

Invitation to participate in the Pre-Qualification stage of a Public Tender for the Supply of Current Research Information System (CRIS) and Request for Information

1. GENERAL

- 1.1. The Israeli Inter University Computation Center (IUCC) (the "**Client**") is a non-profit organization that brings together seven leading universities in Israel - Bar-Ilan University, Ben-Gurion University, University of Haifa, the Hebrew University, the Technion, Tel Aviv University, and the Weizmann Institute.
- 1.2. The Client is interested in acquiring a new Current Research Information System (CRIS) (the "**System**" or "**CRIS**").
- 1.3. For that purpose, the Client intends to issue public tender for the Supply of a Current Research Information System (CRIS) (the "**Project**" and the "**Tender**", respectively).
- 1.4. Prior to issuing the Tender, the Client wishes to conduct a preliminary process of pre-qualification, in accordance with the terms and conditions specified herein, through which it will classify relevant participants for the Tender (the "**Pre-Qualification**" or "**PQ**"). In addition and in parallel to the PQ, the Client issues this request for information ("**RFI**") in order to receive information from such participants on different subjects relating to the System and its abilities.
- 1.5. This process of PQ and RFI will be conducted in accordance with the terms and conditions specified in this invitation, including all appendices and forms attached hereto (the "**Invitation**"), and in accordance with the IUCC Tenders Guidelines - 2010 (the "**IUCC Guidelines**") which corresponds with the Mandatory Tenders Regulations (Engagements of a Higher Education Institute), 2010 and can be found at the IUCC website.
- 1.6. Unless specified otherwise, all capitalized terms shall have the meaning ascribed thereto in this Invitation.

2. PROJECT OVERVIEW

- 2.1. The Client is interested in the supply, customization, installation, integration as well as maintenance, support and future upgrades of a CRIS system. The Proposal should offer a viable solution that was successfully implemented and used (on an institutional level) in a significant number of notable higher education institutions worldwide.
- 2.2. The System should help researchers and universities improve the efficiency and performance of their academic activities, enhance their worldwide research visibility and collaboration, and advance the reliability and transparency of the national funding mechanism.
- 2.3. The main requirements from the System:
 - 2.3.1. Establishing a common basic system for managing publications in each of the participating universities, according to standards of information structure (CERIF) and a common ontology.
 - 2.3.2. Management of academic CV information, including the ability to import information from external databases and from internal institutional information systems, generating reports based on the CV information,

presentation of CV, production of different formats of CV, etc. This function shall be optional and shall be implemented in those institutes that will choose to use it.

- 2.3.3. Once established, each university will have the freedom to acquire and adopt on its own, additional functional modules. Each university has its own different infrastructures and systems, and as part of the works the supplier will be required to establish data import mechanism from the infrastructures and systems currently available in each university.
- 2.3.4. The System shall have the ability to automatically import publications data from external databases (including WoS, Scopus and others) in accordance with standard digital identifiers (e.g. ORCID, DOI) and shall have the power to match it with personal information of faculty from internal institutional systems and with other external databases of metadata on publications, citations, patents, grants, and other research and academic related information sources.
- 2.3.5. The System should support multi-lingual Unicode presentation of content. Most content would be presented in English, but presentation of contents may also be in Hebrew and Arabic and occasionally of other languages. The supplier is required to present an existing solution or develop one for Unicode presentation and bi-directional content editing.
- 2.3.6. The System should enable flexible connectivity for gathering data from a number of organizational internal information systems (including Human-Resources, Grants, Publications, Communications, Teaching, Student Administration, Library, etc.) of different types and structures in each institution. The supplier will establish the integration and train university IT specialists for handling modifications and troubleshooting.
- 2.3.7. A major consideration is openness and commitment of the Supplier for future development. This includes interoperability with academic networks, open access platforms, institutional repository vehicles, bibliometric benchmark systems and other future development directions in the academic arena.
- 2.4. The System should address the main functions with respect to the following main types of users:
 - 2.4.1. Funding agency - the System should enable improvement of the current national academic budgeting model. The System shall enable the Planning & Budgeting Committee ("PBC") of the Council for Higher Education ("CHE") to receive the relevant data directly from the institutions and audit its quality.
 - 2.4.2. Academic institutions – the System should provide comprehensive and up-to-date information, and retrieval of information and reports on research efforts and outcomes relevant for monitoring, prioritizing, support and funding of institutional academic units and for marketing purposes.
 - 2.4.3. Researchers – the System should simplify, streamline and improve management of personal information, including keeping an updated CV, defining CV templates for different purposes (like promotion and applying

for grants), and displaying the CV in the personal website. Friendly and intuitive interface is essential.

- 2.4.4. Society - The System will enable listing and searching of all scholarly documents produced by the university faculty, not only in English, but also in Hebrew and Arabic and occasionally in other languages. The System will provide the infrastructure for creating a national database of research output metadata and, in due time, of full documents, accessible to the institutions, the CHE and the public.
- 2.5. The implementation and set up of the System will be made individually in each of the participating universities (unless the Client will decide to implement the alternative of ONE national system that will serve all universities), considering each university's information systems, current tools of research management.

