

SUBJECT: Digital transformation.

Ref.: NDC 1041 on 22 April 2026.

QUESTION & ANSWER REPORT

QUESTIONS 1 & ANSWERS

1	The RFP indicates that an initial implementation of Salesforce already exists to cover some functionalities. Does NDC envision a Greenfield implementation (a fresh Salesforce Org) where existing data is migrated, or a Brownfield approach where we extend the current Org?	We envision a Brownfield approach.
4.1.a	Requirement DM-CDAM-01-03 mentions establishing a centralized Data Lake. Can you confirm that this Data Lake should be built on Salesforce Data Cloud (Data 360)?	The decision will be part of the analysis performed with the awarded integrator. For the bid proposal, please come with your best preliminary suggestion.
4.1.a	Microsoft Entra ID is specified for SSO. Will multi-factor authentication (MFA) be handled entirely by Entra ID, or are there additional NATO-specific hardware tokens or smart card requirements for the Production environment?	MFA will be handled entirely by Entra ID.
4.1.b	Several requirements suggest using RPA (Robotic Process Automation) for badging, financial integration, and HR activities. Are these systems lacking modern APIs, necessitating a UI-based automation approach, or is MuleSoft RPA intended for cross-platform workflow orchestration?	Some of these systems cannot be integrated via API. An RPA approach is intended for these systems.
4.1.b	For requirement DM-AAA-02-01, what specific "criteria" and "skill levels" are tracked? Is this data currently structured in the legacy systems, or must the new solution first establish these data models before the tool can be effective?	Language levels are formally examined according to NATO Standards. Other skills would have to be gleaned by looking at CVs. Language Skills and CVs are already being recorded and stored in Salesforce via a registration platform.

4.2	Could you please clarify the onsite attendance requirements for the Junior Site Administrator & Developer role? Is it a 100% onsite?	Yes, this role should be 100% onsite. We request that the proposed hourly price for the Junior Site Administrator and Developer role assumes 300 hours onsite indicatively. The online Solution Architect's hourly rate should be based on 150 hours indicatively.
4.3	The RFP includes Agentforce for Education. Which Large Language Models (LLMs) are currently approved for use within the NATO security framework?	As part of the project we will need to work to secure accreditation for one of the LLMs if possible.
4.3	Is Salesforce Shield intended for "Encryption at Rest" of all PII data, or is it used primarily for the Event Monitoring and Audit Trail capabilities required for accreditation?	Salesforce Shield is not foreseen in the first work package, but its function should be considered at a later stage, to receive accreditation.
5.2	For the data migration, what is the estimated volume of "Anciens and Alumni" records to be migrated?	Anciens and Alumni already have records in Salesforce. There are approximately 15000 records. The Anciens and Alumni Portal are currently in Moodle with some unstructured data. We foresee that this service would be migrated to an Experience Cloud Site.
5.2	Given the "fragmented and manual" nature of the current state, what level of data cleansing does NDC expect the bidder to perform versus internal NDC data owners?	NDC is already working on some data cleansing, especially for the Lecture Management System, and will continue to support data cleansing where possible. The idea is that the system integrator can support in speeding up this process.
7.1	It's stated that the implementation team shall include at least two technical resources with a valid NATO PSC clearance. What level of PSC clearance is required? e.g. Secret?	NATO Secret.

7.2	Could you please clarify the expected onsite presence requirements for roles other than developers? The RFP specifies that developers are expected to be onsite 30% of the time; however, it is not clear whether similar onsite expectations apply to other project roles.	<table><tr><th>Profile</th><th>Involvement</th></tr><tr><td>Project manager</td><td>100%</td></tr><tr><td>Solution Architect</td><td>100%</td></tr><tr><td>Technical Lead</td><td>100%</td></tr><tr><td>Functional Specialist</td><td>100%</td></tr><tr><td>Compliance and Risk Specialist</td><td>50%</td></tr><tr><td>Migration specialist</td><td>30%</td></tr><tr><td>Change Specialist</td><td>30%</td></tr><tr><td>Test Manager</td><td>30%</td></tr></table>	Profile	Involvement	Project manager	100%	Solution Architect	100%	Technical Lead	100%	Functional Specialist	100%	Compliance and Risk Specialist	50%	Migration specialist	30%	Change Specialist	30%	Test Manager	30%
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7.2	The RFP requires a 30% on-site presence for the development team in Rome. Does NDC provide the necessary secure workstations for developers, or must the bidder provide NATO-compliant hardware for on-site work?	Yes.																		

