



Tender document

Public European Tender

Research Information System (RIS)

Colophon

Issued by: Fontys Education and Research department & Fontys Finance and Procurement
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Acquisition resulting from this tender is not appreciated.

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Definitions

This Tender Document makes use of the following terms, which are written with a capital letter. The terms defined below may be used in both singular and plural form.

Award criterion:	The criterion applicable in determining best price-quality ratio (BPQR), lowest cost based on cost-effectiveness or lowest price (LP).
Bid:	An offer validly submitted by a Bidder in response to the Tender Document provided by the Contracting Authority.
Bidder:	The legal entity participating in the tender, either independently or in a Combination.
Client:	The Contracting Authority that awarded the contract.
Combination:	Two or more companies jointly submitting a Bid (tender offer).
Concern:	Economic association of legally independent companies under common central management, with joint results reflected in the balance sheet for the concern.
Contracting Authority:	Stichting Fontys (Fontys Foundation), having its registered office in Eindhoven.
Contract:	The written commitment for consideration between the Client and the Contractor, as set out in Appendix 1.
Contractor:	The Bidder to whom the contract has been awarded.
Coordinator:	The legal entity that is in charge of a Combination and may act as a responsible agent towards the Contracting Authority.
E&R:	Fontys Education & Research Department.
ESPD:	Abbreviation for: European Single Procurement Document. A declaration as referred to in Article 2.84 of the Public Procurement Act 2012.
Exclusion:	Rejection of a Bid on the grounds of a knock-out criterion or failure to meet any other requirement to which this sanction applies.
FIP:	Fontys Integration Platform
Grounds for Exclusion:	The grounds relating to the personal situation of the Bidder as stated in the Public Procurement Act 2012, to be used as a basis for Exclusion of the Bid.
Information Memorandum:	Memorandum containing the answers to questions asked by (potential) Bidders, during the tendering period, as well as clarifications issued by the Contracting Authority of its own accord.
Public Procurement Act 2012:	Legislation adopted on 1 November 2012, containing new rules on procurement, text in force from 2 March 2022, cited as the Public Procurement Act 2012.
RIS:	Research Information System
Schedule of Requirements:	The specifications with which the performance to be delivered (service and/or supply and/or work) must comply at the time of delivery or acceptance.
Subcontractor:	An entrepreneur to whom part of the execution of an assignment has been or will be given by the Contractor.
Suitability requirement:	The requirement that concerns the suitability of the Bidder being a requirement in terms of their financial and economic standing, professional and/or technical capability.
Tender Document:	The Invitation to Tender, including the appendices, drawn up by the Contracting Authority for the purpose of the Tender Procedure, which contains all information and conditions as well as the requirements and Award Criteria for the Tender to win — and eventually perform — a public contract.
Tender Procedure:	The process consisting of a number of formal steps to arrive at the award of the contract to the Bidder with the best price-quality ratio (BPQR), lowest cost based on cost-effectiveness or lowest price (LP).
Third party:	The legal entity that the Bidder relies on for the purposes of the Tender (in terms of financial and economic standing, professional and/or technical capability) or wishes to use in the performance of the Contract.

Working days:	Calendar days excluding weekends and public holidays generally recognised in the Netherlands within the meaning of the General Terms Act.
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1. Introduction

The present Tender Document contains all information about the Public European Tender for a Research Information System.

All businesses that meet the minimum requirements are invited to submit a Bid. This can be done independently or in a Combination formation and potentially by using Third Parties.

The Tender Procedure must result in the award of the contract to the Bidder who has submitted the Offer with the best price-quality ratio (BPQR).

1.1. Choice of Tender Procedure

The Public Procurement Act 2012 applies to this tender. As the European threshold amount is expected to be exceeded, and no statutory exceptions apply, a European tender must be conducted. The decision was made to put this contract out to European tender through the so-called Public European Tender Procedure. This choice is based primarily on the number of expected Bidders.

1.2. Digital tendering via TenderNed

The announcement of this contract has been published on www.tenderned.nl and in the Supplement to the Official Journal of the European Union (T.E.D.).

The entire tender will be conducted digitally via TenderNed. This means that potential Bidders can download the necessary documents (including the Tender Document) via the website. Publication of the Information Memo(s) and the announcement of the awarded contract will take place on TenderNed as well. Please note that it is advisable to set up notifications on TenderNed (green button) so that you will automatically receive a notification when new documents have been published. To ask questions and submit a Bid, you must first create an account on TenderNed and be able to use E-recognition. For more information on how TenderNed works, see: www.tenderned.nl/cms/handleidingen/handleiding-tenderned-voor-ondernemingen

1.3. Contact during the Tender Procedure

All correspondence in connection with this tender will take place via TenderNed. If this is not possible for technical reasons, please contact inkoop@fontys.nl. Bidders themselves are responsible for verifying whether their email messages have been received (on time) by the Contracting Authority.

The contact person for this tender is:

Name:	Miriam Hoefmans
Phone number:	088-508-2704
Email address:	inkoop@fontys.nl

Under penalty of Exclusion, it is not permitted to contact the Contracting Authority in the context of this tender in any way, in order to obtain any information whatsoever, other than via the stated contact person or individual acting in their stead. Bidder therefore also respects Contracting Authority's code of ethics regarding procurement, see <https://fontys.nl/Over-Fontys/Inkoop/Inkoopbeleid.htm>.

1.4. Timetable

At several points during a Tender Procedure, potential Bidders must carry out certain timely actions. The Contracting Authority strives to adhere to the following schedule. Contracting Authority is entitled to adjust this timeline in the interim. If the schedule below differs from the schedule in TenderNed, TenderNed will always prevail.

Activity	Date	Time (C.E.T.)
Tender publication date	8 May 2024	
1 st Deadline to report inconsistencies in tender document and closing date for written questions	27 May 2024	10:00
1 st Deadline for replying to questions by means of latest Information Memorandum	3 June 2024	
2 nd Deadline to report inconsistencies in tender document and closing date for written questions	10 June 2024	10:00
2 nd Deadline for replying to questions by latest Information Memorandum	14 June 2024	
Deadline for submission of Bids	27 June 2024	10:00
Opening of 'safe'	27 June 2024	
Evaluation of Bids	27 June 2024 - 19 July 2024	
Evaluation sub-award User Experience (via MS teams) <i>The Bidder must be available online upon request.</i>	2 July 2024	
Demonstration sub-awards Use cases, RIS-functionalities, Research portal (via MS teams) <i>The scheduled demo times (via MS teams) will be announced as soon as possible after the deadline for submitting Bids. Bidder must ensure availability between 09:00 and 17:00 CET on all listed days.</i>	3 July, 4 July, 8 July 2024	
Target date for intention to award	19 August 2024	
Target date for final award	9 September 2024	
Effective date of Contract + start of implementation	Date of final award	

2. The Contracting Authority

2.1. Fontys University of Applied Sciences

Fontys University of Applied Sciences, hereafter Fontys, is one of the largest higher education institutions in the Netherlands, with more than 4,300 employees and almost 42,000 students. It includes 23 institutes offering Bachelor's degree programmes in full-time, part-time, dual and in-service variants, as well as Master's programmes and Associate degrees. Fontys also provides various courses and training programmes. Apart from education, Fontys focuses on research, knowledge innovation and contract activities — including in its 42 lectorates. The degree programmes are spread across a number of locations in the Netherlands, mainly concentrated in the south of the country (e.g. Eindhoven, Tilburg and Venlo).

Fontys is a foundation. The Executive Board comprises the competent authority and functions as a unit responsible for results under the Supervisory Board. The core tasks of the 23 institutes are teaching and research, each in its own market segment. Like the contract activities carried out by the institutes, research is aimed at strengthening teaching and knowledge valorisation. Lastly, seven service units perform support activities at Fontys. These are HR & Organisation, Student Facilities, Finance & Procurement, Marketing, Communication & PR, Education & Research, Information & Technology and Property & Facilities.

For more information about Fontys, please visit our website: <https://fontys.nl>

2.2. Fontys Education & Research Department

Contract formation and contract management for research information system(s) occurs within Fontys Education & Research Department (hereinafter referred to as E&R).

E&R wants to be the natural partner for teachers, employees and management of Fontys in realising education and research ambitions. It does so by supplying knowledge and support in the field of education, research, impact and quality assurance from a Fontys-wide perspective—always with society, the professional field and student in mind. We are developing the new ways of service, in line with the growing attention for regionalization, flexibility, cooperation in education and research and the current development phase of the Fontys organization, characterised by 'from numbers to values'. With this course of action we are strengthening our services in the areas of:

- Strategy and policy development and advice for the board of directors, services and the institutes of Fontys.
- Support for complex and multidisciplinary innovation and improvement processes.
- Process guidance in the development and realisation of cross-institute ambitions and collaborative initiatives.

The following areas of expertise are part of the E&R department:

Research, Educational Development, Quality Management, Internationalisation and Legal Affairs.

2.3. Our social mission

'Development' is incontrovertibly a core concept within Fontys. Young people develop their talents as students in our programmes, where we develop relevant practical knowledge. Working professionals can pursue life-long learning and development at Fontys alongside their jobs. For our part, we respond flexibly to radical social developments, and — last but not least — we develop ourselves by sharing knowledge and skills within our community. Only in this way can our students, professionals and graduates continue to make a meaningful contribution to society.

We operate at the heart of society. In so-called hybrid learning and research environments, students, lecturers, researchers and the professional field work together across borders — and as a result, both teaching and research and learning and working become increasingly intertwined. Our main 'social value' is therefore the development of talent and knowledge.

Fontys is a multidisciplinary university of applied sciences in the south of the Netherlands. Together with and for the professional field, both national and regional, we provide high-quality higher professional education and conduct innovative practice-based research. In this way, we contribute to the vigorous development of a vital, inclusive and sustainable society. See also: [Fontys for society](#)

3. The assignment

3.1. Description of the assignment

3.1.1. Background

Practice-based research at Fontys focuses on social issues and contributes to innovation in the professional world. This practice-based research is organised within lectorates, centres of expertise and knowledge centres, and is carried out together with partners from the professional field and fellow educational institutions. Using six knowledge themes, Fontys connects with regional knowledge networks and focus on the development of Fontys into a knowledge-intensive network organisation.

Fontys currently lacks a system as well as a structure to register research information centrally. Research information comprises metadata regarding e.g. knowledge themes, researcher and department profiles, events, output, facilities and other indicators. In contrast to scientific research (which is often focused on published articles in scientific journals), practice-based research can lead to a wide variety of outcomes. Fig. 1 visualises these research information components.

In absence of a research information system, Fontys is currently unable to effectively record and analyse research information. Being able to uniform register and use research information is deemed essential for a wide range of reporting, marketing and quality assurance purposes.



Figure 1 Research information components

3.1.2. Vision of the future situation

Fontys envisions a broad-based, user-friendly research information system that facilitates our research organisation in registering research information effectively through the same application and in the same manner across the organisation. This will lead to accurate, up-to-date and reusable research information, which will be used for multiple (internal and external) purposes. The availability and (reporting) usability of this information will empower Fontys to:

- Support quality assurance through quality indicators
- Increase the visibility of Fontys' research activities and outcome to the outside world
- Improve research policy and research support
- Report on research activities and output on different organisation levels

3.1.3. Objective of the assignment

The purpose of this tender is to contract one party or a partnership to deliver, implement and manage a SAAS ICT solution for a "Research Information System" for Fontys. In order to enable Fontys to realise our ambitions and goals described in the previous paragraphs.

By Software as a Service, we mean a commercially available public-cloud application that is (already) used by multiple customers, with technical management and maintenance being done by the Contractor.

The Contractor is and remains responsible for carrying out the entire assignment from implementation to exit.