The above is a brief general overview of the Project and the System provided for the convenience of the Participants. A detailed description of the Project and any works included therein will be specified in the Tender documents and the contract that will be attached thereto. It is clarified, that the Client shall not be bound by the terms of the Project and the Tender process specified in this document, and that the scope and terms of the Project may be amended and/or redefined by the Client during or following this process.

3. **SCHEDULE**

- 3.1. Without in any way limiting the right of the Client to change or postpone any of the following dates, the expected schedule for the PQ and RFI process is as follows:

Issuance of this Invitation	-	October 13, 2017
Last date for submission of Clarification Requests	-	December 4, 2017
Submission Date	-	January 22, 2018

- 3.2. The Client shall be entitled, at any time, to change and/or postpone any of the abovementioned dates. Notification of such changes shall be delivered as Addenda to all Participants pursuant to the provisions of Section 8 below. In any event of such extension, the rights and obligations of the Client and of the Participants previously subject to such deadlines shall be extended accordingly.
- 3.3. For the removal of doubt it is clarified, that nothing herein shall be construed as granting an extension of any kind. Without derogating from the generality of the foregoing, the Submission Date (as defined below) may be postponed by such number of days as shall be necessary, in the opinion of the Client, including, *inter alia*, in order to enable the Participants to revise their Submissions as a result of any Addendum issued.
- 3.4. Any change and/or extension as aforementioned shall not derogate from any of the Client's rights according to the Invitation and any applicable law, and the Participants hereby irrevocably waives and shall be prevented from raising any claim and/or demand in this regard.

4. **REQUEST FOR INFORMATION**

- 4.1. The Client issues the RFI in order to solicit information relevant to the Project from the Participants with experience and expertise in similar projects.
- 4.2. The RFI is intended to examine the applicability of the Project in the manner envisioned by the Client and to seek responses from Participants (as defined below) that are willing and capable to execute the Project, in the manner described herein.
- 4.3. The Participant's response to this RFI shall be submitted together with the PQ Submission Form, and should contain any relevant information with respect to the Project, as described in section 1 above.
- 4.4. **The Required Information** - the Client requests information regarding execution of a CRIS project, and detailed response particularly regarding the issues and inquiries detailed in **Appendix B**.
- 4.5. This RFI is a preliminary process taken by the Client, solely for the purpose of receiving information and is not a condition for participation in the PQ. The Client may, but is not obligated to, use any or all of the information it receives during the course of this RFI for the purpose of executing any further proceedings (if any), including the issuance of the Tender, all in accordance with the provisions of the law and subject to the discretion of the Client.
- 4.6. The Client shall not be under any obligation, with respect to any of the Participants, by virtue of this RFI.
- 4.7. Without derogating from the above, participation in this RFI does not provide an advantage to any Participant, nor shall it deem to grant any Participant with any rights towards the Client. The Client reserves the right not to proceed with the Project, to engage in a contract with any third party that is not a Participant in this RFI and/or to perform any other or additional process, all at its sole and exclusive discretion.
- 4.8. The Client reserves the right to request additional information (in writing or otherwise) as it deems necessary, to visit sites where a Participant's system is operating, to perform professional inquiries regarding any Participant including by way of contacting third parties and to invite any of the Participants to meet with representatives of the Clients.

5. **INVITATION FOR PRE-QUALIFICATION**

5.1. **Invitation for PQ**

- 5.1.1. The preliminary process of PQ will be the first stage of a two-stage selection process to select the entity which will perform the Project.
- 5.1.2. The Client invites the Participants that meet the PQ Requirements detailed herein (the "**Participants**") to participate in the PQ process, by submitting all documents and forms that are necessary in order to demonstrate their compliance with all the requirements of this Invitation, including all Threshold Requirements (collectively the "**PQ Requirements**").
- 5.1.3. The purpose of the PQ process is to identify eligible participants, who comply with all PQ Requirements, and who will be invited by the Client to participate in the subsequent competitive Tender process, and submit their

bids for the execution of the Project. The number of Participants to be announced as Eligible Participants is not limited.

- 5.1.4. It is hereby clarified that the printed version of the Invitation documents that was deposited in the Tender Box shall be the sole binding copy in respect of this PQ and RFI process (the "**Binding Copy**"). In this respect, it is emphasized that any other copy of the Invitation documents, including, without limitation, a copy which was printed by the Participant from the Website and/or any document submitted by any Participant through any digital media, or which was edited by the Participant and submitted to the Client, shall not replace the Binding Copy and shall not prevail over the Binding Copy.