QUESTION 2

In accordance with the guidance provided in the RfP Standard Bidding And Contract Specifications paragraph 1.7, I would like to request authorization to utilize subcontractors for clearly defined and limited parts of the scope of work. Any such subcontractors would be engaged strictly in line with the conditions of the RfP and under IBM responsibility.

ANSWER

We will accept subcontractors only if the sub-contracted firms are part of the same enterprise group of the bidder.

QUESTION 3

The document “003 ANNEX B RFP.pdf”, Section 7.2, page 43, states the following: “The Project must be executed at the NDC offices in Rome, requiring below profiles to be present on site [...]. A development team shall be available on site at least for 30% of the project”. Given this statement:

Could you please provide further clarification whether the full team (8x staff) must be available on-site a 30% of this requirement is only applicable to certain roles only

ANSWER

The presence of the whole development team is not necessary. We request at least two development team members to be present on-site.

QUESTION 4

With respect to the general bidding procedure for ICB procedures in NATO, it is a requirement for the Bidder to be certified by the Ministry of Defense, specifically in the case of Spain a registration in the Registro de Industria de Defensa (Defence Industry Register). **In case to present a bid jointly with a partner or a collaborator could you please confirm whether is a requirement for both companies to have the same registration status?**

ANSWER

We will accept subcontractors only if the sub-contracted firms are part of the same enterprise group of the bidder. Only the main bidder has to be certified by the Ministry of Defence.

QUESTION 5

The tender documents indicate that questions related to the bidding procedure should be directed to your office. We would like to confirm whether this also covers questions regarding the content and scope of the project itself — such as technical specifications, deliverables, or project requirements — or whether those should be addressed to a different contact and by when (any deadline for sending these questions?).

ANSWER

You may direct all type of questions to our contracting officer Tommaso Cerullo, cc to Luca Stazi. We will forward them to appropriate contact.

QUESTION 6

We would also like to confirm whether questions of this nature will be addressed during the bidders session scheduled for 13 May, and if so, whether questions should be submitted in advance or can be raised on the day. We want to ensure they are submitted through the correct channel and to the appropriate person.

ANSWER

The bidders' conference is intended to clarify doubts and possible gray areas; all questions can be raised at the meeting. However, if you submit the questions beforehand, we would be better prepared to answer them. This will not preclude any additional question during the meeting.

QUESTION 7

Onsite requirement for non-development roles

Can you please confirm **yes or no** whether the 30% onsite presence requirement also applies to **non-development profiles** (e.g. project management, architecture, testing, change)?

ANSWER

No, for non-development profiles the required presence on-site is 100%.

QUESTION 8

Meaning of “involvement”

Is the “involvement” percentage indicated in the table intended to **also represent the onsite presence requirement**, or does it refer only to overall project capacity (onsite + remote)?

ANSWER

The involvement figure is our estimate on how much time the professional profile should be allocated to the project. It does not represent the percentage of on-site presence which is required at 100% for non-development profiles.

QUESTION 9

Distribution of onsite presence over time

If a 30% onsite presence assumption is acceptable, can this be **flexibly distributed over the project lifecycle** (i.e. not necessarily 30% in every phase, but approximately 30% cumulatively by project end)?

ANSWER

This is ok for development profiles.

QUESTION 10

Team-level vs individual requirement

Does the 30% onsite requirement apply to the **overall development team capacity**, or is it expected that **each individual development team member** meets the 30% onsite threshold?

ANSWER

We expect that at least 2 members of the development team meet the requirement.

Our current assumption (subject to confirmation): As per question 1, we require full on-site presence for non-development profiles.

Please see our input in red.