3.1.4. Size and scope of the assignment

Fontys' research organisation currently comprises of approximately 600 researchers, most of which are also (predominantly) teachers. They are supported by approximately 60 research assistants and a research support team at E&R (approximately 20 policy and support staff). There are 10 centres of expertise/knowledge centres divided over 6 knowledge themes, each led by a leading lector, managing director of the business unit and a research manager. These centres facilitating multi-disciplinary collaboration of Fontys' 43 lectorates lead by 48 lectors (the higher education equivalent of professors). These lectorates are home to 600 researches and are formally positioned within one of the 23 business units, depending on their research focus. Lectorates can be affiliated with multiple centres of expertise/knowledge center on different levels.

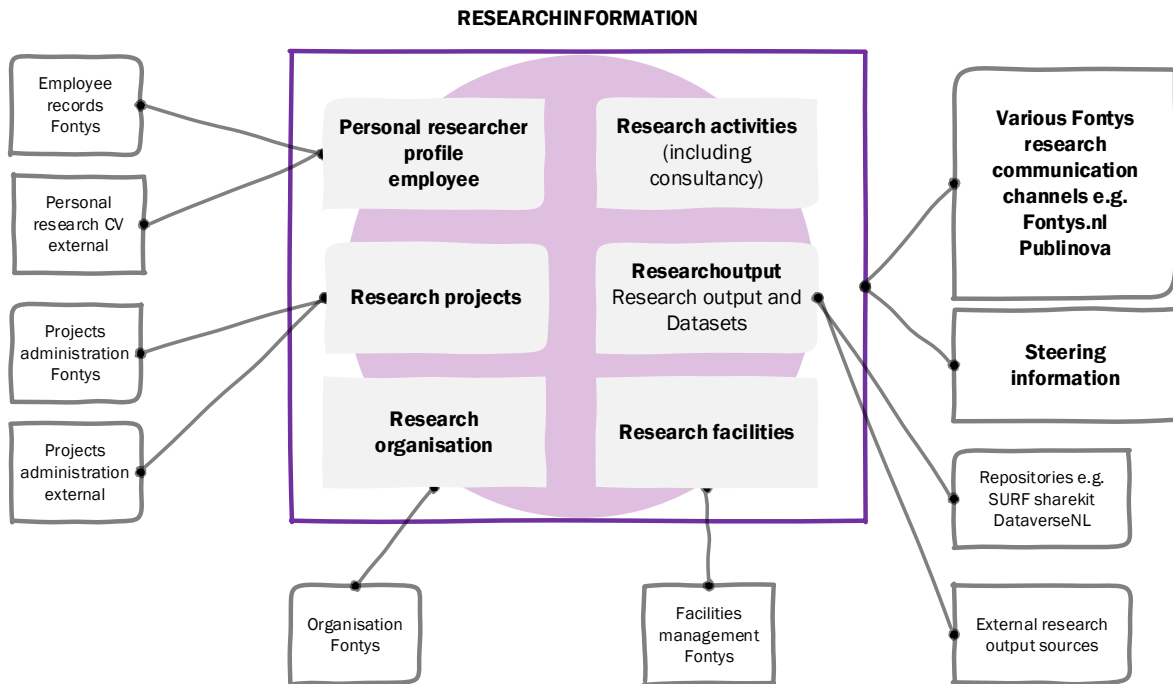
This requires an integrated (interlinked) view of research information, on outlines information on:

- the researcher (personal researcher profile)
- the research organisation, hierarchical and non-hierarchical (research organisation unit profile). Concerning hierarchical units such as lectorates (professorship) and non-hierarchical units such as centres of expertise/knowledge centres.
- research projects,
- research output and datasets (such as publications, prototypes)
- activities related to research (such as events, participation in panels),
- research facilities (such as labs, machines)

In addition to the research information described, the research information system (RIS) needs to provide the functional requirements described in chapter 8. See figure 2 below for a visual representation of the main functions required.

A key succesfactor of the RIS is the availability of a research portal, integrations with the Fontys website and Publinova to enable Fontys to make Fontys' research visible to the outside world. The research portal provides an integral view for the public of all research information that is made publicly available. In order to facilitate researchers the RIS supports the interfaces as described in more detail in paragraph 3.1.7 Interfaces. With regard to the research portal (module), the Client reserves the right to cancel it at any time, subject to three (3) months' notice.

The Contractor will take all necessary action to deliver, implement and manage the RIS in accordance with the demands set out in this document.



Figuur 2 Research Information scope outline

Out of scope of this project and tender respectively are:

- the processes pre- and post-grant application;
- the storage of research data during and after a research project;
- the storage of research output; this will be stored in the Fontys institutional repository (except for a temporary storage needed to transfer the files to the institutional repository);
- facilitating programme or project management and project execution (except the necessary support that is required to facilitate the implementation of the RIS);
- processes and systems relating to relationship management, collaboration and consortium formation;

Additional, more detailed information on the assignment is included in the appendices to this Tender Document. The Contract, attached as Appendix 1, sets out administrative conditions, implementation conditions and preconditions relating to the execution of the Contract.

3.1.5. Implementation

The Contractor is responsible for implementing the RIS within Fontys in accordance with the implementation plan. Within one week after final award the Contractor will provide Fontys a tailored implementation plan (including the requirements set out in the contract and this tender document) for joint evaluation. After joint review of the implementation plan both parties will agree upon a final version of the implementation plan.

Additional requirements to be included:

- During the full implementation the Contractor assigns a project lead that is responsible for managing all the Contractors' responsibilities and is the first point of contact for the Fontys project manager and implementation manager.
- During the full implementation the Contractor has a capable support team directly available for the Fontys project team. All members of the support team are proficient in both spoken and written English and/or Dutch.
- The Contractors' project lead will report to the Fontys project manager at least once a month. The exact timing is to be jointly decided upon and is registered in the implementation plan.
- The Contractors' implementation support team will meet the Fontys project team at Fontys for at least twice during the implementation for at least one full working day. These on-site meetings both teams will invest in our partnership and collaboration. Costs related to on-site meetings are to be included in the one-off costs.

3.1.6. Milestones

Fontys has planned the following high-level schedule for the set-up and user implementation of the ICT solution, see figure 3 and details in the table per phase. The exact planning within the phases is to be jointly agreed upon in the implementation plan.

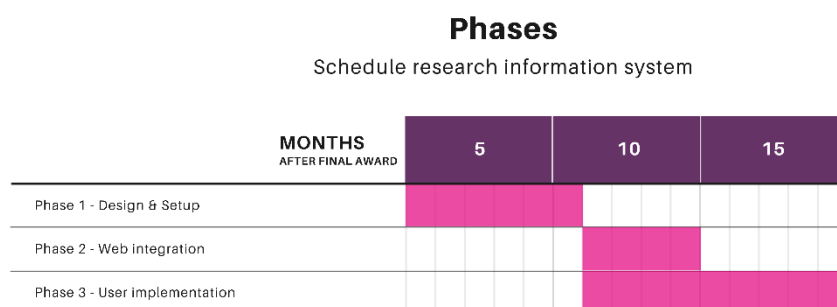


Figure 3 Phases - schedule Research Information System

Phase 1 – Design & Setup

After GO-live of the design & setup phase the RIS is fully operational and available for users including the research portal.

Description	Acceptance	Delivery date
- Planning & design - System set-up - Integrations (phase 1) - Testing of the ICT solution (integration and user acceptance test) - Training & Instruction - Pilot of the set-up	- Validation milestones implementation plan signed off - Issues categorised and improvement measures signed off (no blocking issues from tests and pilot and workarounds approved) - Training & instruction signed off	6 months after final award (or earlier if possible) = GO live phase 1

Phase 2 – Web integration

The web integration phase adds additional interfaces to the operational RIS (see paragraph interfaces).

Description	Acceptance	Delivery date
- Integrations (phase 2) - Testing of the ICT solution (end-to-end, integration and user acceptance test)	- Validation milestones implementation plan signed off - Issues categorised and improvement measures signed off (no blocking issues from tests and workarounds approved)	4 months after GO live phase 1 (or earlier if possible) = GO live phase 2

Phase 3 – User implementation

The user implementation phase is carried out by Fontys, the Contractor ensures that a support team is available for user implementation support questions and after care.

Description	Acceptance	Delivery date
- User implementation - After care - Final handover to support organisation Fontys	- Final handover to support organisation Fontys	15 months after final award (or earlier if possible)

3.1.7. Interfaces

All data links that run via the Contractor's APIs go via Fontys Integration Platform (FIP) to the applications in use by Fontys. This will be realized under the direction of Fontys. The Contractor is responsible for the contribution of knowledge and expertise and any modifications to its own application in the actual realization thereof.

Exceptions to this are the applications that may/must be directly connected by the Contractor.

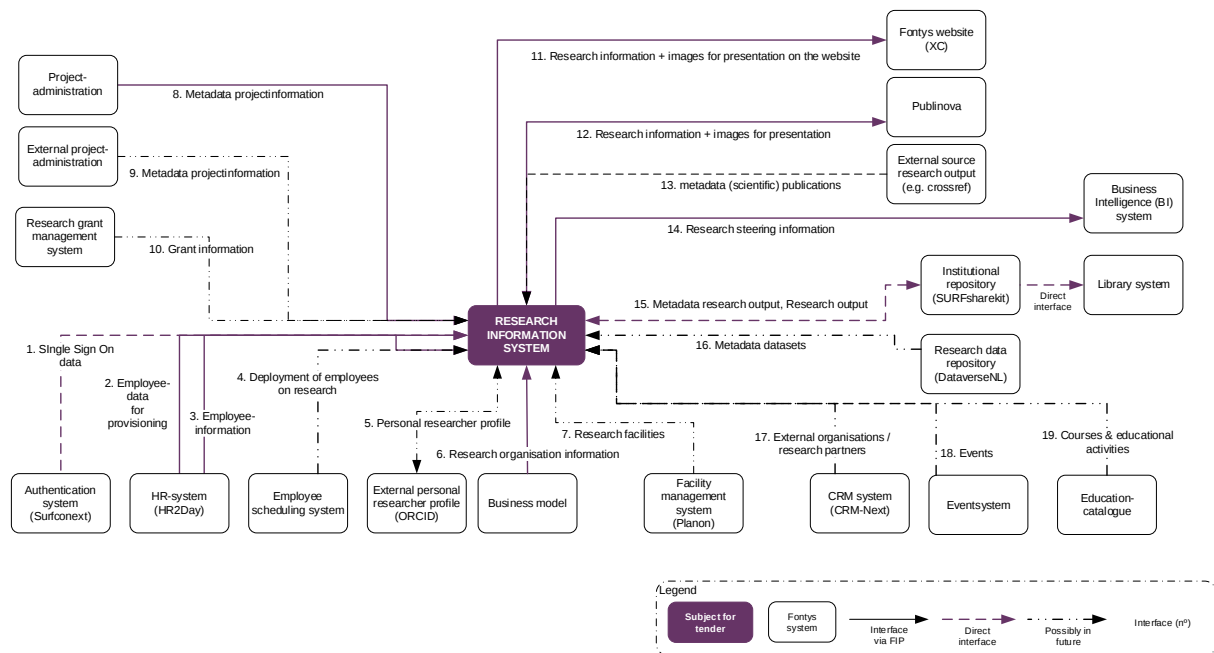


Figure 4 Interfaces research information (also enclosed in appendix 4).