5.2. **The Tender Process**

- 5.2.1. Following this RFI and PQ process, the Client will issue a request for proposals for the Tender ("the "**RFP**") and will select, from the bids that will be submitted by the Eligible Participants, one winning bid as the awarded bidder of the Tender (the "**Awarded Bidder**").
- 5.2.2. The RFP and any other documents issued with respect to the Tender, including a contract for the performance of the Project (the "**Tender Documents**"), will be delivered only to those Eligible Participants who were prequalified.
- 5.2.3. The terms and conditions of the Tender Process, the selection criteria and any additional requirements, including mandatory technical requirements, applying to the Eligible Participants that will submit their bids to the Tender, will be specified in the RFP and the Tender Documents.
- 5.2.4. Unless specified otherwise in the RFP, the bids to the Tender will be evaluated based on the compliance of the bids submitted by the bidders with all mandatory requirements (which will be evaluated on a "go/no-go" basis) and on the bidders' technical proposal and a price proposal, according to the terms and conditions as shall be specified in the Tender Documents.

5.3. **PQ Threshold Requirements**

Only Participant who fully meets all the threshold requirements stipulated in this Section 5.3 (PQ Threshold Requirements) (the "**Threshold Requirements**") may be considered as Eligible Participant:

- 5.3.1. A Participant, who supplied and installed at least thirty (30) CRIS Systems (in this section: the "**Systems**") that were operational during the two (2) years prior to the Submission Date in universities and/or institutions of higher education, who use the System as their main research management system.
- 5.3.2. Each of the Systems specified in section 5.3.1 above:
 - 5.3.2.1. Installed in institutions that:
 - 5.3.2.1.1. Are ranked among the top 700 in either Shanghai 2017, Times Higher Education 2017 or QS 2017 rankings;

5.3.2.1.2. Have at least 200 full time research academic staff.

5.3.2.2. Is working in accordance with standardized metadata and complies with the Common European Research Information Format (CERIF);

5.3.2.3. Is able to automatically import data from internal institutional information systems including, but not limited to Human-Resources, student administration, Grants, Publications, Communications, Teaching, and Library.

5.3.2.4. Automatically imports information (including for example: title, authors names and affiliation, journal title, volume, issue, pages, date and DOI and whenever possible citation statistics and metrics) at least from the two major external databases of publications meta-data – Scopus and Web of Science; Each record should specify all the relevant attributes.

5.4. **Eligibility for Participation in the PQ Process**

5.4.1. In order to participate in this PQ process, a Participant must possess the relevant qualifications and comply with the Threshold Requirements that are specified in section 5.45.3 above.

5.4.2. It is hereby emphasized that the Threshold Requirements and any other requirements stipulated in the Invitation documents must exist in the Participant itself, unless explicitly specified otherwise.

5.4.3. Each Participant may submit only one PQ Submission Form.

5.4.4. The submission of one PQ Submission Form by multiple entities (i.e. two or more entities who join together to submit one application) shall not be allowed, and any joint submission shall be disqualified.

5.4.5. Notwithstanding the above, it is clarified that for the purpose of demonstrating compliance with the Threshold Requirement, a Participant shall be entitled to rely on experience acquired by a legal entity, whose business operation was purchased by said Participant, by way of merger and/or other transaction for the transfer of assets and/or business activity.

6. **REVIEW OF THE INVITATION DOCUMENTS**

6.1. Any person and/or legal entity requesting to participate in the RFI and PQ process shall be entitled to review the Invitation documents:

6.1.1. At the offices of the Client at Tel-Aviv University Campus, Software Engineering Building, Tel-Aviv (the "**Client's Offices**"), Sunday through Thursday between 9:00 to 17:00.

6.1.2. On the Client's website: <http://il.iucc.ac.il/he/michrazim/open> (the "**Website**").

6.2. A printed copy of the Invitation documents can be obtained through the Website.

6.3. Any Addenda (as defined in Section 8 hereunder) issued by the Client shall constitute an integral part of the Invitation documents, and can be reviewed by any person at the Client's Offices and/or on the Website, as specified above.

- 6.4. The Client shall not be responsible and shall carry no liability for any damage and/or loss and/or expense, incurred by a Participant and/or to anyone on its behalf, due to any fault and/or error and/or lack of availability of the Website, and the Participant hereby irrevocably waives and shall be prevented from raising any claim and/or demand in this respect.

