of options from which the bidders may choose. It is admissible to present offers that address all requirements of one, two or all variations, in any combination. The three admitted variations are described in section 1.3 of Annex IV(D) of the Tender Documents.

The present Technical offer refers to the Lot 3 and to the following variations (check one or more of the variations of the solution described in the present Technical Offer)

- LOT 3: Framework
- LOT 3: Generic Legislation Execution
- LOT 3: Legislation Execution

3 EXECUTIVE SUMMARY

The **executive summary** should, at a glance, provide the reader with a clear understanding of the objectives of the proposal, how they will be achieved, and their relevance to the Call for tender. [max 1 page]

4 GENERAL DESCRIPTION OF THE SOLUTION

Describe the solution to the challenge [max 4 pages]

5 SOLUTION TO THE CHALLENGES

5.1 Q-C1 POINT OF STRENGTHS OF THE PROPOSED SOLUTION

Explain why the proposed approach is likely to succeed in solving the main challenges for the lot. Explain why the proposal gives an overall contribution to realize the Usage scenario described in Section 1.4 of the "Annex IV(A): Challenges and general requirements [max 4 pages].

5.2 Q-C3 EXPECTED FUNCTIONALITIES OF THE PROTOTYPE AND PILOTS

Explain why the proposed approach is likely to succeed in solving the main challenges for this lot [max 1 page]

5.3 Q-C4 LEVEL OF INNOVATION

Explain the level of innovation and in what areas the proposed solution requires research [max 1 page]

6 IMPACT

6.1 Q-I1: IMPACT ON DIGITAL SOCIETY IN EUROPE

Explain to which extent the proposed solution can have a larger impact on (digital) society in Europe. Does the service or underlying technology have multiplication effects in other areas? [max 1 page]

6.2 Q-I2: IMPACT ON THE ADOPTION OF CLOUD SERVICES BY GOVERNMENT

Explain how the solution can have a positive impact on the adoption of cloud services by governments [max 15 lines]

6.3 Q-I3: IMPACT ON PUBLIC SECTOR SERVICES

Explain how the proposed solution can enhance the public sector services (cost, functionality, ease of use, ...) [max 1 page].

6.4 Q-I4 COMMERCIALIZATION AND EXPLOITATION OF THE IPR

Commercialization plan and exploitation of Intellectual Property Rights [max 2 pages].

6.5 Q-I5: RISK AND BENEFIT SHARING WITH THE CONTRACTING AUTHORITIES

Explain your proposal for sharing of risk and benefits with the Contracting Authorities (procurers) [max 2 pages].

7 SECURITY

7.1 Q-S1: RISK IMPACT ANALYSIS FOR CONFIDENTIALITY, INTEGRITY AND AVAILABILITY BREACHES

Give a brief Risk Impact Analysis for Confidentiality, Integrity and Availability breaches of the proposed solution.

Make also a brief assessment of the RPO (Recovery Point Objective) and RTO (Recovery Time Objective) objectives that should be reached for the service/solution in production (this is not a commitment that the prototype or pilot will achieve this) [max 1 page].

7.2 Q-S2: RISK ANALYSIS FOR THE PROJECT

Explain how the risk analysis for the project and the resulting solution will be done. An initial risk analysis in the bid is an additional advantage [max 2 pages].

7.3 Q-S3: RISK MITIGATION MEASURES

Describe the risk mitigation measures.

For the risks identified in S2, explain which countermeasures will be taken (both project and service related risks). This answer can be brief or focus on the methodology that will be used [max 2 pages].

7.4 Q-S5: PLANNED OPERATIONAL SECURITY MEASURES

Describe the planned operational security measures, proposed certifications (for the service or for the underlying infrastructure layers) foreseen for the piloting [max 1 page].

8 QUALITY

8.1 Q-Q1: AVOIDING LOCK-IN: PORTABILITY AND COMPATIBILITY

Explain how lock-in can be avoided. Describe the portability and applicability in different architectures. Can other cloud providers implement a compatible service? [max 2 pages]

8.2 Q-Q2: AREAS OF UNCLEAR COMPLIANCE WITH THE TENDER SPECIFICATIONS

*Make sure that the bid document is easy to read and to the point.
Mark and list all areas of unclear compliance with the tender specs and mark and list areas where own interpretations have been made with the tender specs (because the spec was not clear) [max 1 page].*

8.3 Q-Q3: OVERVIEW OF PROJECT PLAN

Provide a short overview of project plan/approach, planned resource allocation, proposed acceptance test plan for prototype and pilot.

See also IEEE: the following subjects also can be considered: reviews, problem reporting and corrective actions, risk management [IEEE730] [max 2 pages].

8.4 Q-Q4: ALIGNMENT WITH EU STANDARDS AND LEGISLATION

Alignment with EU standards and legislation.

Illustrate how the solution is compliant with EU standards and legislation (security, data protection, ...). Is the solution compliant with the legislation of the procuring member states? (assuming the solution processes government and citizen data) [max 2 pages].

8.5 Q-Q6: SCOPE OF THE PROPOSED PROTOTYPES AND PILOT.

Scope of the proposed prototypes and pilot. Describe the scope (completeness, limitations) of the prototypes (phase2) and pilot (phase3) in comparison to a future full production service implementation of the challenge. This includes all functionality sub-characteristics as adequacy, accuracy, interoperability, correctness and security [ISO25010].

Describe the bidder intentions to further develop a related service/product based on the experience gained by the PCP,(Please be realistic) [max 2 pages].

8.6 Q-Q7: QUALITY ASSURANCE MEASURES

Document the early/continuous quality assurance measures that will be put in place...

A key issue is maintainability that is described by analysability, changeability, stability, and testability [ISO25010] [max 1 page].

9 MINIMUM EFFORT AND OBLIGATION OF RESULT COMMITMENTS

Describe the minimum effort and obligation of result commitments for the current tender phase [max 2 pages]

Be careful with obligation of result commitments beyond the functionality marked as required in the tender. PCP is all about research and innovation so guaranteed results are not always reachable.

The minimum effort and obligation of results declared in the Technical offer will be used as the basis to determine if the work fulfills the requirements, in order to allow payments for phase 1.

Giving obligation of results commitments must therefore be done with care, since the bidder may not pass the acceptance criteria.