No	Interfacing of data	Information regarding the application to be linked	Details of interface data	Delivery lead	Phase
1	Surf Conext	Providing single sign on for cloud services	Authentication and Single Sign On via Surf Conext.	Contractor	1
2/3	HR2Day	Fontys HR system	Provisioning of employees as users of the application and data source for metadata regarding Fontys employees (note: the HR-system does not differentiate between lecturer and researcher).	Fontys (FIP)	1
4	Employee scheduling system	N/A	Researcher role information.	N/A	OOS
5	ORCID	ORCID database	ORCID data integration.	N/A	OOS
6	Business model application	Registration of the Fontys business model.	The research organisation as defined in Fontys business model (eg. Business units, departments).	Fontys	1
7	Planon	Planon supports Fontys in managing manage buildings, infrastructure and facilities.	Research facilities from the facility management system (not currently recorded)	N/A	OOS
8	Unit4ERP/PLC	Unit4ERP is our financial system, including project life cycle where research project managers manage the project finances.	Research project information (name, start & enddate etc.)	Fontys (FIP)	1
9	External source research projects	Not currently available	Research project information from an external database (e.g. via RAID).	N/A	OOS
10	Grant management system	Not currently available	Grant information (e.g. funding code, a grant provider, grant programme and grant scheme)	N/A	OOS
11	Fontys website (XC)	XperienCentral is the Fontys' website content engine (CMS)	Providing research information / metadata to be presented on the Fontys website. The research information system will be the main source for research related pages.	Fontys (FIP)	2
12	Publinova	Publinova is the national platform that makes practice-	Providing all publically available research information for publication on publinova.	Fontys (FIP)	2

		based research findable and visible to all.			
13	External source research output	The Fontys library has licences to e.g. Worldcat and several journals. Fontys does not have subscriptions to databases such as Scopus.	Publication metadata from external databases (no licence needed) and/or Worldcat.	Contractor	1
14	Business Intelligence (BI) system	Combination of MS Azure cloud and MS powerBI	Combination of management / steering information from several sources.	Fontys (FIP)	2
15	SURFsharekit	Fontys institutional repository, currently output is uploaded directly in the repository. SURFsharekit is based on DIDL/MODS.	Submit metadata of research output and the research output itself. Metadata from SURFsharekit to the research information system and research output including metadata from the research information system to SURFsharekit. The library system is 'fed' with data from SURFsharekit.	Contractor	1
16	Dataverse NL	Fontys institutional repository for datasets.	Metadata of datasets and outcomes of research are supplied from DataverseNL, forseen manual upload of metadata sets by system admin or data steward.	N/A	OOS
17	CRM Next	Customer Relationship Management (CRM) system.	Data from external organisations / research partners is recorded in the CRM.	N/A	OOS
18	Events management system	N/A	Event information	N/A	OOS
19	Education catalogue	N/A	Overview of courses and educational activities	N/A	OOS

OOS: Automated interface is currently out of scope

3.1.8. Demarcation implementation

The full implementation is a responsibility of Fontys itself. The Contractor is expected to take responsibility for:

Designing and realising the system set-up of the RIS including contributing to the realisation of the integraion with other systems and training the key-players in the project. This in close cooperation with the Fontys project team. Distribution roughly as follows:

No.	Topic	Principal	Contribution
1	Design/Blueprint	Contractor	Fontys
2	System set-up	Contractor	Fontys
3	Links (direct)	Contractor	Fontys
4	Links (via FIP)	Fontys	Contractor
5	Integration & end-to-end testing	Fontys	Contractor
6	User Acceptance Testing	Fontys	Contractor
7	Study programmes	Fontys	Contractor
8	User implementation (incl. pilot)	Fontys	Contractor

Note:

- 1 Setting up a similar system is often preceded by a blueprint phase. This phase is then used by the Contractor to collect the specifications on the basis of which they can set up a first version of the system. The Contractor takes the lead and provides required format in which this will be recorded (to best practice of the Contractor).
- 2 The system will be set up by and under the responsibility of the Contractor. Fontys has a preference for an agile approach, whereby the final set-up is realised in a number of sprints. Functional acceptance tests are part of this process. Fontys will participate in these tests.
- 3 Interfaces (direct) as part of the RIS are set-up under responsibility by the Contractor, these interfaces include links to external sources for research output and the Fontys institutional repository. If a direct link to Publinova is available this is included as part of the direct interfaces.
- 4 Integrations to the Fontys Integration Platform are organised by Fontys in close cooperation with the Contractor. The Contractor is responsible for her part of the integration.
- 5 Prior to the final user acceptance test, a comprehensive integration and end-to-end test will be performed. This will test the entire chain and the already realised integrations. This will be organized by Fontys itself. The Contractor must provide support where necessary and is responsible for dealing with any issues arising for its part of the chain.
- 6 The user acceptance test will be a test of all functionalities by the testers selected by Fontys. This will be organised by Fontys itself. The Contractor must provide support where necessary and is responsible for dealing with any issues arising for its part of the chain.
- 7 Fontys assumes a train-the-trainer approach. The Contractor will provide initial training for the key users, functional administrators and any other testers in the Fontys project.
- 8 The user implementation is carried out by Fontys, training and support is provided to users (researchers and research supporters) to enable them to make the best use of the RIS. The Contractor ensures that a support team is available for user implementation support questions and after care.

3.1.9. Training and instruction

- The starting point of the assignment is to provide training according to the train-the-trainer principle. This means that the Contractor trains a group of key-users and functional administrators of the Client in such a way that they can independently train the other users. It is expected that between 20 and 35 users need to be trained during phase 1 of the project.
- From the start of the implementation a number of key-users and functional administrators are trained in the standard environment of the Contractor. The purpose of this is to ensure that they have an understanding of the new system.
- The Contractor is responsible for training key-users and functional administrators of the Client.
- The key-users and functional administrators of the Client provide training for the other users.
- The Contractor will provide all standard training materials and work instructions available at the time of commencement of the implementation. The training material will be made available by the Contractor to the Client in a regular editable format in standard Office applications. If the Contractor has video instructions, these will also be made available to the Client.
- The Client will create or adapt training material based on the specific set-up of processes and systems for Fontys.

3.1.10. Organisational set up

The I&T department of the Client takes care of the integration between the new research information system and the other systems. This makes use of open standards and various modern techniques. Client has the role of system integrator and is thus responsible for integrating the research information system into its application landscape.

Users receive windows computers by default but can also use their own computer (e.g. MacOS) and can choose their preferred browser. The most commonly used browsers are Chrome, FireFox, Safari and Internet Explorer.

3.1.11. Management information

For management information, Fontys has the ambition to increase the use of our BI environment especially when data from different sources needs to be combined. Management information refers to steering reports (not operational reports). Currently most management information is used directly

from the applications we use. Management information within the scope of the application is required to support current processes.

When information about domains (different applications) needs to be combined, this is done within the Fontys BI environment. This is to avoid having to transport and integrate all kinds of data back and forth between different kinds of applications in order to use the reports there.

3.1.12. Service management

Contractor is responsible for an appropriate infrastructure. This includes accessibility and performance of the ICT Solution, a guaranteed backup and restore functionality and the presence of a contingency plan. The Contractor is also responsible for security of the ICT Solution and the servers.

The ICT solution will be managed by the Contractor as a SaaS system. We use the following principles for the management organisation after the ICT Solution goes live:

- The Contractor performs the technical management of the SaaS system.
- Functional management and application management (to the extent applicable) will be performed by internal employees of the Client.

In relation to support, the Contractor ensures an adequate support organisation as agreed upon in the contract.

3.1.13. Fontys corporate branding brandbook

The Fontys corporate identity brandbook contains guidelines and recommendations for consistently implementing the visual elements of our corporate identity. It includes directives on logo use, font, use of colour and use of visuals. These guidelines are unfortunately only available in Dutch, but images are declarative in nature (Fontys-Huisstijlgids-brandbook-Fontys.htm)

3.1.14. Users

For the purposes of the Contract, Fontys will distinguish the following types of users:

Type of user	Number	Explanatory notes	CRUD
Active researchers	603	(leading)lectors, researchers, PhD's, Professional Doctorates and Post-docs	CRUD
System administrators	2	System administrators responsible for functional management of the RIS	CRUD
Research support	57	Research support within the business units directly connected to the lectorates such as administrative support.	CRUD
Research Support team	23	Department within E&R providing policy advice, grant advice & support, research data management support, open access support etc.	R
(Research) managers and support	39	Management of business units and centres of expertise/knowledges centres	R

These numbers reflect the current reality as closely as possible. That being said, no rights may be derived from this. Periodic charges are set annually based on the number of active researchers (paragraph 9.2). No fees may be charged for the other types of users.

3.1.15. CPV coding

The following CPV codes apply to this tender:

- 48000000 - Software and information systems

3.1.16. Related services

In the Tender documents the scope of the tender is described. However, Fontys is also interested in opportunities for the (near) future and wants to have the possibility, within the preconditions of the Agreement, to make use of knowledge and expertise of the Contractor regarding modules related to the scope.

Fontys reserves the right to commission the Contractor for modules related to the scope, which have arisen due to evolving insights during the term of the Agreement. In such cases, the Parties will make further arrangements and document them in writing.

3.2. Merging and lots

This tender concerns an ICT solution that facilitates our research organisation in registering research information effectively through the same application and in the same manner across the organisation. The project will not be divided into lots as we are looking for one ICT solution for the entire organisation

3.3. Contract

The Contract will come into force on <<date of final award>>. The intended term of the Contract is a fixed period of five years, effective from the 'go-live' date of phase 1. After this initial term, the Client has the unilateral option to extend the Contract once for a period of two years, then once for a period of one year. Following these extensions, it will be possible to renew the Contract annually by mutual agreement.

The draft Contract associated with this tender is attached as Appendix 1. Amendments adopted by means of an Information Memorandum will be incorporated into the final Contract.

3.4. Processing agreement

This project requires a processing agreement. Appendix 1A is the draft processing agreement. The Client shall involve internal experts in reviewing the content of the appendices to the processing agreement. The final appendices to the processing agreement shall be determined by the Client and the Contractor in consultation.

After provisional award, the Contractor shall deliver the completed Appendix/Appendices to the processing agreement within ten working days.

3.5. Standby agreement

Contracting Authority will enter into a standby agreement with the second-place Bidder. If the Contract with the Contractor is terminated within two years from the effective date, the Client may proceed to award the contract to the party with whom Client reached a standby agreement via the tender, without retendering. Appendix 2 contains the draft standby agreement.

3.6. Contractmanagement

In appropriate contract management, the Client ensures that the promises made by the Tenderer in their Bid are fulfilled throughout the contract management phase. This involves attention to both operational administrative and management matters, as well as tactical and strategic contract and contractmanagement. Depending on the risk profile of the contract, the Client determines the breadth and depth of control and management during the contract management phase.

Contract management for the ICT solution Research Information is delegated to the Research and Development Department. Following the contract award, the Client collaborates with the Contractor to establish a structure for meetings and reporting to support contract management. This includes utilising an audit checklist, further elaborated in the document Non Functional Requirements and the Contract. The foundation for this process is the monitoring of all agreed obligations in the contract (both the specified requirements and the Contractors Bid), as well as the management of contract objectives in general. Client expects the Contractors maximum involvement in the execution of contractmanagement.

The Client conducts periodic evaluations of the Contractor's performance to assess adherence to agreed-upon standards. Contract management will be particularly intensive in the initial years, with at least one assessment conducted annually. Once service delivery is in line with contractual agreements and required performance levels are consistently achieved, the frequency of assessments will be reduced. However, if service delivery falls below the agreed performance standard during the contract period, the frequency of assessments will increase, accompanied by the implementation of an improvement plan.

4. Selection and award

4.1. Steps involved in selection and award

The selection and award takes place in five steps:

1. Review to verify proper form, structure and timeliness (knock-out criteria) (Chapter 5) and quality of the Bidder (knock-out criteria) (chapter 6).
2. Review in connection with Grounds for Exclusion and Suitability Requirements (knock-out criteria) (Chapter 7).
3. Review based on the Schedule of (minimum) Requirements (knock-out criteria) (Chapter 8).
4. Evaluation based on Award criteria (Chapter 9).
5. Intention to award and final award.

