

# Request for Quotation

RFQ for the provision of secretarial and coordination support for REFEDS

Date of Issue: 01 May 2019

Dissemination Level: GÉANT Public

Owner: REFEDS

Version: 1.00

Reference Number: 2019-refeds-support

## 1 Definitions

| Terms                            | Definitions  |
|----------------------------------|--|
| <b>Attachment</b>                | A document made available to Bidders in relation to this procurement.  |
| <b>Bidder</b>                    | A Supplier submitting a tender for the supply of the requested Services.   |
| <b>Commencement Date</b>         | The date the Services start to be delivered.   |
| <b>GÉANT</b>                     | <p>The contracting party, GÉANT, who is inviting Suppliers to participate in this procurement process.</p> <p>GÉANT Vereniging is a not-for-profit organisation, owned by its core membership of 41 NRENS. More information on the GÉANT Project and GÉANT Network can be found at <a href="http://www.geant.org">www.geant.org</a>.</p> |
| <b>Service(s)</b>                | The services as described in this document, which the supplier has agreed to offer under the standard contractual terms supporting the supply of goods and / or services and which GÉANT has instructed the Supplier to carry out in an order.   |
| <b>Solution</b>                  | A Supplier's response to GÉANT's RFQ in the form of an offer capable of acceptance made by the Supplier as a proposal to meet the requirements set out in this document.   |
| <b>Statement of Requirements</b> | A statement issued by GÉANT detailing its Service requirement issued in accordance with the RFQ.   |
| <b>Supplier</b>                  | An Economic Operator and could be a registered company, charitable Organization, Voluntary Community and Social Enterprise, Special Purpose Vehicle or other form of entity, who is capable to offers the requested Services.  |
| <b>Tender</b>                    | The bid(s) prepared and submitted by Bidder in response to this RFQ).  |

## 2 Introduction

### 2.1 Contact Person

The contact person for this RFQ is:

Nicole Harris

Head of Trust and Identity Operations

T: +31646105395

E: nicole.harris@geant.org

### 2.2 About GÉANT and REFEDS

GÉANT (previously known as DANTE was established in 1993, to coordinate pan-European research and education (R&E) networking on behalf of Europe's NRENs. Since then, our role has evolved to that of a true services innovator, incorporating network planning, procurement, build and operation, as well as coordination of research programmes and development of innovative services. Working with NREN partners and the European Commission (EC), the high-speed networks that we build and operate connect NRENs to each other and to the rest of the world, enabling scientists, academics, innovators and students to collaborate across dedicated networks, regardless of their location.

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GÉANT Vereniging, the legal entity for GÉANT is a not-for-profit organisation based in The Netherlands, owned by its core membership of 36 NREN organisations and NORDUnet, which participates on behalf of 5 Nordic NRENs.

REFEDS (Research and Education Federations) is an international community addressing the need of existing and emerging identity federations in the education and research sector worldwide to collaborate on policy issues. REFEDS operates under the GÉANT Association umbrella. REFEDS is supported by a secretariat consisting of employees from the GÉANT Amsterdam Office and other expert staff subcontracted by GÉANT. This team is led by the REFEDS Coordinator, who is a member of staff from GÉANT.

REFEDS main focus is on policy issues, particularly those concerning inter-federation collaboration of SAML-based federations. REFEDS confines its activities to the production of guidelines and best practices, mainly concerning federation policies in higher education.

### 2.3 Background

In order to support its work and operations, REFEDS is seeking quotations for secretarial and coordination work for REFEDS for the period **01 August 2019 – 31 July 2022**. The successful bidder will work closely with the REFEDS Coordinator to ensure that the annual workplan for REFEDS is delivered in a timely manner and that the community is supported in its events, working groups and activities. For the above stated period GÉANT will draft a contract based on the terms and conditions as stated in section 3.2.

