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Section: Foreword

TENDERING SPECIFICATIONS

TAXUD/2016/AO-01

for the provision of IT services for Transeuropean systems management and coordination

ITSM3 Transeuropean (ITSM3 TES)

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1. FOREWORD

The present Call for Tenders will be managed as described in the Guidebook for Tenderers 'Submitting an offer in response to a call for tenders issued by the Directorate General of Taxation and Customs Union', which is an integral part of the present Tendering Specifications (Annex 4).

2. BACKGROUND

DG TAXUD needs to renew the contractual sourcing for IT operations and IT service management. As of today, the contractual structure for these services is covered by three distinct Framework Contracts, each one being a separate Lot of the Call for Tender **ITSM2** launched in 2012 (reference: TAXUD/2010/AO-13).

While it is the intention of **DG TAXUD** to keep the structure of three Framework Contracts and the overall distribution of services among them to source its IT Service Management services, **DG TAXUD** is issuing three separate Call for Tenders as to minimise the risk associated to Handover / Takeover between the incumbent and future contractors.

The following table summarises the past and future procurements processes.

Ten	Call for ders 010/AO-13	On-going Call for Tenders	Overall Services
	Lot1	ITSM3 Operations	IT service management, infrastructure and operations (closed on 15/03/2016)
ITSM2	Lot2	ITSM3 Transeuropean*	Trans-European systems management and coordination
	Lot3	ITSM3 Integration	Operations integration & control, consultancy and architecture

^{*} Object of the present Call for Tenders (TAXUD/2016/AO-01). **ITSM3 Transeuropean** and **ITSM3 TES** are synonyms.

Although the three **ITSM3** contracts will follow separate Call for Tenders procedures they will synchronise at the moment of Takeover and it is the objective that they enter into operational mode in a rapid sequence.

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2.1. IT organisation in DG TAXUD

DG TAXUD is responsible for the Customs and Taxation policies of the EU. The Taxation policy includes the Excise, Indirect, and Direct Taxation policies. These policies address mainly the EU but have international dimensions as well (for instance specific agreements with third countries like the United States or Russia).

DG TAXUD provides the National Administrations¹, economic operators², citizens and the Commission internal staff with a wide portfolio of IT services. The quality of these services is critical for the sustainability of EU policies and objectives in the field of Customs and Taxation.

The **Information Technology Steering Committee (ITSC)** of **DG TAXUD** acts to ensure high-level approval and authorisation for IT projects in line with the principles of good management and financial governance, under the overall supervision of the IT governance bodies of the Commission.

The **Stakeholders** for **DG TAXUD**'s IT systems are the Commission, National Administrations of Member States and third party countries (e.g. United States), the trader community and the public in general.

The two **DG TAXUD**'s Information Technology Units (**A5** and **C5**) are responsible for administering the computerisation activities of **DG TAXUD**, in line with the policies of the DG and the IT policies of the Commission. This includes the provision of business-critical operational services and central IT systems necessary for the support of the National Administrations and Commission services and the management and coordination of Transeuropean systems.

The **missions** of the Information Technology Units are to:

- Operate and develop secure Information Systems (IS) and transmission services appropriate to business users in **DG TAXUD**, Commission services, National Administrations of Member States, third party countries and in the society at large;
- Assist the National Administrations in deploying trans-European systems and facilitate IT collaboration amongst them;
- Maintain and develop a coherent Information Systems Architecture compliant with the Commission standards policy, allowing interoperability of administrations in the EU and partner countries for the benefit of the customs and taxation policies;
- Provide and support efficient office automation facilities for approximately 550 staff of the **DG TAXUD**.

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The term National Administrations (NAs) encompasses all National Administrations that have IT obligations to fulfil Union customs and taxation policies, in all Member States, Candidate and Accession countries and in non-EU NAs as specified in EU customs and taxation policies.

The terms 'economic operators', 'traders' and 'businesses' are used as synonyms in the context of this document.