4.1.1. Form, structure and timeliness

Contracting Authority establishes requirements regarding the form, structure and timeliness of the Bid to be submitted, as well as with regard to the quality of the Bidder. If a Bidder does not unconditionally meet all requirements, their Bid will be excluded from further participation unless, in the opinion of Contracting Authority, the deviation is of no significance.

4.1.2. Grounds for Exclusion and Suitability Requirements

The Grounds for Exclusion relate to the legal situation of the Bidder. The Suitability Requirements concern the:

1. Financial and economic standing of the Bidder.
2. The professional and technical capability of the Bidder.
3. Professional qualifications (entry in trade or professional register).

If the Bidder does not meet the minimum requirements set, their Bid will be excluded from further participation, unless the Contracting Authority decides to admit the Bidder to the procedure on the grounds that the Bidder can, in the opinion of the Contracting Authority, sufficiently demonstrate their reliability and suitability.

4.1.3. Schedule of (minimum) Requirements

The remaining Tenders are evaluated based on the Schedule of Requirements that the performance to be delivered (service and/or supply) must meet at the time of delivery, or acceptance thereof, and must continue to meet during the term of the Contract.

If the Bidder does not meet the minimum requirements set, their Bid will be excluded from further participation unless, in the opinion of the Contracting Authority, there is an omission in the Bid that lends itself to rectification.

4.1.4. Award criteria

The remaining Bids will be evaluated and scored by the evaluation committee as per the provisions of Chapter 9.

4.1.5. Intention to award and final award

The rejected Bidders and the winning Bidder will simultaneously be notified of the award decision. The rejected Bidders will receive a letter stating the reasons for the rejection and the name of the winning Bidder.

4.2. Evaluation committee

The tendering team consists of subject matter experts from, among others, E&R, Fontys Marketing, Communication & PR, Fontys Information Provision and Technology, a Legal Affairs adviser and a Procurement adviser. The responses elaborated in connection with the qualitative sub-award criteria will be assessed by an evaluation committee consisting of subject matter experts from E&R, Fontys Marketing, Communication & PR and researchers and research support from several business units, among others.

5. Procedural aspects and regulations

5.1. General rules and regulations for the tender

5.1.1. Legislative framework

This tender will take place in accordance with the Public Procurement Act 2012 and the Procurement Policy of the Fontys Foundation.

5.1.2. No award

The Contracting Authority has the right not to award the contract and to withdraw this tender (prematurely). In that case, the Contracting Authority will inform you of this decision and the reasons for it. In the event a decision to withdraw is taken, any Tender Documents submitted will be disregarded and will lapse by operation of law. Any and all forms of compensation are excluded.

5.1.3. Financial compensation

No costs incurred by a Bidder in connection with participation in the Tender Procedure will be reimbursed.

5.1.4. Use of brand names or types

Wherever the Tender Document and/or its appendices mention brands, patents or types, or a specific origin or production, this should be taken to mean the given example or an equivalent.

5.1.5. Language

The Tender and any other correspondence and contact during the tender will be conducted in the English language. This will only be deviated from if the Bidder has legitimate reasons for providing certain statements or documents from specific bodies in another language.

5.1.6. Transfer of information provided

All (confidential) files and products obtained and kept by the Contractor in the context of this tender will at all times remain the property of Contracting Authority. At such time as the Contract ends, the Contractor is obliged to return these files and products to the Contracting Authority on first request, promptly and at no charge to Contracting Authority. If required, the Contractor shall destroy the files and products at the Contracting Authority's first request.

5.2. Regulations for submitting questions

5.2.1. Inconsistencies and irregularities

This Tender Document has been prepared with care. Should a Bidder nevertheless encounter inconsistencies or irregularities, Bidder shall make these known as soon as possible, but in any case before the closing date for submission of questions. After this deadline, Bidders cannot object to any inconsistencies and/or irregularities. How the inconsistencies and/or irregularities are dealt with will be assessed on a case-by-case basis.

5.2.2. Questions and suggestions

Questions and suggestions regarding the Tender Document and its appendices can only be submitted via the TenderNed question and answer module. Questions and suggestions submitted via other means will not receive a response.

Questions and suggestions should be submitted before the date and time specified in the schedule.

Questions may be submitted confidentially. In that case, the question and answer will be made known to the questioner only. When a Bidder (the questioner) seeks a confidential answer to a question, clear reasons must be given as to why the questioner believes that disclosure of this information would harm the legitimate economic interests of their company. If the Contracting Authority feels that the

relevant question does not meet this condition, the questioner will be given the opportunity to withdraw the question. In such cases, the Contracting Authority will not provide information in response to the withdrawn question, unless the question related to an error in the Tender Documents about which Contracting Authority must inform the other Bidders. If the questioner does not withdraw the relevant question, it will be processed and published anonymously on TenderNed, along with the corresponding answer.

Information is only binding to the extent that it is set out in an Information Memorandum.

5.2.3. Complaints

Contracting Authority has set up a hotline where complaints regarding a tender can be reported. Contracting Authority has assigned responsibility for this hotline to the Legal Affairs Team, email kmpa@fontys.nl. When submitting a complaint, you should clearly state which tender the complaint relates to and who the contact person from the Contracting Authority is for this tender.

Complaints about matters that were not first submitted as questions in the context of the Information Memorandum, but could have been asked at the time the Information Memorandum was published, will not be dealt with by the hotline.

5.3. Rules and regulations for submitting a Tender

5.3.1. General regulations

1. The Contracting Authority will use TenderNed for the purpose of receiving Bids. Bids submitted through any other route will not be accepted.
2. The announcement on TenderNed/TED and the Tender Document, together with the Information Memo(s), constitute the sole basis for the entire Tender Procedure. By participating in the tender, the Bidder explicitly agrees to the applicability and content of the announcement, the Tender Document and associated appendices, the Information Memo(s) and the requirements, Award Criteria and evaluation methodology laid down in the aforementioned documents.
3. The Bid must be uploaded by the date and time specified in the schedule. Bidders are responsible for the proper and timely uploading of their Bids. Due to potential technical issues, Bidders are advised not to wait until the very last moment to upload their Bids. Any and all Bids received by Contracting Authority after the stated deadline will be invalid and excluded from the procedure.
4. The Bid must contain only the documents required for the Bid. Attachments referenced multiple times (e.g. the European Single Procurement Document) need only be uploaded once.
5. The Bid must be signed by a legal representative of the Bidder.
6. The requirements, criteria and information provided in this tender are based on the best possible estimation of the assignment by Contracting Authority. Bidders cannot derive any rights from this information (numbers, specifications, schedule).
7. A Bid that does not meet the stated requirements/conditions will be set aside and excluded from further participation, unless Contracting Authority feels that the omission lends itself to rectification.
8. Any Bid with one or more conditions or reservations attached shall also be invalid.
9. A Bid is invalid if it is not filled in truthfully.
10. Bidders should be aware that failure to honour commitments will have consequences in terms of termination of the Contract. In such cases, the Bidder in question will be liable for damages. All costs incurred to reach a new tender or Contract will be recovered from the Bidder, without prejudice to other rights.
11. Rigged Bids, which intend to manipulate the evaluation system in such a way as to distort the purpose intended by that system, e.g. offering realistic prices, will be declared invalid.
12. If the Contracting Authority finds that a Bid is abnormally low, the Bidder may be rejected on that ground (Art. 2.116 / Public Procurement Act 2012).
13. Your Bid must include a 'final offer'. No negotiation, either on content or price, will take place following submission of Bids. Consequently, each Bidder should submit a Bid that reflects the best possible terms.

5.3.2. Tax obligations, environmental protection and working conditions

When preparing their Bid, Bidders must take into account the obligations under the provisions on employment protection and working conditions applicable in the country where the assignment is to be performed, as referred to in Article 2.81(2) of the Public Procurement Act 2012.

As far as performance in the Netherlands is concerned, Bidders may obtain knowledge regarding taxes and environmental protection, working conditions and labour protection from:

- the Tax & Customs Administration, www.belastingdienst.nl
- Ministry of Infrastructure and Water Management, www.government.nl/ministries/ministry-of-infrastructure-and-water-management
- Ministry of Social Affairs and Employment, <https://www.government.nl/ministries/ministry-of-social-affairs-and-employment>

5.3.3. Validity of Bids

The Bidder must remain prepared to fulfil their Bid(s) (i.e. commit to the validity) for a period of three months from the deadline for submission of the Bid. The Contracting Authority may request an extension of this bid validity period. No claims for award may be derived from such a request.

If summary proceedings are commenced, the Contract will not enter into force until judgment is given in summary proceedings in relation to the award. In view of this, this Tender Procedure requires all Bidders to maintain their Bids until the aforementioned deadline has expired or (if summary proceedings are initiated) until 14 days after the date on which judgment is rendered.

5.3.4. Number of Bids

The present tender has not been divided into lots. It is not possible to bid on part of the tender assignment.

Each Bidder, whether part of a Combination or not, may submit a maximum of one Bid per tender. Bidders may not submit a Bid independently or in a Combination when that Bidder is also acting as a Subcontractor in one or more Bids that would place demands on the Bidder's capacity and/or capability.

- If a Bidder submits more than one Bid, whether independently or as part of a Combination, all of these Bids will be set aside.
- If a Bidder submits a Bid once independently or once as a Combination and is also deployed as a Subcontractor in one or more Bids, the performance of which would place demands on the Bidder's capacity and/or capability, their independent Bid or their Bid as part of a Combination will be set aside.

The term 'Bidder' is understood to mean not only the tendering legal entity, but also all (legal) persons with whom that entity has a legal, economic and/or fiscal relationship or forms a unit.

Multiple companies within a Concern may register as Bidders (independently, in Combination, or as Subcontractor) only if they can demonstrate — at the Contracting Authority's request — that they have each prepared a Bid independently from the other Bidders (including the Bidders that are part of the same Concern), and have observed confidentiality in doing so. If this cannot be demonstrated by any of the relevant Bidders, this will result in the Exclusion of all Bidders belonging to the Concern in question.

A market party may be engaged as a Subcontractor by more than one Bidder.

5.4. **Opening of the bidding period**

As soon as possible after the closing of the bidding period, the digital 'safe' containing the Bids will be opened. An opening report indicating which Bidders have submitted a Bid will be sent out via TenderNed.

5.5. Clarification and verification of the Bid

Bidders are responsible for ensuring their Bids are submitted correctly, completely and clearly. Contracting Authority will base its review and evaluation of the Bid on the information as provided by the Bidder.

Contracting Authority reserves the right to ask for clarification. It is emphasised that no second attempts at submission will be permitted. A clarification presupposes that the Bid remains unchanged in terms of content and that Bidder will provide further elaboration only on the requested elements of the Bid, so that Contracting Authority may gain a clearer picture of what has been offered. Bidder must provide this clarification within two Working Days (here: Mon through Fri), after the request from Contracting Authority. If Contracting Authority has not received the requested documents within the stipulated period, Contracting Authority reserves the right not to award the contract to this Bidder.

In addition, Contracting Authority reserves the right to verify the accuracy of all requested information. Bidder must submit the supporting documents within five Working Days (here: Mon through Fri) following the request of Contracting Authority.

It is expressly stated that providing incorrect information will result in definitive Exclusion of the Bid. Failure to provide the requested information, or to provide it in full, will likewise result in Exclusion.

5.6. Award decision and legal protection

The rejected Bidders and the winning Bidder will simultaneously be notified of the award decision. The rejected Bidders will receive a letter stating the reasons for the rejection and the name of the winning Bidder.

If a Bidder objects to the decision, they must notify the Contracting Authority within twenty (20) calendar days from the date of dispatch of the award decision notification, and must enclose, along with that notification, a copy of a signed summons stating the date on which the court will hear the case. If Contracting Authority has not received a copy of a summons within the aforementioned period, the contract will be definitively awarded. The above deadline is an expiry period.