7. **CLARIFICATIONS OF THE INVITATION DOCUMENTS**

- 7.1. Participant are responsible for examining the Invitation documents with appropriate care and for being informed with any and all conditions which may in any way affect their participation in the PQ process and the subsequent Tender.
- 7.2. Participants requiring clarifications of the Invitation documents may raise questions, queries and requests for information and/or clarifications, by no later than **December 4, 2017** (respectively the “**Clarification Request**” and the “**Last Date for Clarification Request**”). **A Clarification Request submitted at a later date may either be regarded or disregarded, at the sole discretion of the Client.**
- 7.3. Any Clarification Request shall be submitted in writing and addressed to the undersigned to E-mail address sigal@mail.iucc.ac.il. The Participants shall specify in the Clarification Request the relevant section to which their question or clarification relates.
- 7.4. The Client has no obligation to amend the PQ Documents further to such Clarification Request. All replies issued by the Client to the Clarification Request shall constitute an Addendum, as defined in section 8 below.
- 7.5. It is the Participant’s sole responsibility to ascertain which Addenda were issued prior to the Submission Date, to consider their content and be familiar with their terms and the Participant hereby irrevocably waives and shall be prevented from raising any claim and/or demand in this respect. The Participants shall print each Addendum and attach it to their PQ Submission Form.
- 7.6. The Client shall not be bound by, and Participants shall not rely on any oral interpretation or clarification to the Invitation documents.
- 7.7. Without derogating from any of the Client’s rights, the Client may request from any of the Participants to clarify, supplement, and/or amend any item contained in its PQ Submission Form and/or to delete, disregard, withdraw or correct any reservations therein and/or to submit any additional information, details and explanations, which the Client considers necessary for the evaluation of its PQ Submission Form.
- 7.8. Participants shall comply with any request for clarification issued by the Client and shall submit all clarifications and additional information requested therein, within the time period stipulated in such request. Participant's response to the requests issued by the Client, shall be attached to the PQ Submission Form of such Participant, shall form an integral part thereof, and shall replace and/or take precedence over corresponding items in the PQ Submission Form that are lacking or contradictory to the said response. The Client may issue request for clarification regarding the RFI by e-mailing the Participant.

8. **AMENDMENTS AND ADDENDA**

- 8.1. At any time prior to the Submission Date, the Client may, for any reason, amend and/or modify the PQ Documents by issuing an addendum (herein an "**Addendum**"). Any Addendum will be published on the Website and delivered to all the Participants who paid the Participation Fee, through the means the Client shall deem fit. Participants shall be required to acknowledge receipt of any such Addendum.
- 8.2. Any modification of PQ Documents, which may become necessary as a result of a Clarification Request, shall be made by the Client exclusively through issuance of an Amendment pursuant to this section.
- 8.3. Only Addenda that were issued by the Client, whether on the Client's initiative or as a response to Clarification Request, in accordance with the provisions of this Section 8 above, shall bind the Client. The Client shall not be held liable for, or bound by any replies, information or instructions not issued pursuant hereto.
- 8.4. For the avoidance of doubt it is clarified, that any modification, amendment, reservation, clarification, revision, addendum, elimination or other change of any of the provisions of the Invitation documents or any part thereof, made by a Participant in any manner whatsoever, may cause disqualification of such Participant's PQ Submission Form, all in accordance with the Client's sole and absolute discretion.
- 8.5. As part of its PQ Response, the Participant shall be required to present, among other things, contact details of clients which can attest to the Participant's experience and provide further details regarding the Systems that were supplied by the Participant. The Client reserves the right to approach the Participant's clients in order to obtain additional information, including regarding the manner in which the Participant's System complies with the Threshold Requirements.

9. **METHOD OF SUBMISSION - INSTRUCTIONS TO PARTICIPANTS**

The Participants response to the RFI and the PQ shall be submitted in accordance with the following provisions:

- 9.1. Participants shall prepare their PQ submissions (the "**PQ Response**") in strict conformity with the requirements of this Invitation and shall answer all parts of the PQ Submission form attached hereto as **Appendix A** (the "**PQ Submission Form**"), in an accurate and detailed manner, disclosing all the information requested, as well as any additional information or data required to clarify, substantiate and, in general, support their PQ.
- 9.2. The PQ Submission Form must be submitted in 2 printed copies of which one will be clearly marked as an original.
- 9.3. Together with the PQ Submission Form, the Participants who wish to respond to the RFI shall submit their answers to the questions detailed in Appendix B, as specified in section 4 above and shall attach all other required information and documents as their response to the RFI (the "**RFI Response**").
- 9.4. Participants shall not modify or supplement the instructions of this Invitation. Unauthorized conditions, limitations, modifications, supplements, reservations, disclaimers or provisions attached to a PQ Response may cause the PQ Response to be deemed non-compliant with this Invitation.

- 9.5. The Participant's RFI Response and PQ Response, including any supplementary materials and printed literature, as well as any request for clarification shall be submitted in English only.
- 9.6. The Participant's RFI Response and PQ Response shall be duly signed by the Participant's authorized signatory, accompanied by Participant's corporate seal.
- 9.7. **The Client shall not allow the submission of a partial PQ Response and may disqualify any PQ Response that shall be partial or incomplete.**
- 9.8. Each Participant shall provide the Client with its updated contact details, including its full name, identification number, address, phone number, facsimile number and e-mail address. The Client shall not be responsible for any damage and/or loss and/or expense incurred by a Participant and/or to anyone on its behalf, due to any fault and/or error with respect to the details provided by the Participant, and the Participant irrevocably waives and shall be prevented from raising any claim and/or demand in this respect.
- 9.9. Each Participant shall submit its RFI Response and PQ Response in a sealed envelope marked "**RFI and Pre-Qualification for Participation in a Public Tender for the Supply of Current Research Information System**" containing all of the following:
 - 9.9.1. The PQ Submission Form, including any and all documents and attachments as stipulated in the PQ Form that are required to demonstrate compliance with the Threshold Requirements;
 - 9.9.2. The Participant's response to the RFI, including all supporting documents;
 - 9.9.3. This Invitation and any Addenda issued by the Client (all initialed by the duly authorized signatory of the Participant or stamped by Participant's seal in each page);

9.10. **Submission Date**

The Participant's RFI Response and the PQ Response, including all documents specified in section 9.8 above may be submitted to the Client and delivered to the designated tenders box located at Tel-Aviv University Campus, Software Engineering Building - 4th Floor, Tel-Aviv 6997801, Israel , (the "**Tender Box**"), during business hours (Sunday through Thursday between the hours: 9:00-17:00) and no later than **January 22, 2018** at **16:00** (the "**Submission Date**").