### 2.4 Objective of this Procurement

The objectives for this procurement are as follows:

- To ensure that REFEDS meets its goals for REFEDS coordination and management, including support for REFEDS meetings, the REFEDS blog and the REFEDS wiki and websites and REFEDS reports.
- To support the operation of REFEDS Working Groups to enable the groups to meet, coordinate and reach their goals.
- To support REFEDS schema and specification management, ensuring that documents are kept up to date and change requests are managed in an effective way.

All REFEDS goals and objectives are described on the REFEDS website and in the REFEDS Annual Workplan that can be found at: <https://wiki.refeds.org/display/WOR> and <https://refeds.org/about>.

### 3 Statement of Requirements

#### 3.1 Procurement plan

Below indicated procurement plan, provides an overview of the key stages and dates in this procurement. GÉANT reserves the right to change these dates as necessary, although it will seek to minimise any changes.

- |  |              |
|--|--------------|
| 1) RFQ issued:                           | 01 May 2019  |
| 2) Deadline for clarification questions: | 17 May 2019  |
| 3) Deadline for submitting answers:      | 24 May 2019  |
| 4) Deadline for Quotation responses:     | 03 June 2019 |
| 5) Contract evaluation / awarded:        | 01 July 2019 |
| 6) Commencement Date:                    | 29 July 2019 |

#### 3.2 Conditions of Contract

For the supply of the requested Services for values below the EC thresholds, the standard contractual terms supporting the supply of goods and / or services of GÉANT Association are applicable. These terms can be downloaded from: [https://www.geant.org/About/Joining\\_GEANT/Pages/Terms-and-Conditions.aspx](https://www.geant.org/About/Joining_GEANT/Pages/Terms-and-Conditions.aspx).

Applicable taxes are extra and must be itemized separately in your proposal and all and any additional costs must be detailed in your quotation.

GÉANT terms must be accepted to submit a quote. Specific details surrounding deliverables and milestones can be included in the Annexes to the resultant agreement but wholesale substitution of GEANT terms is not acceptable.

#### 3.3 Specification

##### 3.3.1 Background

REFEDS is an active community of identity federation operators and other interested parties within research and education. In order to support this community, REFEDS maintains a secretariat to coordinate activities and deliver outputs on behalf of the community. This work is funded through sponsorships from community members. The role of the supplier will be to support the REFEDS Coordinator in delivering this secretariat function against the objectives described in section 2.4 above.

##### 3.3.2 Scope

Work is expected to be carried out remotely and the supplier is expected to attend regular video conference meetings with the REFEDS Coordinator, REFEDS Steering Committee and the REFEDS Community as expected. The supplier will be expected to travel to REFEDS meetings twice per annum. Other travel may be considered within the parameters set out in section 3.3.4 below.

It is not expected that the supplier will be required to manage personal data as part of this contract, but should this situation arise the supplier must be able to sign a data processing agreement with GÉANT.

GÉANT will award the proposal deemed to be the most economically advantageous tender following evaluation against the following criteria:

- Appropriateness and Overall Value to the community (25%);
- Quality of Proposal and Robustness of Workplan (25%);
- Engagement with the Community (20%);
- Pricing (15%);
- Previous experience of the project team (15%).

The following scoring mechanism will be used:

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| Score | Criteria  | Judgement                           |
|-------|---|-------------------------------------|
| 6     | Response provides a clear and comprehensive solution to GÉANT's requirements and brings significant added value and benefit to the project, which is supported by evidence (where relevant) and which presents no concerns in relation to deliverability and/or performance and/or transfer of risk to GÉANT. | Exceeds the stated requirements     |
| 5     | Response provides a clear and comprehensive solution to GÉANT's requirements, which is supported by evidence (where relevant) and which presents no concerns in relation to deliverability and/or performance and/or transfer of risk to GÉANT.   | Fully meets the stated requirements |
| 3     | Response provides clear and comprehensive solution to GÉANT's requirements but there are minor deficiencies in the evidence provided (where relevant) and minor concerns in relation to deliverability and/or performance and/or transfer of risk to GÉANT.   | Minor Reservations                  |
| 1     | Response provides a solution to GÉANT's requirements but there are major deficiencies in the evidence provided (where relevant) and major concerns in relation to deliverability and/or performance and/or transfer of risk to GÉANT.   | Significant Reservations            |
| 0     | The response does not meet requirements.  | Not Answered / Unacceptable         |

GÉANT reserves the right not to award a Contract.