Profile	Project Involvement	Assumed Minimum Onsite Presence	
Project Manager	100%	30%	100%
Solution Architect	100%	30%	100%
Technical Lead	100%	30%	100%
Functional Specialist	100%	30%	100%

Compliance and Risk Specialist	50%	30%	50%
Migration Specialist	30%	30%	30%
Change Specialist	30%	30%	30%
Test Manager	30%	30%	30%

QUESTIONS 11 & ANSWERS

N°	Document	Page	Description of the Question	Response
1	003 ANNEX B-1 ESSENTIAL CRITERIA	1	It's possible to replace the following certificate with equivalent: GWAPT or WAHS for OSCP, CEH and EJPT?	Yes, it is possible for the listed certifications.
2	003 ANNEX B-1 ESSENTIAL CRITERIA	1	In terms of the NS Personal Security Clearance, can you confirm when the technical resources should have the PSC clearance? during the implementation phase?	Essentially the implementation team shall include at least two technical resources with a valid (NS) NATO PSC clearance <u>at the moment of the implementation of the project</u> . However, if the PSC clearance is already available <u>at the time of the offer</u> partner will receive 5 technical scores instead of 1.
3	002 ANNEX A STANDARD BIDDING AND CONTRACT SPECIFICATIONS	1	We are considering the inclusion of a company within our group as a subcontractor. Could you please confirm whether it is necessary to declare this at the current stage? An if so, what's the appropriate procedure for formally declaring them within the tender process?	Please include in your technical documentation a specific declaration highlighting the subcontractor data, what it will specifically do and what kind of certification it has.
4	003 ANNEX B-1 ESSENTIAL CRITERIA	1	Security certifications (CISSP, CompTIA Cloud+, etc.) do not carry any	Yes, they are mandatory.

			scoring points. Are they evaluated on a pass/fail basis?	
5	006 ANNEX E SELF DECLARATION AND ACCEPTANCE OF CONDITIONS	4	When are we required to provide copies of professional certifications? Is this during the implementation phase, or at another stage?	Professional certifications must be included in the technical offer.
6	003 ANNEX B-RFP		Is there an outcome with health check performed recently to the current Salesforce ORG? Any technical debt identified as such?	We have some unresolved issue that will be addressed within the activities foreseen in Lot 1B. More details will be provided at the bidders'conference.
7	003 ANNEX B-RFP		Do we know if Credly, Campaign Monitor, Manage Engine, and the Badging System provide accessible APIs or file-based dataexchange? if so, can the technical specification be shared with bidders?	The badging system is a custom built application we will check with the provider. All the others are commercial applications and publicly state the availability of their APIs.
8	003 ANNEX B-1 ESSENTIAL CRITERIA		The RFP indicates that Work Package 1 starts after contract award, while Work Packages 2 and 3 have flexible start dates defined by NDC. Could you clarify when the required licenses are expected to be activated, as this information is needed to determine license costs?	WP1 is expected to start ASAP in 2026 and we already have the necessary licenses. WP2 should start in 2027 and the required licenses have been identified, we will share a list ASAP. All other licenses will be acquired based on the evaluation performed with the integrator.
9			Regarding Document and Content management, we understand that this capability was already delivered through a dedicated project and therefore will be integrated. What was delivered, on what platform, and what integration points are expected of LOT1A?	The Electronic Data Management System is built on Salesforce. Some modifications of the system might be required and it should be integrated with all the other WP developments.
10	003 ANNEX B-RFP			