The Client may, at its sole discretion, extend the Submission Date by issuing an Addendum in accordance with the provisions of Section 8 and by posting the new Submission Date on the Website.

The Client will leave unopened any and all submissions received after the Submission Date. All unopened submissions will be promptly returned to the relevant Participant.

9.11. **Validity of the PQ Response**

The PQ Response shall be valid until **May 22, 2018**.

For the removal of any doubt, a Participant announced as an Eligible Participant is required, in order to continue its participation in the Tender Process, to extend the

validity of its PQ Response, until the submission date that will be set in the Tender Documents.

The Client shall be entitled, from time to time, and at its sole discretion, to extend the validity of the Participant's PQ Response for additional period, by submitting a written notice to the Participant.

9.12. **Confidential Information**

Without derogating from the generality of the provisions of section 34(v) of the IUCC Guidelines (and the discretion granted thereunder to the Client), Participants are required to detail, within the PQ Statement Form and the RFI Response, in a clear, complete and legible manner, all information contained in their PQ Response and RFI Response, which they consider to be confidential. Participants which detail certain information as confidential will not be permitted to review the same type information contained in the responses of other Participants. Subject to the applicable law, the Client shall have sole discretion whether to accept or reject any such Participant's confidentiality request.

10. **EVALUATION OF THE PQ RESPONSE**

10.1. The Client shall examine the PQ Response in order to determine whether the Participants meet the PQ Requirements.

The PQ Response will be evaluated on a "go/no-go" basis, and will not be graded.

10.2. As part of the PQ process and without derogating from any other prerogative of Client pursuant to the Invitation, the Client may, at its sole discretion, conduct an independent inquiry or investigation regarding any matter in connection with the PQ Response. As part of such inquiry, the Client may, inter alia, request further information and clarifications from any Participant or any person or entity the Client may deem appropriate;

10.3. Without derogating from the rights of the Client pursuant to this Invitation and any applicable law, the Client will be entitled to disqualify any PQ Response in the event that the Client is of the opinion that such PQ Response or any part thereof does not conform to the PQ Requirements.

11. **ANNOUNCEMENT OF ELIGIBLE PARTICIPANTS**

11.1. Upon completion of its evaluation of the PQ Response, the Client will announce those Participants which the Client deemed to have successfully complied with all PQ Requirements ("**Eligible Participants**").

11.2. Participant who will be deemed by the Client to have failed to meet any one of the Threshold Requirements or failed to comply with any of the other PQ requirements will not be announced as Eligible Participant.

11.3. The announcement of a Participant as an Eligible Participant and any notice related to disqualification and/or failure of a Participant to comply with any of the requirements of the PQ, shall be delivered to the Participants exclusively by the secretary of the Tender Committee (the "**Secretary**"). Any announcement and/or declaration submitted to Participants in the matter mentioned above, whether orally or in writing, by anyone other than the Secretary, shall be deemed invalid, and the Participant shall not rely thereon in any manner and for any purpose or

use. Participant relying on such announcement and/or declaration shall do so at its own risks.

11.4. Without derogating from the generality of the provisions of Section 14 (Reservation of Rights) below, following the issuance of the Tender Documents, the Eligible Participants will be invited to submit a bid in accordance with the provisions of the Tender Documents.

12. **RIGHT OF REVIEW**

12.1. Following the announcement by the Tender Committee of the Eligible Participants, a Participant that was not announced as Eligible Participant, shall be entitled to review the Eligible Participants' PQ Response and the resolutions of the Tenders Committee.

12.2. At the end of the Tender Process (if conducted), the RFI Response of such Participant who was announced as the Awarded Bidder in the Tender will be made available for review by such Participants who participated in the Tender Process.

12.3. The above reviews will be in accordance with Section 34(vi) of the IUCC Guidelines, subject to payment of NIS 1000 including V.A.T to the Client and after prior coordination with the Secretary of the Tenders Committee.

12.4. The Client shall have sole discretion with respect to the withholding of any confidential information from the above specified review.

13. **COSTS AND EXPENSES**

Unless otherwise explicitly provided in the Invitation, the Participants shall not be entitled to any payment for the information provided by them in this process, any and all costs and expenses incurred by the Participants in connection with its participation in the RFI and PQ process will be borne by such Participants. For the avoidance of doubt it is hereby clarified that the Participants shall not be entitled to claim any compensation or indemnification from the Client and/or anyone on its behalf with respect to any damage, loss, cost or expense incurred by a Participant as a result of an act or an omission of the Client in relation to the Tender and/or the RFI and PQ process, including any postponement, delay or cancellation of such process in its entirety.