The communication of the award decision to the winning Bidder(s) does not constitute acceptance of the offer submitted by the winning Bidder(s). The Contract is established at the time of the Contractor's receipt of the Client's written confirmation of the assignment.

6. Quality of the Bidder

A Bidder can submit a Bid independently or in a Combination formation. In addition, it is permitted to submit a Bid involving Subcontractors and the technical capability and/or financial and economic standing and/or professional qualifications of these Subcontractors may be called upon.

6.1. Bidding as a Combination

If Bidder is unable or unwilling to provide the requested services independently, they have the option of submitting a Bid in collaboration with other organisations. The resulting Combination will be evaluated as a single entity. The Combination is obliged, upon submitting a Bid, to appoint one Coordinator to represent them and/or act as Coordinator in all respects. No changes may be made to the Combination after the closing date of the bidding period.

Upon Award, a jointly signed declaration will be provided by the Combination of suppliers, stating that all members of the Combination are jointly and severally liable for the performance of the financial and technical aspects of the assignment.

A collaborative formation (Combination) is when several companies submit a joint bid for an assignment. Part II of the European Single Procurement Form (Appendix A) lists the companies that make up the Combination. The Bidder shall specify the Suitability Requirements that their company is called upon to meet. Each member of the Combination shall submit a European Single Procurement Document.

Additionally:

- Each member of the Combination must sign and submit the European Single Procurement Document (attached as Appendix A to this document) along with the Bid.
- Upon request from the Contracting Authority after the intention to award, each member of a Combination must submit an extract (or copy of an extract) from the professional or trade register in the country of their registered offices, showing who is authorised to represent the company. Power of representation means that the person or persons signing the European Single Procurement Document must be listed in the trade register as persons authorised to represent the company. Where the trade register states that two or more persons have power of representation only when acting jointly, the European Single Procurement Document must also be signed by those two or more persons. Where the power of representation is subject to restrictions, these restrictions should be taken into account.
- Upon intention to award, each member of a Combination shall submit the supporting documents as listed in Chapter 7.

6.2. Demands placed on the capacity and/or capability of Third Parties

An independent Bidder or a Combination may rely on the capacity and/or capability of other natural persons or legal entities for performance of the contract, irrespective of the legal nature of its links with these natural persons or legal entities.

When relying on (a) Third Party/third parties as referred to above, Bidder or Combination assumes the obligation to actually have the Third Party/third parties available for those parts for which the reliance on the Third Party/third parties is made (self-requirement) during the performance of the assignment. With regard to deployment of professional and technical capability, this concerns, if applicable, the required availability of personnel and technical equipment.

For an appeal to financial and economic standing, this obligation implies that the Third Party/Parties concerned are jointly and severally liable for the fulfilment of the obligations arising from the Bid as well as the performance of the Contract.

Contracting Authority is entitled to require Bidder or Combination to demonstrate the actual availability of the relevant Third Party/Parties for the performance of the assignment, by delivering legally valid statement(s) signed by the relevant Third Party/Parties.

The Bidder or Combination, if planning to rely on Third Party/Parties, shall indicate in Part IIC of the European Single Procurement Document (Appendix A) for which Suitability Requirements they will rely on a Third Party/Parties.

Also required:

- Third Party/Parties must sign and submit the European Single Procurement Document (attached as Appendix A) along with their Bid.
- Upon request from the Contracting Authority after the intention to award, third party/parties shall submit an extract (or a copy of an extract) from the professional or trade register in the country of their registered offices, indicating who is authorised to sign the Bid on behalf of the company. If the Bid has been signed by a person other than mentioned in the register, the relevant proxy agreement (or copy thereof) must be submitted along with the Bid.
- Upon intention to award, the Third Party/Parties shall submit the supporting documents as listed in Chapter 7.

6.3. Subcontracting

For both independent Bidders and a Combination, although they independently meet the Suitability Requirements set out in this tender, it is possible that they may engage Subcontractor(s) in the performance of the assignment. In case of subcontracting, Bidder or Combination must indicate which Subcontractor they intends to use and for which parts/aspects of the assignment they intend to do so. The Bidder or Combination also guarantees that the Third Party in question meets all the requirements set out in this tender with regard to the activities to be assigned to that Third Party.

Subcontractor shall also mean an employment agency used by the Contractor for hiring temporary employees. If the Contractor issues assignments to Third Parties/Subcontractors in the context of the performance of this Contract, the Contractor shall continue to act as the contracting party and the Contractor shall be jointly and severally liable for the performance of the obligations as well as for the obligations subcontracted.

The Contractor always indemnifies the Client against any adverse consequences of such outsourcing. If the Contractor is considering using a Subcontractor or employees hired via a temporary employment agency, the Contractor shall specify the name and business address of the relevant company in the Bid.

In case of head/subcontracting, the head contractor is the sole contractual counterparty of the Contracting Authority and remains jointly and severally liable for the performance of the obligations as well as for the subcontracted obligations. Only the head contractor will submit the requested information.

Bidder will indicate which part of the assignment will be subcontracted and with whom the subcontract will be placed. To this end, Bidder must complete Part IID of the European Single Procurement Document (Appendix A). If the name(s) of the Subcontractor(s) is/are not yet known, the work to be subcontracted will be listed. The Bidder must still provide the name and business address of the relevant Subcontractor after intention to award.

7. Grounds for Exclusion and Suitability Requirements

Only those Bidders who, in the opinion of the Contracting Authority, have demonstrated in good time that they meet the minimum requirements set out in this chapter with regard to the absence of Grounds for Exclusion and that they are in compliance with the stipulated Suitability Requirements will be eligible for the award of the Contract.

7.1. Grounds for Exclusion

Grounds for Exclusion are intended to ensure that only companies with integrity and a sound financial position are traded with. The Public Procurement Act 2012 recognises two types of Grounds for Exclusion: mandatory and optional.

7.1.1. European Single Procurement Document

The attached European Single Procurement Document (ESPD, section III) lists the Grounds for Exclusion applicable to this Tender Procedure. In order for you to be considered for award of the Contract, no Grounds for Exclusion may apply to you. If they do apply, you may be Excluded from further participation. By completing and submitting the ESPD along with your Bid, you indicate that no Grounds for Exclusion are initially applicable in your case. Only the winning Bidder(s) may be asked to submit the supporting documents. The supporting documents must be submitted within five working days following the Contracting Authority's request.

Information to be provided in connection with Grounds for Exclusion

You may use the following supporting documents to prove that no Grounds for Exclusion apply to you:

- A Declaration of Conduct in public procurement, as referred to in Article 4.1 of the Public Procurement Act 2012, which is not older than two years from the closing date of the bidding period.
- A copy of the extract from the professional or trade register, not older than six months from the closing date of the bidding period.
- A declaration from the Tax & Customs Administration (statement of payment behaviour in compliance with tax obligations) that is not older than six months from the closing date of the bidding period.

NB: Applying for a Declaration of Conduct in public procurement and a declaration from the Tax & Customs Administration is a lengthy procedure. We therefore advise you to submit this request, if necessary, during the tender period. That way, when the Contracting Authority requests these documents, you will be able to submit the documents before the deadline.

NB: If you submit a Bid as a group of cooperating businesses (Combination), each member of the Combination must be able to provide these supporting documents. When a Subcontractor is called upon to meet Suitability Requirements, the relevant Subcontractor must also be able to provide this evidence.

7.2. Suitability Requirements

Suitability Requirements are requirements concerning your financial and economic standing, professional and technical capability and/or professional qualifications. You must meet the stipulated Suitability Requirements in order to be considered for award of the Contract. You initially declare this by completing and submitting the European Single Tender Document (ESTD, Part IV), unless otherwise indicated later in this chapter. Only the winning Bidder(s) may be asked to submit the supporting documents. The supporting documents must be submitted within five working days following the Contracting Authority's request.

If Bidder relies on the financial and economic standing and/or technical capability and/or professional qualifications of other entities (i.e. entities that are not part of Bidder), then after the award decision is taken, it will demonstrate that it can have the necessary resources at its disposal for the execution of the contract. The European Single Procurement Document (ESPD, Part IIC) should indicate which other entities are being called upon.

7.2.1. Requirements with regard to financial and economic standing

Insurance

Bidder must be insured against liability with a minimum coverage of €500,000 per damaging event with a maximum of €1,000,000 on an annual basis, or be willing to take out such insurance upon award.

Information to be provided:

By submitting their Bid, Bidder confirms under Section IV of the European Single Procurement Document (Appendix A) that they fulfil the stated requirement(s). The European Single Procurement Document (ESPD) must be included.

At the request of the Contracting Authority, the winning Bidder shall submit, as evidence thereof, a copy of a certificate of insurance showing the amount for which the Bidder is insured. If proof of a group policy is submitted, it must be clear that Bidder is among the insured parties.

7.2.2. Requirements concerning professional and technical capability

References

With references, the Bidder demonstrates the necessary core competence(s) for the performance of the tendered contract. This means that the Bidder demonstrates experience in key aspects of the tendered assignment.

For each core competence, you should provide a reference demonstrating your ability to independently meet the standard. If you provide a reference concerning a reference assignment performed in Combination or with a Subcontractor, the same Combination or Subcontractor must be available for performance of this Contract.

Along with the Bid, Bidder or Combination shall submit one reference per core competence covering the past three years from the closing date of the bidding period. The following core competence(s) is/are applicable:

- Core competence 1: Bidder has knowledge and experience in implementing and configuring a research information system (RIS) as a SAAS service, including providing training and education with regard to that system. The assignment was carried out at an organisation with at least 1,000 employees;

The reference assignment was completed within the past three years from the closing date of the bidding period.

- Core competence 2: Bidder has knowledge and experience with regard to the provision and comprehensive management (i.e. maintenance, upgrades, support, etc.) of a research information system (RIS) as a SaaS service. The assignment was carried out at an organisation with at least 1,000 employees.

The reference assignment must also have required at least one year to complete (length of production process). The end date of service is not more than three years from the closing date of the bidding period.

One reference may demonstrate multiple core competences. For each core competence, the reference statement must be completed in full. The reference shall include the name of the contact person at the reference, as well as an email address and telephone number where they can be reached, and an explanation of why Bidder believes this reference fits the requested core competence, all in accordance with Appendix B.

Information to be provided:

Bidder shall submit completed and signed reference statement(s) along with their Bid. To be added as Appendix B.

The assignment referred to in the reference must have been performed to the demonstrable satisfaction of the referent. Upon submission of the Bid, or no later than five Working Days (here: Mon to Fri) after the Contracting Authority's request to that effect, the Bidder shall submit a statement of satisfaction from the Reference provided (in the format of their choice). This should explicitly show that

the referent is satisfied with the service in question. Failure to provide a signed declaration of satisfaction invalidates the reference.

Contracting Authority reserves the right to contact the Client(s) involved in the reference assignment(s) submitted by Bidder without the intervention of Bidder, or to require inspection of contract documents relating to the reference assignment(s).

ISO 27001 or equivalent

ISO 27001 is an information security standard used by the Client. ISO 27001 specifies the requirements for implementing security measures in the context of the organisation's overall business risks. The aim is to ensure availability, integrity and confidentiality. The Client declares this standard applicable.

Information to be provided:

By submitting their Bid, Bidder confirms under Section IV of the European Single Procurement Document (Appendix A) that they fulfil the stated requirement. The European Single Procurement Document (ESPD) must be included.

At the Contracting Authority's request, the winning Bidder shall submit a copy of a valid ISO 27001 certificate or equivalent. Bidder is responsible for demonstrating the equivalence of any other certificate. Evidence of ongoing preparation for certification — with the caveat that the certificate will be obtained no later than effective date of Contract — is also sufficient.

7.2.3. Requirements concerning professional qualifications

Entry in professional or trade register

Bidder must be registered in the professional or trade register in force in their country of origin.