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The Unit C5 'Taxation Systems & IT Compliance' is divided in four sectors:

- Resources and governance sector (C5/PS) is a 'horizontal' sector involved with governance, budget, contracts and project management, human resources and support to other sectors of DG TAXUD IT Units from a Quality Assurance and Quality Control perspective; C5/PS will be in charge of the management of the relationship between DG TAXUD and the ITSM3 TES contractor:
- IT services for Indirect taxation and operations sector (C5/ITO) advises, defines, develops and maintains, in close co-operation with the Member States and the policy units of **DG TAXUD** in charge of indirect taxation, the trans-European systems necessary for the implementation of indirect taxation policies. The sector also supervises the operation of direct and indirect taxation IT systems by co-ordinating with the Member States to ensure the constant level of quality and correct functioning of these trans-European systems during their operational phase;
- IT services for Direct Taxation and taxation IT enterprise architecture sector (C5/DTEA) advises, defines, develops and maintains, in close co-operation with the Member States and the policy units of DG TAXUD in charge of direct taxation and recovery of claims, the trans-European systems or other IT systems necessary for the implementation of direct taxation policies. The sector is also in charge of the IT collaboration with Member States for direct and indirect taxation, to develop enterprise architecture and plan that allows better collaboration between Member States for the common addressing of identified IT challenges;
- The Local Informatics Security Officer (LISO) defines the DG TAXUD-specific Information Security Policy, oversees the development of security plans approved by DG TAXUD and monitors their implementation, develops information security awareness and training programmes, maintains an inventory of information systems, with a description of security needs, advises and reports on information systems security matters.

The Unit A5 'Customs Systems & IT Operations' is divided into three sectors:

- Infrastructure & Service Delivery sector (A5/ISD) is responsible for:
 - Managing the infrastructure used by the Information Systems in support of customs and taxation policies and DG TAXUD specific administrative processes;
 - Assuring continuity of operation and disaster recovery of the IT functions;
 - Operating the infrastructure allowing interoperability of administrations in the EU and partner countries for the benefit of the customs and taxation policies (CCN / CCN2);
 - o Managing the IT Operations according a Confidentiality/Integrity/Availability compliance framework:
 - Designing and implementing the IT operation processes in DG TAXUD and all its suppliers;
 - Supervising the provision of office automation services (supervise the supply
 of office automation equipment, user support, helpdesk, management of IT
 logistics including acquisition, move and decommissioning);

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• **Customs IT systems sector (A5/CIS)** is responsible for:

- The system development life-cycle of all customs IT systems;
- The maintenance of the operational planning for systems development and deployment;
- The co-ordination of the implementation and maintenance of all customs IT systems in EU, in collaboration with internal and external stakeholders;
- The supervision of their operational functioning and the production of related statistics, dashboards, etc.;
- o The system development life-cycle methodology for all customs IT systems;
- o The application development framework of all customs applications;
- o The maintenance of a repository of all artefacts of customs IT systems;
- The overall customs IT architecture and IT strategic plan;

• Enterprise IT architecture and Strategy sector (A5/EAS) is responsible for:

- Providing assistance to customs business units for the correct use of the modelling tool ARIS;
- Maintaining in ARIS, in close co-operation with the customs business units and CIS, a coherent view of the enterprise architecture, including its business data, business processes, business rules and technical IT plan;
- Providing advice to customs policy units for the optimal use of IT in reaching their policy objectives; to assure this duty, the section shall represent the unit in co-ordination groups created either internally or with the participation of Member States in view of policy co-ordination and development;
- The technical studies, architecture, development and maintenance of the CCN, CCN2, SPEED2 (and related Business Flows), as well as UUM&DS platforms;
- Participation in the triangle (three sectors) of architects whose purpose is to guarantee the overall coherence of IT architecture of Unit A5 within DG TAXUD;
- Preparing, organising and chairing the governance body with MS for middleware projects and systems CCN/CSI, CCN2 and UUM&DS ('IT Technology & Infrastructure Group');
- Participating in the preparation of the unit's involvement in governance bodies, such as the ECCG, the IT Steering Committee, the Customs Management Committee, etc.

In addition to the above, **DG TAXUD Unit A3 'Customs processes & project management'** is in charge of **UCC and BPM functional structure** to define, in close cooperation with the Member States, the requirements and business process models of the customs IT systems related to the Union Customs Code (UCC) with its delegating and implementing provisions.

This description reflects the situation applicable at the time of publication of this call for tenders. Some changes in this organisation may occur until the start of the Framework Contract and during the course of the **ITSM3 TES** contract.