14. **RESERVATION OF RIGHTS**

14.1. All Participants acknowledge that the Project description as specified in this Invitation is general and indicative only, and that the issuance of this Invitation is not intended to give rise to or create any representation, undertaking or warranty of the Client or anyone on its behalf with respect to the Project.

14.2. Furthermore, the Client reserves the right to redefine the Project and its scope and terms, and the terms and conditions for the selection of the Awarded Bidder in the Tender Process (including additional PQ or minimum requirements), as it shall deem appropriate.

14.3. Participation in this RFI and PQ process does not confer upon a Participant or an Eligible Participant any right with respect to the award of the Tender and/or the Project.

14.4. The issuance of this Invitation is not intended to guarantee the issuance of the Tender and/or the execution or the implementation of the Project or any part

thereof. Without derogating from the generality of the foregoing, the Client reserves the right not to proceed with the Tender Process for the Project or any part thereof, and may terminate or cancel any procedures which are conducted with respect thereto.

- 14.5. In the event that the PQ process and/or the Tender was cancelled, the Eligible Participants shall not be entitled to any additional refund or compensation of any sort. Each of the Eligible Participants hereby waives and shall be prevented from raising any claim and/or demand with respect to any additional relief, remedy, compensation or indemnification related thereto.
- 14.6. The Client reserves the right to issue a new invitation for PQ or any other process with respect to the Project, which may include other or additional Threshold Requirements or minimum requirements, and may or may not invite the Participants to take part in such process; to proceed with a different project, or execute the Project in other way deemed appropriate, including alternatives not based on a tender.
- 14.7. Should any reservation, irregularity, error, modification or fault ("**Reservation**") appear in the Participant's PQ Response, for any reason whatsoever (including if due to willful or negligent act of the Participant), the Client shall be entitled, at its sole discretion, to take any or all of the following action: (i) to disqualify the PQ Response; (ii) to request from the Participant clarifications with regard to such Reservation and then accept or reject it, at its sole discretion; (iii) to disregard such Reservation in the evaluation of the Proposal and evaluate the PQ Response without taking the Reservation into account;
- 14.8. Without derogating from the rights of the Client under the Invitation and under any applicable law, the Client will be entitled to disqualify any Participant, or impose any condition or instruction on its participation in the PQ process or the subsequent Tender Process, in the event that the circumstances are such that the Participant no longer complies with any of the PQ Requirements and/or in any the following events:
 - 14.8.1. The commencement of bankruptcy, receivership, liquidation or reorganization proceedings against a Participant, or any similar situation, as determined by the Client, unless such proceedings are discharged within a reasonable period of time, as determined by the Client, or if an interim or permanent receiver or liquidator is appointed over a Participant, or if a Participant has become insolvent;
 - 14.8.2. The commencement of any voluntary action for the liquidation of the Participant, except for the purposes of merger or restructuring on terms approved by the Client in writing;
 - 14.8.3. Any material breach of the provisions of the Invitation including but not limited to the submission of any false or misleading information to the Client;
 - 14.8.4. The Participant shall be required to notify the Client of any of the events described in this Section 14.8, within a reasonable period of time, under the circumstances. The Client may base its decision under this Section 14.8 on the information provided by the Participant as well as on any other information available to it, and may request the Participant to provide it with additional information, as the Client deems necessary.

15. **INTELLECTUAL PROPERTY**

Any intellectual property contained in the Invitation documents is and shall remain the property of the Client, and is entrusted with the Participants for the sole purpose of the participation in the RFI and PQ process.

16. **GOVERNING LAW**

This Invitation, the RFI and PQ process and the Tender shall be governed and construed in accordance with the laws of the State of Israel.

The courts of Tel Aviv-Jaffa, Israel shall have exclusive jurisdiction in any and all disputes arising out of or relating to this Invitation, the RFI and PQ process and/or the Tender.

Dr. Sigal Lahav Scher
Acting Director General,
IUCC

Appendix A

PQ Submission Form

To:

Israeli Inter University Computation Center (IUCC)

Re: Invitation to Participate in the Pre-Qualification stage of a Public Tender for the Supply of Current Research Information System (CRIS) and Request for Information

In response to the Invitation to participate in the Pre-Qualification stage of a Public Tender for the Supply of Current Research Information System (CRIS) and Request for Information issued on _____, (the "**Invitation**"), we, the undersigned, _____ (*name of Participant to be completed*) after having thoroughly and carefully read the Invitation, are pleased to submit our PQ Submission.

Participants who wish to respond to the RFI shall submit their detailed response together with this Submission Form.