Information to be provided:

By submitting their Bid, Bidder confirms under Section IV of the European Single Procurement Document (Appendix A) that they fulfil the stated requirement(s). The European Single Procurement Document (ESPD) must be included.

At the Contracting Authority's request, the winning Bidder shall submit, as evidence thereof, an extract (or copy of an extract) from the professional or trade register of the country in which they have their registered offices.

If the Bid has been signed by a person other than mentioned in the register, the relevant proxy agreement (or copy thereof) must also be submitted.

8. Schedule of Requirements

All requirements set out in this chapter must be met during execution of the contract, unless otherwise specified. By participating in the tender, Bidder confirms that they unconditionally meet the stated requirements.

8.1. Functional requirements

1	Audits	The ICT solution includes functionality to feature logging and audit functionalities to track user activities. This must be fully available to the System Administrator(s).
2	Customization	The ICT solution includes functionality to provide a way to guarantee the quality of metadata with help of customisable moderation workflows that enable predefined approval processes including the option to lock/unlock fields and records.
3	Data Management	The ICT solution includes a search function that also searches in custom fields, including filter functionalities. The search results must be able to exclude hidden or restricted fields.
4	Data Management	The ICT solution includes functionality to support historical data.
5	Data Management	The ICT solution includes functionality to support both hierarchical organisation units (e.g. business units and departments) and non-hierarchical units (e.g. research groups) (see example in appendix Fontys Research Information Specifications)
6	Data Management	The ICT solution includes functionality for manual and bulk registering, updating and archiving of data such as personal profiles, organisation units, research projects, research output, facilities and datasets.
7	Data Management	The ICT solution provides functionality to upload digital research output including related metadata to the institutional repository. The process supports the option to harvest metadata from the institutional repository.
8	Data Management	The ICT solution includes functionality that provides data for input fields from reference tables (e.g. drop-down menu, selection boxes) as output types. The reference tables content can be managed by the System Administrator(s).
9	Data Management	The ICT solution includes functionality that allows the System Administrator(s) to determine mandatory input fields in records. The ICT solution checks mandatory fields when a new record is created or updated.
10	Document Administration	The ICT solution includes functionality to enter metadata for a broad range of research output types (such as artistic works, software, tools).
11	Integration with External Systems	The ICT solution provides a reference import function/integration that is easy to use and which provides the ability to import references in bulk, including metadata and affiliation information per author from at least one external source that is not subject to additional subscription.
12	Integration with External Systems	The ICT solution provides integration with related systems. These systems and integrations are delivered as described in the section about research information integrations (par. 3.1.7). Providing integrations that support (a) the import of source data from data sources and (b) the provisioning of all research information including interconnections (export).
13	Integration with External Systems	The ICT solution includes functionality to provide the option to register persistent identifiers such as ORCID and DOI.
14	Moderation	The ICT solution includes functionality to support moderation (workflows) to validate records (at least research output) as a condition before they can be displayed externally.
15	Moderation	The ICT solution includes functionality to indicate which users are authorised researchers: a) as a condition for external publication of the personal profile. b) the amount of active researchers as a basis for the calculation of the recurring charge.
16	Reminders and Notifications	The ICT solution includes functionality to include the option of sending e-mail notifications for workflows and as a contact option from a moderation standpoint.
17	Reporting and Export	The ICT solution includes functionality to make and show reports including the possibility for reporting on different aggregation levels.
18	Reporting and Export	The ICT solution includes functionality to offer an export feature for reports in common file extensions (such as PDF, CSV, XLSX).
19	Research entities	The ICT solution includes functionality to support the entity person and related must have attributes (see appendix 3 Fontys Research Information Specifications).

20	Research entities	The ICT solution includes functionality to support the entity organisation unit and related must have attributes (see appendix 3 Fontys Research Information Specifications).
21	Research entities	The ICT solution includes functionality to support the entity research project and related must have attributes (see appendix 3 Fontys Research Information Specifications).
22	Research entities	The ICT solution includes functionality to support the entity research output and related must have attributes (see appendix 3 Fontys Research Information Specifications).
23	Research entities	The ICT solution includes functionality to support the entity research activity and related must have attributes (see appendix 3 Fontys Research Information Specifications).
24	Research entities	The ICT solution includes functionality to support the entity prize and related must have attributes (see appendix 3 Fontys Research Information Specifications).
25	Research entities	The ICT solution includes functionality to support the entity facility and related must have attributes (see appendix 3 Fontys Research Information Specifications).
26	Research entities	The ICT solution includes functionality to support the entity dataset and related must have attributes (see appendix 3 Fontys Research Information Specifications).
27	Showcasing	The ICT solution includes functionality to provide an external research portal with a search functionality, meeting Fontys corporate identity demands (customisable colour and logo, see Fontys corporate identity guidelines par. 3.1.13).
28	Showcasing	The external research portal part of the ICT solution showcases publicly available metadata regarding the entities person, organisation unit, project, research output, research activity, prize, facility and dataset.
29	Showcasing	The external research portal includes analytics data, to evaluate the usage of the portal content, such as hits, number of unique visitors, keywords searched for, active users, user activity, redirect.
30	User Profile Administration	The ICT solution includes functionality to enable users to edit and manage their user profile. Also the possibility to show/hide personal profile information.
31	User Profile Administration	The ICT solution includes functionality that allows a user to assign a delegated user to its personal profile. This delegated user is enabled to edit and manage the delegated profile.

8.2. Non functional requirements

32	ICT Solution	The contractor provides a ICT solution that is Commercial Off-The-Shelf (COTS) software. The software is a pre-developed, readily available platform designed for a broad user base, meeting Fontys' requirements. Modifications to the software will become part of the standard (COTS) solution no later than 6 months after GO live of phase 1.
33	ICT Solution	Parts of the solution can be disabled, if the solution offers more than the required functionality, to prevent overlap with other applications used by Fontys. Disabling functionality should not negatively impact the solution.
34	ICT Solution	All upgrades are included with a fallback scenario. In case a version upgrade fails, a rollback is available.
35	Environments	The contractor will provide four separate environments for the full term of the agreement: - Production environment; - Environment for internal training purposes including client-specific training content; - Test environment for conducting tests. Only on request for testing changes to interfaces (with the intent to cover the duration needed to apply changes to the interfaces); - Acceptance test environment for running tests with a representative set of the production data. Only when changes may affect interfaces.
36	Accessibility	The solution complies with the regular accessibility requirements (WCAG 2.1), levels A and AA. This requirement applies to websites, apps, intranets, and extranets that go live or undergo significant modifications. See: https://www.w3.org/TR/WCAG21/
37	Accessibility	The user interface, including all help functions, is available in English and/or Dutch.
38	Accessibility	The content of the research portal is easily crawlable for search engines and attains search ranking that fits the content. This means that only publicly available metadata is crawlable.

39	Accessibility	The solution supports at least the following browsers, without the need to make use of a plugin: Safari, Microsoft Edge and Google Chrome.
40	Accessibility	Error messages by the system are self explanatory and supplied with context information.
41	Data Handling	All data is encrypted when stored and transported (rest and flight). Encryption uses TLS 1.2 or higher.
42	Data Handling	For email, NCSC standards (National Cyber Security Center) are applied following the guidelines of the Secure Email Coalition. These standards include DMARC+DKIM+SPF to combat phishing and STARTTLS+DNSSEC+DANE to prevent eavesdropping.
43	Data Handling	The contractor's retention regime with regard to personal data will comply at all times with the retention periods stated by the client.
44	Data Handling	The solution is webbased and supports system integration via a modern RESTful-API (REST/Json) (POST and GET). Authentication is done via OAuth 2.0 and full API documentation is available (swagger). The contractor's API provides clear data-communication responses. Each entity is identified by a unique key.
45	Data Handling	Both parties (contractor and client) maintain versioning on the interface(s).
46	Data Handling	The solution supports realtime or near realtime data exchange.
47	Data Handling	In principle all changes to interfaces are backward compatible. In the exceptional case of a breaking change, the old interface will remain supported for at least 120 days, and the contractor will actively inform the client about the breaking change, in order to give the client time to assess the impact of the breaking change on existing integrations, and to make any necessary changes to the integrations.
48	Data Handling	It is easy to exchange content with comparable systems via import and export using industry standard exchange formats, at least .ris files or latest version of CERIF XML Data Exchange Format Specification. Exporting all data should be possible with minimal effort, preferably by clicking a single download backup button.
49	Data Handling	Full integration of the institutional repository is supported. Upload to the repository via the upload API (https://api.surfsharekit.nl/api/repoitemupload/v1/docs#/Repository%20item/post_create) and data harvesting is supported via OAI-PMH (https://api.surfsharekit.nl/api/oaipmh/v1/docs)
50	Identity and Access Management	The use of the application is logged, whereby the client can produce reports, or the contractor can produce reports at the client's request, from the application indicating who has logged in at what time and which actions have been carried out (so-called audit trail).
51	Identity and Access Management	Data in the solution is made available on the basis of Role-Based Access and least-privileged. If data is stored by the contractor that may not be available for certain roles within the organisation, it is possible to make this data inaccessible for these specific roles.
52	Identity and Access Management	The contractor supports federative authentication via Surf Conext including SCIM messages.
53	Security and Privacy	As the client wants to use secure domain names, the contractor's infrastructure environment must be operationally equipped with "Domain Name System Security Extensions" (DNSSEC) or comparable.
54	Security and Privacy	The client is looking for a contractor that can offer a solution where the contractor is a true partner in the field of privacy and security. This means that the contractor commits to "privacy-by-design & default" and "security-by-design & default", and to making any effort necessary to ensure that both the solution and the environment on which the solution runs have maximum security (fitting technical and organisational measures). To summarise: only allow access to client's information based on "least privilege" and agreed methods).
55	Security and Privacy	The contractor must cooperate with any request in the context of the rights of data subjects (GDPR), including "right to be forgotten" and "right of access".
56	Security and Privacy	No personal data is written into log files, except for suitably encrypted log files where access is regulated.
57	Security and Privacy	Log files can be pseudonymised or anonymised so that no personal data is shared during troubleshooting.
58	Security and Privacy	The contractor reports security incidents to the client. Security incidents are reported immediately by telephone and by e-mail to Fontys Network Security Operations Center (NSOC).
59	Security and Privacy	The contractor develops and manages the solution on the basis of "secure software development guidelines". The client applies similar guidelines to the