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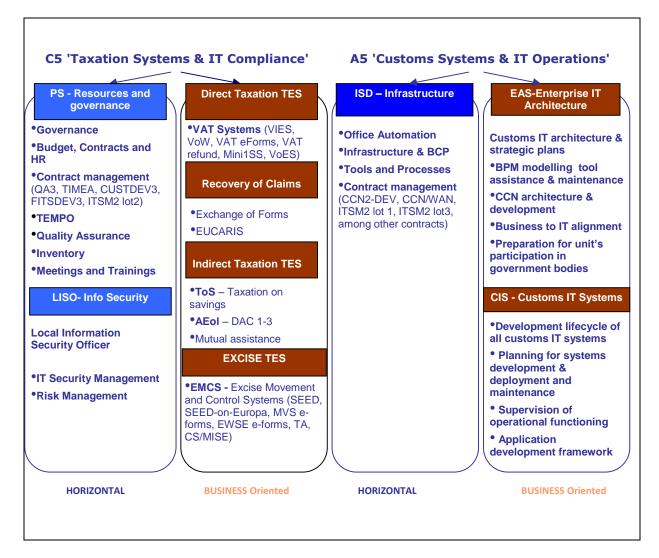


Figure 1: IT organisation in DG TAXUD

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2.1.1. The IT value chain

The IT value chain of **DG TAXUD** is depicted below:

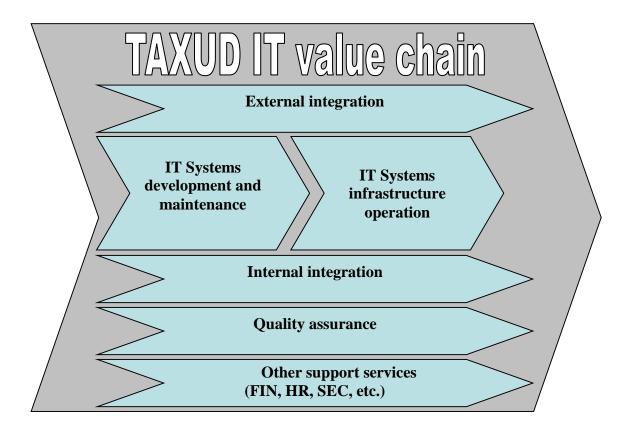
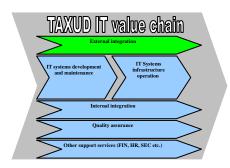


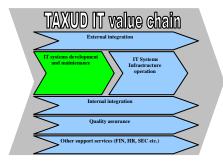
Figure 2: DG TAXUD IT Value Chain

Hence, essentially the ITSM3 TES (replacing ITSM2 Lot2) deals with 'External integration' while ITSM3 Operations (replacing ITSM2 Lot1) contractor deals with the IT systems, infrastructure and operations and ITSM3 Integration (replacing ITSM2 Lot3) with 'Internal integration'.

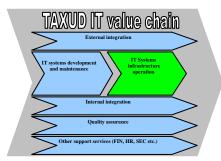
Section: Background



External Integration is defined as the set of activities that are needed to integrate **DG TAXUD**'s IT systems with those of the NAs to deliver the expected business solutions. These comprises the management of the deployment and operations of TES and IT Services of the Commission from a business perspective and the assistance to **DG TAXUD** concerning specifications of the TES and IT services, IT collaboration amongst National Authorities, project and service level management and support of working groups, workshops, meetings and trainings.

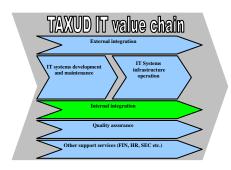


<u>IT systems development and maintenance</u> is one of the two main production activities of the IT units of **DG TAXUD**, it includes the multitude of development and maintenance activities for all Customs, Taxation, Excise systems as well as for CCN.

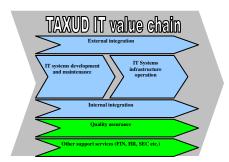


<u>IT systems infrastructure operation</u> is the second main production activity of the IT units of **DG TAXUD**, providing:

- The operations of all applications;
- A stable, documented, managed and secure ICT infrastructure;
- The set-up and maintenance of harmonised processes and service management tools.



<u>Internal integration</u> is the set of activities that **TAXUD/A5** has to do <u>internally</u> to streamline and harmonise its architecture and services delivery. Much of this process is supported by **TEMPO**, internal governance arrangements, planning, reporting etc. However, the operational interactions between **DG TAXUD** and its suppliers and among its suppliers themselves are insufficiently streamlined whilst this is a key requirement to increase the maturity, efficiency, and effectiveness of the organisation.