### 3.3.3 Specifications

The supplier will be expected to support the following work items:

- **REFEDS Coordination and Management** – to progress REFEDS position as an important player within the access and identity management space internationally, and to help build on established relationships with GÉANT project, ISOC, the Kantara Initiative, and other organizations as determined by the REFEDS Steering Committee.

| Requirements   | Deliverable                  | Milestone  |
|--|------------------------------|--|
| Coordinate two REFEDS meetings a year. See: <a href="https://refeds.org/meetings">https://refeds.org/meetings</a>                  | n/a                          | June and December meetings   |
| Annual REFEDS Survey. See: <a href="https://wiki.refeds.org/display/OUT">https://wiki.refeds.org/display/OUT</a>                   | Survey Questions and Summary | September release of survey  |
| Annual REFEDS Workplan. See: <a href="https://wiki.refeds.org/display/WOR">https://wiki.refeds.org/display/WOR</a>                 | Workplan                     | February release of workplan   |
| Annual REFEDS Report. See: <a href="https://refeds.org/our-work/documents">https://refeds.org/our-work/documents</a>               | Report                       | February release of report   |
| REFEDS Steering Committee meetings. See: <a href="https://wiki.refeds.org/display/STEER">https://wiki.refeds.org/display/STEER</a> | n/a                          | 4 – 6 meetings per year including agenda creation, note taking, action log, and other meeting support. |

To achieve these aims, the supplier will need personnel who can meet the following skillset: project management, community building, excellent written and communication skills. Prior Knowledge and understanding of the R&E trust and identity community and named partners. Supplier will be required to work with confluence and wordpress.

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- **REFEDS Specialist Working Groups** – provide lightweight coordination support to the REFEDS Working Groups to enable them to operate according to the processes detailed in the REFEDS Participant’s Agreement and in the Charters for each Working Group.

| Requirements   | Deliverable   | Milestone                                   |
|--|---|---|
| Quarterly Report. See: <a href="https://wiki.refeds.org/display/GROUPS">https://wiki.refeds.org/display/GROUPS</a> | Short quarterly reports on progress of REFED Specialist Working Groups for each REFEDS Steering Committee meeting in the contract period (4 meetings). All working group meetings are via video conference. | Every first or second week of a new quarter |

To achieve these aims, the supplier will need personnel who can meet the following skillset: project management, community building, excellent written and communication skills. Knowledge of SAML, identity assurance, security incident management. Supplier will be required to work with confluence and Wordpress.

- **REFEDS Promotion and Communication** – work with the REFEDS community and REFEDS coordinator to develop blog-posts on appropriate and relevant topics throughout the terms of the contract.

| Requirements   | Deliverable   | Milestone    |
|--|---|--------------|
| REFEDS blogposts. See: <a href="https://refeds.org/blog">https://refeds.org/blog</a>   | 6 blog pieces featuring write-ups from federations or other interesting initiatives within the community. | To be agreed |
| Additional supporting communication pieces. See: <a href="https://www.geant.org/News_and_Events/CONNECT">https://www.geant.org/News_and_Events/CONNECT</a> | 2 pieces for CONNECT magazine or other appropriate publication  | To be agreed |

The above milestones will be discussed after the awarding and will be incorporated in the contract.

To achieve these aims, the supplier will need personnel who can meet the following skillset: technical editorial experience and marketing experience. Excellent written and communication skills. Supplier will be required to work with confluence and wordpress.