		Security Technical IT Checklist (STITCH) (https://www.surf.nl/files/2022-03/stitch-1.1-2022_0.pdf).
60	Security and Privacy	Periodic Risk Analysis: The contractor performs a risk analysis at least once a year according to a predetermined yearly schedule. The scope of this analysis pertains to the services provided and involves identifying and classifying risks, and determining measures to either mitigate these risks or consciously accept them. The contractor commits to providing evidence for these mitigating measures. Additionally, the client commits to participating in the annual supplier evaluation, during which these topics are discussed.
61	Security and Privacy	Periodic Independent Audit and Penetration Test: The contractor organises at least one audit and one penetration test per year at their own expense, conducted by independent third parties. The purpose of these assessments is to evaluate the security of data within the application. - The penetration test primarily focuses on the security of the software, assessing vulnerabilities that could allow unauthorised access to the data. It is carried out by a specialised company in coordination with and with the consent of the client. - The independent audit examines process adherence and ensures adequate security, including that of the data centre environment. The client receives written reports from both the penetration test and the audit. Recommendations resulting from these assessments, to the extent that they impact the client's activities, are discussed and implemented in consultation with the client.
62	Security and Privacy	The solution, the way data is stored, and the way data is processed can be proven to meet GDPR legislation. The contractor is the data processor in the context of GDPR.
63	Security and Privacy	The services comply with the Legal Standards Framework / the higher education frameworks (https://www.surf.nl/en/surf-framework-of-legal-standards-for-cloud-services). This document describes the various confidentiality, privacy, ownership and availability standards that suppliers (including cloud suppliers) must meet.
64	Security and Privacy	If the entry includes third party components, such parties are considered sub processors. The processor ensures that requirements from the processing agreement also apply to the processor and sub processor
65	Security and Privacy	The client reserves the right, at the client's expense, to have an additional a pen test performed, for the purpose of testing data security in the application. The pen test is done by a party chosen by the client. The pen test is done on an environment indicated by the contractor, for which indemnity has been agreed.
66	Service	The contractor will proactively inform the client in the event of serious malfunctions or calamities and will immediately take measures to prevent a data breach or data loss. The contractor will notify the client as soon as possible after a malfunction or calamity has been identified.
67	Contract	The client can influence the roadmap of the contractor including the prioritization of change requests.
68	Contract	The contractor makes its release calendar available to the client. The release calendar plans at least 6 months ahead.
69	Contract	The contractor appoints a dedicated account manager as a direct contact for escalation of issues (both project- and maintenance-related). The account manager initiates recurring meetings and takes responsibility for the meeting minutes.
70	Contract	The contractor ensures and the client monitors that the contract and the service level agreement are complied with during the entire term and any extensions of the contract and that the processing agreement is up to date.
71	Contract Management	The contractor will provide quarterly SLA reports according to an SLA reporting format agreed by the contractor and client. If the service falls below the agreed level, the contractor will take measures to bring the service up to the agreed service level. These measures are detailed in an improvement plan that is shared in writing with the client and discussed upon request.
72	Contract Management	The contractor provides the information agreed upon by the client and contractor for the purpose of performing contract management within 2 weeks of the client's request.
73	Contract Management	The contractor agrees to regular meetings with the client with at least the following frequency, both during and after implementation. - tactical (semi-annually) - strategic (annually)

9. Award Criteria

9.1. Award methodology

Bids will be judged on best price-quality ratio (BPQR). A maximum of 100 points can be obtained. For each Award criterion, the number of maximum points to be awarded is indicated. The Bidder with the best price-quality ratio (BPQR) will be eligible for award of the contract.

Award criterion	Max. number of points
Price	20
Quality	80
Total	100 points

9.2. Price

To allow for evaluation of this criterion, Bidder should attach the fully completed price sheet as Appendix C to their Bid¹. All prices to be quoted must be all-inclusive prices, stated in euros, excluding VAT. Failure to complete the price sheet in full may result in exclusion from further participation in the tender.

One-off costs

Bidder shall quote a price per phase that includes all one-off costs to be incurred, including, but not limited to, setting up the technical (cloud) environment, implementation, set-up and configuration, project organisation, administration, establishing links, testing, training, education, workshops, etc.

These one-off costs should include all costs for performance of the Contract and no other or additional costs may be charged.

Periodic costs

Bidder should also specify periodic costs, in the form of a fixed price per year per active researcher for the ICT solution (excluding the research portal) and a fixed price per year per active researcher for the research portal itself.

Active researchers include active Fontys employees designated as researchers by the Client.

The fixed prices per year per active researcher should include all periodic costs, including, but not limited to, hosting, licences, all types of maintenance, service desk, SLA (management), documentation, management reports, accountability, etc. The periodic costs should include all costs for performance of the Contract and no other or additional costs may be charged.

For tender purposes, the fixed prices per year per active researcher will be multiplied by the number of users specified in the Price Sheet. This total periodic cost per year will be included in the (fictive) TCO calculation.

The number of researchers given reflects the current reality as closely as possible. That being said, no rights may be derived from this. Periodic charges are reset annually based on the actual number of active researchers² for the following calendar year as of the reference date (31 December). A minimum of 400 active researchers applies at all times. For the first year, 603 active researchers are assumed. During the calendar year, there is no settlement of deviations from the number of active researchers as determined on the reference date. Suppose the number of active researchers in the first calendar year increases from 603 active researchers to 650 active researchers, the periodical costs for the first calendar year remain based on 603 active researchers while 650 active researchers use the ICT solution in the first calendar year.

TCO calculation

The Award Criterion 'price' will be evaluated on the basis of the Total Cost of Ownership offered (as completed in the price sheet), where the total sum consists of:

¹ On TenderNed, the bid form includes a required field in which a price must be specified. The submitted price sheet and the price(s) stated thereon are leading at all times.

² Active Fontys employees designated as researchers by the Client.

Total sum = (Total One-off costs) + ([Total periodic costs per year] x 8 years).

The Bidder with the lowest total price scores the maximum number of possible points. The score of the remaining Bidders will be determined using the following formula. The resulting score is always rounded to two decimal places.

$$\frac{\text{Lowest total price}}{\text{Total price offered by Bidder}} \times \text{Maximum number of points possible}$$

9.3. Quality

9.3.1. Evaluation procedure

For all sub-award criteria, the following evaluation method and procedure apply unless otherwise specified for the relevant sub-award criterion.

Each member of the evaluation committee will issue their opinion independently of the other members. In case of significant differences in individual evaluations, the differences will be discussed in plenary and individual evaluations may be adjusted as a result of this discussion.

Scores are awarded for each sub-award criterion according to a 'grading system', with the number 10 being the best possible score and the number 0 being the lowest possible score. The following principles apply to the allocation of the scores:

Score	Meaning
0	Extremely poor. The answer is missing or entirely unsatisfactory.
2	Poor. The answer is poor and the manner of answering hardly answers the question or insufficiently takes into account the Contracting Authority's requirements.
4	Unsatisfactory. More than one component is missing from the answer, the manner of completion is inadequate or the answer insufficiently takes into account the Contracting Authority's requirements.
6	Satisfactory. Fewer significant points are missing, manner of completion is reasonable or sufficiently reflects the Contracting Authority's requirements.
8	Good. The answer clearly provides the insight that has been requested and effectively takes Contracting Authority's requirements into account; it may also contain creative and/or innovative elements
10	Excellent. Completely convincing.

In-between scores are not assigned.

The final score for each sub-award criterion is arrived at by determining the unweighted average of the scores given by the individual members of the evaluation committee, dividing by 10 and then multiplying by the weighting as set out in section 9.3.

The responses provided by the Bidder under the sub-award criteria shall be construed as commitments regarding how the Contract will be fulfilled. Thus provided responses will therefore become part of the Contract to be concluded.

9.3.2. Weighting of sub-award criteria

The qualitative sub-award criteria pertain to the following topics. For each topic, the maximum number of possible points is indicated.

Sub-award criterion (SAC)	Breakdown + max. no. of points	Max number of points per SAC
1 Use cases	1.1 Use case Workflow & moderation: 6	15
	1.2 Use case Reporting module: 6	
	1.3 Use case Handling historical data: 3	
2 User experience	2.1 UX Search, modify & add: 7,5	15
	2.2 UX Reporting: 5	
	2.3 UX Moderation: 2,5	
3 RIS functionalities	3.1 Nice to have attributes: 10	30
	3.2 Data model interface: 20	
4 Research portal		15
5 Training, instruction & Support		5
Total		80

In order to guarantee a minimum quality level, Bids receiving an average score lower than 5.00 out of 10.00 on sub-award criterion 1 (use cases total) and/or 2 (user experience total) and/or 3.2 (data model interface) and/or 4 will be excluded from further participation in the tender procedure

The resulting score for each sub-award criterion is always rounded to two decimal places.

Text sections that exceed the requested maximum will not be included in the assessment.

9.3.3. Sub-award criterion 1: Use cases

Qualitative assessment of the requested functionality is partly based on Use cases. A Use case consists of a functional description plus (where indicated) a live demonstration. The topics of the Use cases were carefully determined by Fontys, and are outlined in the table below.

The Bidder must answer all written questions / described topics. In the table below, the allowed number of pages per use case for submission is indicated. Additionally, the response for each use case may be supported by supplementary screenshots. The provided appendices must be relevant and limited in size. Two of the use cases are also designated to be shown during a demonstration (details indicated per Use case).

The response to all three use cases must be added as Appendix D to the Bid.

Aspects on which each use case is evaluated count as a whole towards the maximum number of points to be scored for that use case. The response will therefore be assessed in its entirety for each use case.

Basis for assessment:

- The extent to which the written questions / described topics are covered by the capabilities of the ICT solution.
- The extent to which the ICT solution covers the functional needs qualitatively better (meets the client's need better and/or provides added value).

Topic and max. no. of points	Format	Demo
1.1 Workflow and moderation (max. 6 points) 1. Describe how the research output workflow (and if available research activity workflow) works in the ICT solution. The flow starts with the entry of research output/activity and registering of related metadata and ends when the metadata is validated by a moderator, fields are locked for updates by the user and the output including metadata is uploaded to the repository. Please include in the workflow description the handling process of incorrect metadata (noticed by the moderator) and options that are available to support moderation such as task list overview, task status, notifications. 2. Describe how the ICT solution provides functionality to indicate which users are authorised researchers as a condition for external publication of the personal profile. Fontys only wants to provide employees an external personal profile when they meet the criteria of a researcher, such as research quality.	2 pages A4 (single sided), (1 page per question) + supplementary screenshots.	Yes (30 min)
1.2 Reporting module (max. 6 points) Describe what reporting and/or dashboarding functionalities the ICT solution provides. Please include: - The options for report or dashboard customisation, please include what roles can make these customisations. - The aggregation levels available, from an hierarchical perspective; institutional level (Fontys), business unit level (faculties or schools), department level (e.g. research group) etc. and from a non-hierarchical perspective; groups such as research groups, hybrid learning and research environments etc. - The options that the ICT solution provides to visualise the data available, such as the amount of research output per output type measured on a yearly basis over the past 12 months for a specific research group. - The filter options available, such as dates or period, tags.	2 pages A4 (single sided) + supplementary screenshots.	Yes (30 min)

e. The availability of possible dynamic functionalities within the reporting and/or dashboarding functionality in the ICT solution e.g. the possibility to see more detailed reports or information by clicking on diagrams. f. The management of roles that have access to these reports and/or dashboards (e.g. is it possible for a professor to generate a report?). g. The possibilities of how to export source data and who is authorised and how the system admin has access to the ICT system source data.		
1.3 Handling Historical data (max. 3 points) Describe how and what functionality the ICT solution provides to support the handling of historical data. Please include: a. How the ICT solution manages research information when an e.g. an organisational unit (hierarchical or non-hierarchical) becomes inactive. Is it possible to: - change units in a new unit; - merge a unit with an already existing unit; - deactivate/discontinue a unit. b. What information is available in the ICT solution after deactivation or merger of the unit. Please elaborate on how the information of the inactive unit is transferred to an active unit (if applicable), are affiliations to inactive units retained and is the inactive unit still available for e.g. reporting. c. How the solution manages profiles/records of deactivated users and discontinued facilities.	2 pages A4 (single sided) + supplementary screenshots.	No

9.3.4. Sub-award criterion 2: User experience

For Fontys, a good User Experience with the use of the new ICT solution is important. Fontys will test the ICT solution on several topics to assess the user experience. The topics are outlined in the table below, including a brief description and the roles participating in the evaluation.

The evaluators will provide, from their respective roles, a judgment on each topic regarding the UX of the solution.

To facilitate the testing, the Bidder includes the following information to their bid (as appendix E):

- Instructions on how to access the configured UX environment;
- User IDs/passwords for the different roles involved in testing;
- A concise step-by-step plan per topic to execute the tests for the UX. For each topic, the mentioned roles go through the same steps.

The Bidder needs to prepare a configured UX environment to make the UX tests executable and matching daily practice. For this purpose the environment must include sufficient data to support UX tests. This encompasses, but is not limited to, personal profiles, organisational units, research projects, a broad range of research output metadata (minimise scientific output), a broad range of research activities metadata, prizes, facilities information and dataset metadata. In addition to this data the bidder must make the following data available in the ICT solution during the UX tests. This data is provided by Fontys:

- Researcher profiles for the indicated researchers (name, email, address, department are pre-filled).
- Hierarchical and non-hierarchical organisational units.