Quality Assurance and other support services (FIN, HR, SEC, etc.) are activities and processes that are shared activities between TAXUD/A5 and TAXUD/C5 and performed by the sector TAXUD/C5/PS and TAXUD/C5/LISO. QA is quality assurance and quality control of the IT services and deliverables supplied to DG TAXUD by all its suppliers including conducting regular security and quality audits of them.

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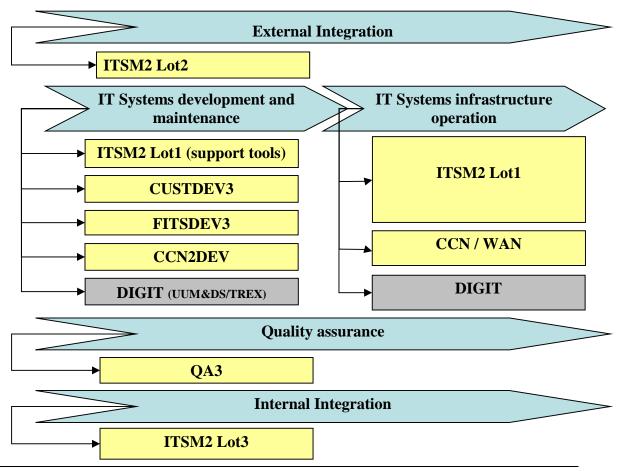
2.1.2. External contractors

DG TAXUD relies on the Commission's DG for Informatics (**DIGIT**) for hosting part of the IT systems and for development of certain systems (e.g. UUM&DS and T-REX). In parallel, **DG TAXUD outsources the bulk of its IT activities to external service providers,** which are contracted through public procurement procedures in compliance with the Financial Regulation (such as this call for tenders). The products and services supplied are all subject to a systematic quality control and testing as part of the acceptance procedures.

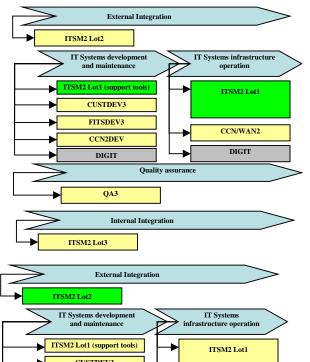
Units **C5** and **A5** rely on several **external contractors** to perform their duties (refer to figure below for a graphical representation of the current contracts):

- Three development contractors (CUSTDEV3 for Customs; FITSDEV3 for Taxation; and CCN2-DEV for CCN, CCN2 and SPEED2 platforms and related business flows);
- Three IT service management contractors (ITSM2 Lot1, Lot2 & Lot3);
- One common network provider (CCN/WAN2);
- One quality assurance/control contractor (QA3);
- Several consulting contractors to perform strategic studies and analysis.

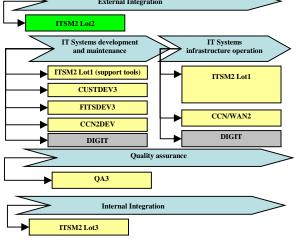
The existing structure of **DG TAXUD** contracts (with the exception of **DIGIT** as there is no contract between **DG TAXUD** and **DIGIT**) is depicted in the diagrams below. Development services are delivered by the **CCN2-DEV**, **CUSTDEV3**, **FITSDEV3** and **ITSM2 Lot1** contracts. Operations rely on **ITSM2 Lot1**, **CCN/WAN** contracts and the data centre services of **DIGIT**.



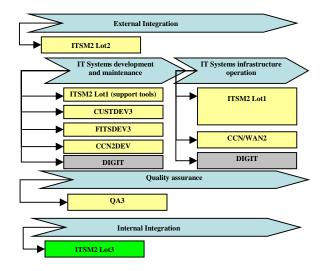
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The ITSM2 Lot1 contractor (to be replaced by ITSM3 Operations) is the current provider of IT Service Management on behalf of DG TAXUD for excise, taxation, and customs business threads, including all CIs / platforms managed by the CCN2-DEV contractor. The contract includes development and maintenance of 'Service Management-related tools'.