- **Standards and Specifications** – provide support for the development of standards and specifications under the REFEDS banner (such as SCHAC), and coordinate any requirements gathering for implementation efforts. Review and evolve, if necessary, processes to ensure specification and schema sustainability.

| Requirements  | Deliverable  | Milestone   |
|---|--------------|---|
| Quarterly Progress Reports on eduPerson / SCHAC schema developments   |              | Within 2 weeks after the Quarterly REFEDS meetings.   |
| Manage manage change requests for REFEDS specifications as required and produce regular reports on the status of specifications and community proposals. See: <a href="https://wiki.refeds.org/display/STAN">https://wiki.refeds.org/display/STAN</a> | as required. | n/a   |
| Support between 2 – 4 REFEDS Editorial Board meetings a year. See: <a href="https://wiki.refeds.org/display/STAN">https://wiki.refeds.org/display/STAN</a>  | n/a          | 2 – 4 REFEDS Editorial Board meetings a year, including agenda creation, note taking, action log and other meeting support. |

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To achieve these aims, the supplier will need personnel who can meet the following skillset: knowledge and understanding of SAML metadata schema, eduPerson, SCHAC. Technical editorial experience. Experience with working and supporting specifications and standards.

Additional work may be agreed with the supplier as long as this can be delivered within the 200 hours per annum / total budget permitted for this contract. Please see **3.3.4 hours and pricing** for more information. The Supplier will report to the REFEDS Coordinator as to the progress of the work and/or outstanding issues on a monthly basis via VC call or other agreed method of communication.

Please use the following boxes or complete these questions in a separate document to submit your proposal.

| Provider Name | GEANT Association Terms and Conditions Accepted (Yes or No) |
|---------------|---|
|               |   |

| Q1 – Proposal   |
|---|
| <p>Please outline how you will deliver the work outlined in this RFQ.</p> <p><i>Please enter your response in the box below or in a separate Appendix. [ Make 4 sides of A4].</i></p> |
| <p><a href="#">Click here to enter text.</a></p>  |

| Q2 – Experience and Track Record  |
|---|
| <p>Please give examples of your previous work, experience with the community and how this will be relevant to this contract.</p> <p><i>Please enter your response in the box below or in a separate Appendix. [Max 1 side of A4].</i></p> |
| <p><a href="#">Click here to enter text.</a></p>  |

| Q3 – Pricing   |
|--|
| <p>Please give a pricing quote within the parameters shown below. Proposals will be reviewed based on Most Economically Advantageous Tender. Please see marking criteria in <b>3.3.2 Scope</b>.</p> <p><i>Please enter your response in the box below or in a separate Appendix. [Max 1 side of A4].</i></p> |
| <p><a href="#">Click here to enter text.</a></p>   |

### 3.3.4 Hours and Pricing

Proposals should clearly state the rate per hour for the consultancy and a proposal for how hours will be allocated to work items. Payment will be in monthly instalments invoiced in arrears, linked to deliverables / milestones. A maximum budget of 28,000 euros per annum is available for this work. Payment by GÉANT will be within 30 days of receipt of invoice when the deliverables and milestones as specified in section 3.3.3. are met and accepted.

Up to 4000 euros will be made available for travel per annum. All travel must be agreed with the REFEDS Coordinator before being undertaken and must be billed against the GÉANT Travel Policy rules. Please see the summary below:

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| Cost                    | Claimable   |
|-------------------------|---|
| <b>Hotel cost</b>       | Where accommodation is not provided. Actual cost will be reimbursed up to 150 euros per night including breakfast.<br>A total of 3 nights (accommodation) may be claimed. |
| <b>Air travel</b>       | All air travel should be Economy Class flights.   |
| <b>Rail travel</b>      | All rail travel should be second class rail.  |
| <b>Local travel</b>     | Most efficient and reasonably priced method of travel between point of arrival (airport, train station), hotel and venue.   |
| <b>Travel Insurance</b> | Actual cost up to a limit of 20 euros for 6 days travel.  |
| <b>Lunch</b>            | If not provided. Actual cost up to a limit of 18 euros per day.   |
| <b>Dinner</b>           | If not provided. Actual cost up to a limit of 50 euros per day.   |
| <b>Travel Visa Fees</b> | May be supported by scans of Visa in passport showing cost.   |