The Bidder is expected to be present online during the User Experience tests. The environment in which the UX takes place should be directly derived from the standard cloud environment of the Bidder's ICT solution. Therefore, we explicitly do not expect a demo environment showing functionalities that are not yet in use.

For testing, Fontys utilizes its own resources.

Aspects on which each topic (UX) is evaluated count as a whole towards the maximum number of points to be scored for that topic (UX). The response will therefore be assessed in its entirety for each topic (UX).

Basis for assessment:

- User-Friendly (the extent to which the user understands and can easily use the ICT solution without or with limited explanation);
- Intuitive (the extent to which the user finds the system pleasant and logical, resulting in a feeling of recognizable coherence for the end user);
- Clear (the extent of clear structure of screens, fields, and navigation);
- Action-Efficient (the extent to which the desired goal can be achieved with a limited number of actions).

Topic (UX) and max. no. of points	Roles	Time
2.1. Search, modify and add (max. 7,5 points) 1. Search (Testing the search function). 2. Customize personal profile - add personal description & link profile to a research group (non-hierarchical). The personal profile (name, email, address, department are pre-filled) - dummy data 3. Add research output e.g. a toolbox document and send to moderator for approval (Workflow) 4. Add research activities e.g. participation in a peer review as a reviewer 5. Adjust description and priority for presenting on the research portal project 6. Dummy project name, start end date, dummy participants 7. Add impact / testimonial to project, description and source (name/organisation) of testimonial 8. Approve moderator change (Workflow), see also input at moderators point 1.	Researchers and research supporter	The assessors have 1 hour per Bidder. Parallel with 3: Moderation.
2.2. Reporting (max. 5 points) 1. Be able to filter and add data elements when making a report or dashboard. 2. Generate report in PDF at research group level (non-hierarchical) and business unit level (hierarchical)	Research manager / professor	The assessors have 20 minutes per Bidder. This test takes place separately.
2.3. Moderation (max. 2,5 points) 1. Moderation of an added research output and related metadata. Retrievable from user input. 2. Sending modifications back to the user for approval. 3. Approve added research output and related metadata. 4. Make field available again for user modifications after it is locked.	Moderators and data stewards	The assessors have 1 hour per Bidder. Parallel with 1: Search, modify and add

9.3.5. Sub-award criterion 3: RIS functionalities

The research information system is an important source of information for Fontys. The Bidder needs to meet the must have requirements as described in the MS Excel document "Fontys Research Information Specifications. This documents also indicates an overview of the nice to have attributes.

This sub-award criterion consists of two topics. Topic 3.1 concerns the nice to have requirements. Topic 3.2 concerns the data model interface. In the tables below, it is specified per topic what needs to be submitted with the Bid for the tender. The response to both topics must be added as Appendix F to the Bid. Topic 3.2 is also designated to be shown during a demonstration (details indicated in the table below). In the demonstration you are invited to show:

- a. How the required entities and attributes are effectively represented in the ICT solution and research portal. Please include how the entities are interlinked.
- b. Insight into your suggested design/blueprint of the ICT solution. Especially focus on the effect of functionalities that require non-standard design choices, configurations or custom modifications.

The demonstration is maximised to 30 minutes including explanatory questions and answers.

Topic and max. no. of points	Format	Demo
3.1 Nice to have attributes (max. 10 points) Please indicate in de the MS Excel document "Fontys Research Information Specifications" whether the ICT solution provides the <u>nice to have</u> requirements (Yes or No).	Appendix 3 Fontys Research Information Specifications"	No

Please indicate whether the specified attributes (both the must-have attributes and nice to have attributes) are supported by the ICT solution. For the nice to have attributes, the Bidder can earn points.		
Assessment methodology nice to have requirements: For this topic, a total of 10 points can be achieved. There are 40 nice-to-have requirements. A score factor has been assigned to each nice to have attribute (ranging from 1 most important to 3 least important). Based on the provision or lack thereof of the nice to have functionalities combined with the score factor, a final score (cel F36) is determined for sub-award criterion 3.1).		

Topic and max. no. of points	Format	Demo
3.2 Data model interface (max. 20 points) Describe to what extent the solution provides a sound and comprehensive basis for Fontys to register its research information. Taking into consideration that Fontys is a university of applied sciences and from that perspective has a large variety of research output (mostly non-scientific) and especially wants to showcase research projects. Elaborate on how the ICT solution provides a logical and coherent design for applied science research information, especially when non-standard design choices, configurations or custom modifications are required. Please include: - How the entity model³ and the logical data model⁴ of the ICT solution match the Fontys Research Information System requirements (appendix 3). Please include the entity model and the logical data model of the ICT solution as an attachment and visually indicate in the logical data model deviations from the standard data model and/or necessary configurations. Elaborate on these deviations in written text, especially focussing on the effect of functionalities that require non-standard design choices, configurations or custom modifications⁵. - How the interface of the ICT solution and research portal effectively represent the required entities and their attributes as outlined in the Fontys Research Information System requirements. Especially focussing on the effect of functionalities that require non-standard design choices, configurations or custom modifications. Please also indicate how the information that is of interest for a university of applied science is represented in the ICT solution as well as the portal. Include print screens of deviations from standard use of the ICT solution (if necessary). - Describe the (long term) effects or risks including mitigation measures of functionalities that require non-standard design choices, configurations or custom modifications. For example what are possible effects in case of changes to the application, additional requirements that were not taken into consideration during the implementation e.g. grant management.	4 pages A4 (single sided) + entity model + logical data model + supplementary screenshots	Yes (30 min)
Aspects on which this topic is evaluated count as a whole towards the maximum number of points to be scored for this topic. The response will therefore be assessed in its entirety for this topic. Basis for the evaluation: - The extent to which the ICT solution provides a sound, comprehensive and futureproof basis for Fontys to register its research information. - The extent to which the ICT solution has a logical and coherent design for applied science research information. - The extent to which the effects of non-standard design choices, configurations or custom modifications can be mitigated to minimise potential risks to Fontys. - The extent to which the response is specific and complete.		

³ A entity model or Entity Relationship Diagram (ERD) is a type of chart that illustrates how "entities" relate to each other within a system.

⁴ A logical data model is a type of data model that describes data elements in detail and is used to develop visual understandings of data entities, attributes, keys, and relationships.

⁵ Modifications to the software will become part of the standard (COTS) solution no later than 6 months after GO live of phase 1.

9.3.6. Sub-award criterion 4: Research portal

Fontys feels it is vital to present its research data effectively to the outside world via a research information portal. Bidders are asked to provide a demonstration addressing (at minimum) the following points:

- A. Functionality of the research portal
 - Presentation of entities and attributes within the portal
 - Searchability and navigability of research information (interlinked information)
 - Search and filter options within the portal
 - Additional functionalities (that are not specifically requested by Fontys) proposed by Bidder that are considered valuable for a university of applied sciences and that are provided as standard functionalities included in the Bid.
- B. Setting up and linking to the research portal
 - Possibilities for alignment with the Fontys house style (see section on the Fontys corporate branding brandbook, par. 3.1.13).
 - Possibilities for switching (standard) elements of the research portal on and off, e.g. when they are not relevant.
 - Flexibility of research portal functionalities for use on external websites, separate from the interface with the research information system.

Bidder's response to the requested topics should be provided in the form of a demonstration. The demos will take place online (30 min).

Aspects on which this sub-award criterion is evaluated count as a whole towards the maximum number of points to be scored for this sub-award criterion. The response will therefore be assessed in its entirety for this sub-award criterion.

- Basis for the evaluation:
 - Completeness: the extent to which the stated requirements are addressed by the capabilities of the ICT solution;
 - Functionality: the extent to which the research portal is qualitatively effective in fulfilling the functional requirements (better meets the Client's need and/or provides concrete added value).
 - Accessibility: the extent to which users can easily find and access information.
 - Alignment with house style: the extent to which the solution can be harmonised with the Fontys corporate branding.
 - Coherence: the extent to which the portal is a logically coherent whole, as seen from a user perspective.

9.3.7. Sub-award criterion 5: Training, instruction & support

Fontys is looking for a partner that provides qualitative training (train-the-trainer), training materials, instruction materials and support materials.

In the response, the Bidder is asked to address the following points:

- A. Describe how Fontys trainers (administrators and key-users) will be trained by the Bidder (from a train-the-trainer perspective).
- B. What training & instruction materials are available and in what form, specify how Fontys can make optimal use of the available materials.

Additionally, the Bidder is requested to provide the following documents:

- A sample of the training materials, that is representative of the complete set of available training materials. A sample of the instruction materials, that is representative of the complete set of available instruction materials. The complete API interface documentation (preferably a link to the documentation).
- A functional documentation example that is representative of the complete set of documentation.
- A example of release notes that is representative.

The response must be added as appendix G to the Bid. The response may not exceed 1 page of A4 size (single sided) excluding the examples. The provided examples must be relevant (representative) and limited in size.

Aspects on which this sub-award criterion is evaluated count as a whole towards the maximum number of points to be scored for this sub-award criterion. The response will therefore be assessed in its entirety for this sub-award criterion.

Basis for assessment training, instruction & support:

- Quality of the explanation and material (supplementary examples).
- Quality of training & instruction approach (train-the-trainer).
- The extent to which the response is specific and complete.

9.4. Final score

The sum of the points obtained for the award/sub-award criteria provides the final total for the Bid in question.

In case of identical scores, the number of points allocated for the Award Criterion of Quality will be decisive. If this rule does not yield a winner, the winner will be selected by drawing lots between the Bidders with an equal number of points. Representatives of the parties involved may be present at this drawing.

Based on all available information, the evaluation committee will arrive at an overall evaluation and choice. This is the Bidder who meets all the requirements and has achieved the highest final score.

9.4.1. Verification

The Bidder with the most points may be invited for an interview to discuss the submitted Bid and to verify the information provided. In preparation, the Contracting Authority will identify components for which the information provided by the Bidder must be verified or for which supporting documents or further information must be submitted by the Bidder.

If it is revealed that what the Bidder has stated or offered is incorrect, the Contracting Authority has the right to exclude the Bidder from participation or, if the Contract has already been concluded, to terminate the Contract with immediate effect.

If a Bidder is excluded, the evaluation scores of the remaining Bidders will be recalculated.

Contracting Authority then has the option to continue the procedure with the Bidder who finished second, third and so on. The relevant Bidder will be liable for damages as such.

All costs incurred to reach a new Contract will be recovered, without prejudice to other rights. By submitting a Bid for this tender, you the Bidder explicitly agree to this.

10. Appendices

Background information for the Bidder	
Appendix 1	Draft Agreement including Appendices: <i>1A: Processing Agreement</i> <i>A-1: Concerning the processing</i> <i>A-2: Standard Contractual Clauses processing in the USA</i>
Appendix 2:	Draft standby agreement
Appendix 3:	Fontys Research Information Specifications
Appendix 4:	Research Informations interfaces (figure 4)

Complete and submit to TenderNed along with Bid	
Appendix A	European Single Procurement Document (ESPD)
Appendix B	Reference statement
Appendix C	Price sheet
Appendix D	Response to sub-award criterion 1: Use cases 1. Use case 1: Workflow and moderation (format of your choice) 2. Use case 2: Reporting Module (format of your choice) 3. Use case 3: Handling historical data (format of your choice)
Appendix E	Response to sub-award criterion 2: User experience 1. UX 1: Search, modify and add (format of your choice) 2. UX 2: Reporting (format of your choice) 3. UX 3: Moderation (format of your choice)
Appendix F	Response to sub-award criterion 3: RIS functionalities 1. Fontys Research Information Specifications (appendix 3 completed) 2. Response topic data model interface (format of your choice)
Appendix G	Response to sub-award criterion 5: Training, instruction & support (format of your choice)