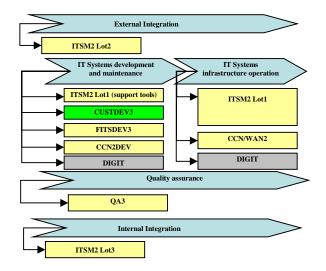


The ITSM2 Lot2 contractor (to be replaced by ITSM3 TES, subject of this call for tender) provides support services for the co-ordination of implementation of trans-European systems in Members States.

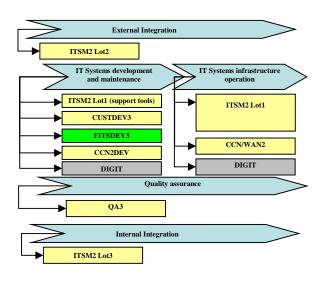


The ITSM2 Lot3 contractor (to be replaced by ITSM3 Integration) provides operations integration and control, including application architecture board, architecture choice, product choice, overall change management across different Lots and benchmarking.

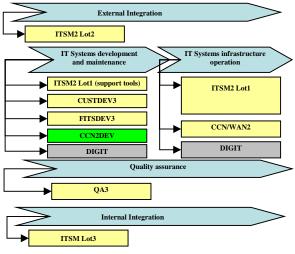
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CUSTDEV3 is a development and maintenance contract, which consolidates all customs-related development. The CUSTDEV3 contractor provides specification, development, maintenance and support services for all customs IT systems.

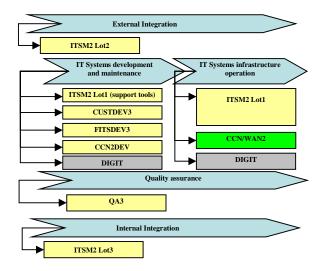


The **FITSDEV3** contractor provides specification, development and maintenance services for the taxation and excise systems and applications.

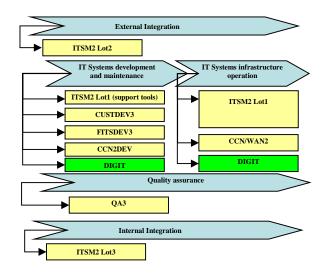


The **CCN2DEV** contractor provides specification, development and maintenance services for the CCN/CSI, SPEED2 and CCN2 platforms.

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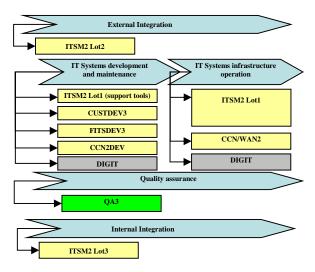


The CCN/WAN2 contractor provides the private secured IP network services of CCN including their maintenance.



DIGIT is the IT General Directorate of the Commission. **DIGIT** has responsibility for the Commission's Data Centre (**DIGIT/DC**) that hosts a number of the **DG TAXUD** IT systems.

DIGIT also provides development and support for UUM&DS & T-REX authentication systems.



QA3 contractor is responsible for TEMPO maintenance, security and quality audits, quality assurance and quality control of the IT services and deliverables provided by the other IT contractors of DG TAXUD. This includes services supplied by the current ITSM2 and the new ITSM3 contractors.

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2.1.3. Interaction rules between the ITSM3 contractors and DG TAXUD

Concerning the **ITSM3 TES** activities (i.e. the subject of this Call for Tenders), it is foreseen that:

- ITSM3 TES is managed by C5 and provide services to A5/Customs Information Systems, C5-ITO/DTEA/LISO, A3/Union Customs Code and on a need basis to other sectors from Unit A5;
- ITSM3 Operations is managed by A5, and provides services to Units A5 and C5;
- ITSM3 Integration is managed by A5, will provide services to Unit A5 and may provide services to Unit C5 as well, upon request.

In terms of demand management, **DG TAXUD** is solely responsible to order services from the **ITSM3** contractors. It means that:

- DG TAXUD orders services from ITSM3 Operations, ITSM3 TES and ITSM3 Integration, relying on Specific Contracts and Request for Actions;
- As ITSM3 TES will use some tools (e.g. Synergia SMT, Test Applications, Monitoring) and some services made available by ITSM3 Operations, ITSM3 TES will report to TAXUD needs to be ordered from ITSM3 Operations to support the ITSM3 TES activities

DG TAXUD Unit R1 'HR and finances' is responsible for the contractual management of all of the contracts in **DG TAXUD**.