1. We agree to all of the provisions in the Invitation and submit our PQ Submission in accordance with the terms and provisions contained therein.
2. We warrant that the PQ Submission is accurate, complete and up-to-date at time of the Submission Date, in accordance with the requirements of the Invitation. The PQ Submission is genuine and not collusive or sham.
3. We acknowledge and accept the provisions of Section 14 (Reservation of Rights) of the Invitation, and without derogating from the generality of the foregoing, understand that the submission of our PQ Submission shall not be deemed in any way to create an obligation on the part of the Tenders Committee to announce our compliance with the PQ Requirements and/or to declare us Eligible Participants; that the Tenders Committee has the right to reject, as it deems appropriate, the PQ Submission submitted by the Participant; and that the Tenders Committee has the right, as it deems appropriate, to annul the PQ Process and to reject all PQ Submissions at any time, all, in accordance with the provisions of the Invitation.
4. The Participant shall be bound by its PQ Submission, which shall be valid for period as specified in the Invitation.
5. There are no actions or proceedings pending nor, to the best knowledge of the Participant and after due investigation, any actions or proceedings which might result in any material or adverse change in the Participant's business, operations, affairs, condition, assets, prospects, cash flow or any of its properties or assets;
6. We have not, directly or indirectly, induced or solicited any other Participant to put in a false or sham PQ Submission, and have not by ourselves, or directly or indirectly, colluded, arranged or agreed with any Participant to secure any advantage against any other participant, or to secure any advantage against the Client of anyone interested in the Project;

7. Details of the Participant:

Name: _____
Business Address: _____
Phone: _____
Facsimile: _____
E-mail: _____

Registration Number: _____
Country of Incorporation: _____

Authorized Signatories: _____

8. Compliance with Threshold Requirements

8.1. The Participant, has supplied and installed at least thirty (30) CRIS Systems (in this section: the "**Systems**") that were operational during the two (2) years prior to the Submission Date in universities and/or institutions of higher education, who use the System as their main research management system.

8.2. Each of the Systems specified in section 8.1 above:

8.2.1. Installed in institutions that:

8.2.1.1. Are ranked among the top 700 in either Shanghai 2017, Times Higher Education 2017 or QS 2017 rankings;

8.2.1.2. Have at least 200 full time research academic staff.

8.2.2. Is working in accordance with standardized metadata and complies with the Common European Research Information Format (CERIF);

8.2.3. Is able to automatically import data from internal institutional information systems including, but not limited to Human-Resources, student administration, Grants, Publications, Communications, Teaching, and Library.

8.2.4. Automatically imports information (including for example: title, authors names and affiliation, journal title, volume, issue, pages, date and DOI and whenever possible citation statistics and metrics) at least from the two major external databases of publications meta-data – Scopus and Web of Science; each record should specify all the relevant attributes.

Data and information necessary to demonstrate compliance with the above Threshold Requirement (*Number of columns is for illustration purposes only*):

	1	2	3
Customer Details (<i>Name of customer, contact person telephone No. and e-mail address</i>)			
Description of the System			
The System was operational during the 2 years prior to the Submission Date (<i>Y/N, please detail when the System became operational and whether it is operational at the Submission Date</i>)			
Institution is ranked among the top 700 in either Shanghai 2017, Times Higher Education 2017 or QS 2017 rankings (<i>Y/N, please detail</i>)			
Institution has at least 200 full time research academic staff (<i>Y/N, please specify number of full time research academic staff</i>)			
The System is working in accordance with standardized metadata and complies with the Common European Research Information Format (CERIF) (<i>Y/N, please detail</i>)			
The System is able to automatically import data from internal institutional information systems including, but not limited to Human-Resources, student administration, Grants, Publications, Communications, Teaching, and Library (<i>Y/N, please elaborate regarding the ability of the System to automatically import data and from which internal institutional systems it imports the information</i>)			
The System automatically imports information (including for example: title, authors names and affiliation, journal title, volume, issue, pages, date and DOI and whenever possible citation statistics and metrics) at least from the two major external databases of publications meta-data – Scopus and Web of Science; each record should specify all the relevant attributes (<i>Y/N, please elaborate regarding the ability of the System to automatically import data from the two major external databases of publications meta-data – Scopus and Web of Science, and specify the type and features of the information that is imported</i>)			

**** Participant shall submit all relevant data and technical information regarding the system that is required in order to demonstrate compliance with the Threshold Requirement.**

9. Detailed herein is information contained in the PQ Submission and in the response to the RFI which is considered commercially sensitive or of a secret nature which the Participant considers to be confidential *[to be completed in accordance with the provisions of Section 9.12 of the Invitation]*:

Names and details of customers will remain confidential, however any other details and information required for demonstrating compliance with Threshold Requirements shall not be considered as confidential and will not be excluded from the other Participants' review.

10. We acknowledge and agree that the Client, at its sole and absolute discretion, shall have the sole and independent discretion whether or not to accept said confidentiality request and we shall have no claim, demand and/or right regarding to or arising out of the aforesaid.