DG TAXUD Unit R3 'Management of programmes and EU training' will also be a stakeholder under the three **ITSM3** lots as this unit is responsible for the management and implementation of the Customs 2020 and Fiscalis 2020 co-operation programmes.

2.1.4. Role of QA3 contractor

DG TAXUD is supported by the **QA3** contractor, which performs quality control over the activities of the other IT contractors of **DG TAXUD**.

The **QA3** contractor:

- Coordinates the review by **DG TAXUD** of the **ITSM3** deliverables, and performs technical reviews of these deliverables;
- Monitors the service levels provided by the **ITSM3** contractors;
- Performs (on-site) quality control of the testing activities (functional testing, conformance testing);
- Performs (on-site) audits of the **ITSM3** contractors (quality/security/ad hoc);
- Attends meetings, workshops, training sessions organised by the **ITSM3** contractors.

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The QA3 contractor is also responsible for quality assurance. It maintains the TEMPO methodology, provides technical expertise and assists DG TAXUD for the continuous improvement of its IT maturity and of its contractors.

In this context, the **ITSM3 TES** contractor must be ready to collaborate with the **QA3** contractor.

3. ITSM3 TES SPECIFICATIONS

The specifications for the present Call for Tenders are structured among a set of documents, each with a very specific purpose and which are recommended to be read/consulted in the following order:

- The present **Tendering Specifications** that give an overview of the Call for Tenders purpose, structure and procedures together with a first global understanding of what type of services are required;
- The Questionnaire (Annex 1) is the script that the tenderers need to follow in order to answer the Call for Tenders. It guides the tenderers step by step on what, how and in what order they should answer to the Call for Tenders. Tenderers should answer no more and no less than what is requested in the Questionnaire. It also describes the price elements to be used for pricing the services. The tenderers shall provide the financial aspects of their offer by filling the **Price Table** (Annex 3);
- The **Technical Annex (Annex 2a)** describes the services requested together with the requirements and conditions on which they must be provided. It also describes the Service levels and Quality Indicators that shall be used to measure the level of service;
- The Terms of Reference (Annex 2b) provides a description of TAXUD IT ecosystem; it covers the present situation at DG TAXUD in the context of the services to be provided and an assessment of the evolutions foreseen. Most importantly the terms of reference also underlines the differences between the ITSM2 Lot2 and the ITSM3 TES services;
- A Baseline (Annex 10) of documentation is also provided online with relevant operational documents related to the services currently provided by ITSM2 Lot2 and which shall help the tenderer obtain detailed and complete information of the systems, activities, deliverables, etc. involved in the services. A table of contents of the baseline is also provided as part of Annex 10.

All requirements outlined in the above listed documents are to be considered as the minimal requirements to which the tender has to comply.

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Section: Services and deliverables	

4. SERVICES AND DELIVERABLES

The present call for tenders relates to the provision of **IT services** for the integration of **DG TAXUD** IT systems with those of the National Authorities to deliver the expected business solutions. These support services comprise:

- The management of the deployment and operations of TES and IT Services of the Commission from a business perspective for NAs, traders' communities and other economic operators;
- The assistance to DG TAXUD concerning:
 - Scope definition, systems definition, specifications of the TES and IT services,
 - o IT collaboration amongst National Authorities,
 - o Project and service management tasks,
 - o Service Level Management,
 - o Reporting,
 - Working groups, workshops, meetings and trainings;
- The scope definition, systems definition, specifications, implementation, and operation of Transformation Projects.

Please refer to Annex 2a 'Technical Annex' and Annex 2b 'Terms of Reference' for a complete description of the services and deliverables.

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Section: Assessment of offers	

5. ASSESSMENT OF OFFERS

5.1. Administrative information

For details on conditions and information on documents and administrative information that need to be submitted for each of the companies participating in the offer, please see **Annex 1 'Questionnaire'**.

5.2. Exclusion criteria

The Commission reserves its right to exclude offers which do not meet the exclusion criteria as described in **Section 9.1 of Annex 4 'Guidebook for Tenderers'** and established in **Section 2 of Annex 1 'Questionnaire'**. **Annex 1** also details the information to provide with respect to the exclusion criteria.

5.3. Selection criteria

Tenderers will be selected for the quality assessment only if they can prove that they have (1) sufficient economic and financial capacity, and (2) sufficient technical and professional capacity.

The selection process is described further in Section 9.2 of Annex 4 'Guidebook for Tenderers' and Sections 3 and 4 of Annex 1 'Questionnaire'.

5.4. Award criteria

5.4.1. Technical evaluation

Please refer to Section 9.3.1 of Annex 4 'Guidebook for Tenderers' and Section 5 of Annex 1 'Questionnaire'.

The technical evaluation will be carried out by establishing an overall technical score for the technical proposal that takes into account the individual scores for the award criteria listed in **Sections 5.1 to 5.4 of the Annex 1 'Questionnaire'**.

The quality of the offers will be evaluated by the degree to which they fulfil the requirements as specified in **Annex 2a 'Technical Annex'** and **Annex 2b 'Terms of Reference'**. The importance given to each award criterion is stated in weight (percentage) and points. The maximum overall score, as laid down in the **Annex 1 'Questionnaire'**, is 1.000 points.

Selected companies will have to score at least 50% for each award criterion. Offers for which the technical quality assessment score is less than 600 points or offers for which less than half the points are scored on an individual criterion will not be considered for the price assessment and for the award of the contract.

The offer found to be of the best quality will receive a normalised quality indicator of 100 points. The remaining offers will receive lower normalised quality indicators in proportion to their quality.

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The technical offer must cover all aspects and tasks required by the Tendering Specifications and provide all the information needed to comply with the award criteria.

Offers deviating from the requirements or not covering all requirements may be excluded on the basis of non-conformity with the **Tendering Specifications** and may therefore not be evaluated.

5.4.2. Financial evaluation

Please refer to Sections 9.3.2 and 6.3.6 of Annex 4 'Guidebook for Tenderers'.

The financial evaluation will be performed on the basis of the prices stated in the Annex 3 'Price table' (which constitutes the financial offer) and Section 6 of Annex 1 'Questionnaire'.

The attention of the tenderer is drawn to the fact that the forecasts about consumption of services do not constitute any formal obligation for the Commission to procure any amount of services.

Prices must be inclusive of all additional costs. Please be aware of **Article 151 of the Rules of Application of the Financial Regulation** on abnormally low price offers.

Any assumption, hypothesis or condition in the formulation of the financial offer shall cause rejection of the whole offer.

The offer found to be the cheapest will receive a normalised price indicator of 100 points. The remaining offers will receive lower normalised price indicators in proportion to their prices.

The prices for the tender must be quoted in Euro.

Tenderers from countries outside the Euro zone have also to quote their prices in Euro. The price quoted cannot be revised in line with exchange rate movements. It is for the tenderer to assume the losses or the benefits deriving from any variation.

5.4.3. Award

Please refer to Annex 4 – Guidebook for Tenderers, section 9.4.

The offer presenting the best value for money will be identified in the following way:

A weighting factor of 70% will be applied to the normalised quality indicator and a weighting factor of 30% will be applied to the normalised price indicator. The highest result will indicate the offer presenting the best value for money:

(Normalised quality \times 70%) + (Normalised Price \times 30%) = Normalised result

The highest normalised result will establish the offer presenting the best value for money.

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6. DATA PROTECTION

By submitting a tender in reply to the present call for tenders, the tenderer (and its subcontractors) commits – should it will be awarded the contract:

- Not to disclose any data or information issued by the EU institutions or Member States administrations and stored or transferred through the contractor's networks during the execution of the current contract, actively or passively, intentionally or negligently, to any authorities, legal or natural persons, with the sole exception of relevant formal requests submitted by EU judicial authorities of any Member of the European Union for the purpose of criminal investigations. If disclosure is imposed by any other authority, the contractor shall consult the contracting authority before providing the requested information.
- To guarantee the confidentiality and personal data protection in line with the European Union Regulation 45/2001³ in the execution of the contract.

7. LIST OF ANNEXES

Annex 1 **Ouestionnaire** Technical Annex Annex 2a Terms of Reference Annex 2b Price table Annex 3 Guidebook for tenderers Annex 4 Declaration of honour on exclusion criteria and selection criteria Annex 5 Legal entity form Annex 6 Financial identification form Annex 7 Power of attorney Annex 8 Model framework contract Annex 9 Baseline Annex 10

³ http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2001:008:0001:0022:en:PDF