Name of Participant	Signature(s) and Corporate Seal	Date
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Appendix B

RFI Response

The Client invites Participants to provide information regarding execution of a CRIS project, and to submit a detailed response to the RFI, particularly regarding the following issues:

1. Please describe the Participant's expertise, the relevance of such expertise to the Project and the experience in implementing similar large-scale projects.
2. Please share your views regarding the concept and structure of the Project, the expected timeframe and proposed operational methodology.
3. Please provide a description and an overall cost estimation of the licensing model, the implementation and integration stages of the Project and the service and support costs based on your proposed maintenance model.
4. Please share your experience and recommendations for setting up CRIS systems that serve several universities and the national regulator, that operate on institutional and national levels at the same time.
5. Please share your views if and how it would be possible to install ONE CRIS that will serve all participating universities, while securing compartmentalization, local operation, extensions and permissions on the institutional level.
6. As described, the multi-lingual nature (mainly English but also Hebrew, Arabic and more) of the Israeli academic activity should be addressed:
 - 6.1. Please provide your recommendations for implementing support of Unicode presentation and bi-directional content display and editing.
 - 6.2. Please provide your recommendations for the possibility of using an Israeli database as a source for meta-data of Hebrew scientific publications (for example, what technical requirements such database should have).
7. The ability to export the internal CRIS database to standard formats (e.g.: XLXS, SQL, XML) for local processing.
8. Detail the modules required for monitoring publications, modules for managing and for presentation of CVs (optional for the Client) and other modules included in the System. Please include pricing of each relevant module for the first year, including license, customization, installation and integration, and for any additional year (upgrades and support).
9. List the type of interfaces that the system provides (Web services, API) and whether the system allows operation of the Client's API. If the System provides user interface for inquiries and any interfaces for the researcher's work. In particular, please refer to the import mechanism of organizational data: is it pulled by the CRIS system or pushed by the institution.
10. Interfaces to leading ERP systems, including SAP and Oracle; the ability of the System to import data directly from such systems or via an ESB (enterprise service bus) system.
11. The ability to monitor the source and the quality of data transferred into the System.
12. The ability to support organizational authentication sign in methods; ability to extend the data structure by adding fields; the ability to define and relate to the organizational structure; ability to define types of users including their roles and permissions; ability to

define and produce current reports; ability to provide or integrate with various research portals with personal profile;

13. The needed preparations by each institute before, during and after system implementation;
14. Please specify on which platform(s) the Supplier is capable of supplying the System: local On-Premises servers / cloud / local Client cloud / hybrid. Please also specify the implications for the Client with respect to each of these alternatives, including in terms of data security, flexibility of each institution to customize the System, licensing model, upgrade and pricing, etc. In particular, please refer to different platforms used by some universities.
15. For a cloud system:
 - 15.1. The means taken to make the system robust and highly available (does it have an active/active or active/passive replica in another location), and the location of the primary data center (and secondary if exists), in order to assess legal issues that may arise.
 - 15.2. The means taken to ensure data is not lost (backups), and the required procedures to restore data should the need arise.
 - 15.3. The means taken to ensure data confidentiality and integrity (aka the information security measures taken).
 - 15.4. Support for EDUGAIN based single sign-on or other integration with SAML2 or alike protocols for federation with the institutes.
 - 15.5. Ability to measure SLA of the service, including web access performance, availability metrics etc., and the ability to provide periodical reports (weekly, monthly) of the said criteria and their deviation from SLA.
 - 15.6. What kind of technology is used by the system APIs (assuming it has APIs), for example SOAP/HTTP, REST/Json and such.
16. For an on-premise system:
 - 16.1. The means taken to make the system robust and highly available, does it have active/active or active/passive support (more than one front-end, more than one backend/middle tier).
 - 16.2. The means taken to ensure data is not lost (backups), and the required procedures to restore data should the need arise, integration with per-institute backup system.
 - 16.3. The means taken to ensure data confidentiality and integrity (aka the information security embedded in the system).
 - 16.4. Support for EDUGAIN based single sign-on or other integration with SAML2 or alike protocols for federation with the institutes.
 - 16.5. Ability to measure SLA of the service, including web access performance, availability metrics etc., and the ability to provide periodical reports (weekly, monthly) of the said criteria and their deviation from SLA.
 - 16.6. Storage requirements.
 - 16.7. Integration with on-premise Active Directory and/or standard LDAP implementations.

- 16.8. What kind of technology is used by the system APIs (assuming it has APIs), for example SOAP/HTTP, REST/Json and such.
- 16.9. Specify what standard protocols they use for connecting to other systems like monetary, HR, student administration.
- 16.10. What kind of system platform is supported (Linux, Windows), what kind of backend databases are supported (MySQL, PostgreSQL, MSSQL, Oracle, other).
- 16.11. What kind of middle tier is used (if at all) - JBoss/Tomcat/other.
17. The Specific System's hardware requirements and the need for any third party software;
18. The need for local/global embedder - please describe how the system was set-up in countries outside local direct reach.
19. Please describe how the System will comply with the Israeli Regulations for Equal Rights of Persons with Disabilities (Adjustments for Access to Service, 5773-2013).
20. Information security and compliance with GDPR (please specify if compliant with ISO-27001).
21. Warranty and maintenance model, including SLA, with reference to local/global support center.
22. Reference to training requirements.

Please include presentations, brochures and any other relevant information.