11	003 ANNEX B-RFP		What are the primary source systems for data migration? How many records are involved per domain? Shall we assume data needs cleansing or quality wise is in good shape?	A good portion of the data are in Salesforce but, in some cases, a sanitization will be required. Other sources are non-structured data (i.e. Excel worksheets). Data from legacy system except, some MS Access applications, have already been migrated but need revision.
12	003 ANNEX B-RFP		How many dedicated SMEs per capability area, what percentage of their time will be dedicated to this project?	We have two resources dedicated to the project. Other SMEs will be available when required.
13	003 ANNEX B-RFP		Who holds Go/No-Go authority for each work package go-live, and what will be the composition of the Steering Committee?	The project owner is our Executive Coordinator. He reports directly to the Command Group for final decisions.
14	003 ANNEX B-RFP		Can you confirm if ISO 2700, GWAPT certification applies to individuals or company level?	It applies to the individuals.
15	003 ANNEX B-RFP	30	Please confirm if two Solution Architects are required, one for Lot 1A (on-site) and one for Lot 1B (remote)?	They can be the same person but for Lot 1A-related activities he/she should be on site.
16	006 ANNEX E	10	We would appreciate your clarification regarding the documentation required under point d of 006 ANNEX E SELF DECLARATION AND ACCEPTANCE OF CONDITIONS document. Specifically, could you confirm what type of copy/evidence is expected for the three referenced projects?	We require the project' documentation. In case copy of the technical project cannot be provided for some reason, it is requested to present a specific attestation submitted and signed by the NATO entity or its subsidiaries. As for the last possibility, in case the fixed deadline will not permit to present either copy of the project or the specific attestation, copy of the contracts will be accepted. Generic invoices without any indication of the project' contents will be not accepted.

QUESTION 12

"With reference to Lot 2 and to what is specified in the tender documents, in particular the following excerpt: "The license types and quantities listed above are indicative and do not constitute a binding commitment", We kindly ask you to confirm whether a detailed price list is required, specifying the annual cost for each individual module/license.

ANSWER

Yes, a detailed price list is required (please, find attached the revised Annex D).

QUESTION 13

"With reference to Lot 2 and to what is specified in the tender documents, in particular the following excerpt: “The license types and quantities listed above are indicative and do not constitute a binding commitment”, We also kindly ask you to provide the list of licenses (type, quantity, and duration) you intend to activate, and to confirm that the corresponding amount is the one to be included in Annex D.

ANSWER

Please find below the list of the licenses we intend to acquire to support Work Package 1.

SKU / Product	Estimated Future Quantity	Requirement Summary	Duration
Education Cloud — Enterprise Edition	32	Core platform for all staff managing courses, applications, travel & helpdesk	12 Months
Education Cloud Limited Staff Access — Enterprise Edition	45	Read/limited access for faculty advisors & portal-adjacent staff	12 Months
Customer Community Plus for Education Cloud(proposed upgrade over Experience Cloud Login)	2000	Upgraded portal license supporting richer community features for course members, applicants & alumni; replaces login-only model	12 Months
Tableau Cloud Creator (existing — maintain)	5	Maintain existing Tableau Creator licenses for operational reporting & KPI dashboards(RFP LOT 2 baseline)	12 Months
Tableau Cloud Explorer	3	Explorer licenses for intermediate report consumers(RFP LOT 2 baseline)	12 Months
Tableau Cloud Viewer	50	Viewer licenses for read-only dashboard access across NDC staff(RFP LOT 2 baseline)	12 Months
Premier Success Plan — Salesforce Platform — Enterprise Edition	1	24/7 support during go-live & hypercare phases across all WPs	12 Months

Sandbox (Full Copy) — Enterprise Edition	1	Full production replica for UAT, regression testing & safe migration	12 Months
Knowledge — Enterprise Edition	5	Structured knowledge base for helpdesk agents & portal self-service	12 Months
Privacy Center — Enterprise Edition	1	Data retention policies & Right to be Forgotten for GDPR/NATO compliance	12 Months

QUESTION 14

Regarding the experiences to be provided, could you kindly confirm the contracts and related invoices can be considered as attestation?

ANSWER

We require the project' documentation. In case copy of the technical project cannot be provided for some reason, it is requested to present a specific attestation submitted and signed by the NATO entity or its subsidiaries. As for the last possibility, in case the fixed deadline will not permit to present neither copy of the project or the specific attestation, copy of the contracts will be accepted. Generic invoices without any indication of the project' contents will be not accepted.

QUESTION 15 & ANSWERS

1) Considering the financial response template included in Annex D, it appears that for Lot 1 (1A and 1B) a single total amount is required. Could you please confirm that:

- There is no specific request to split this total amount across the 2 sub-lots. **Please find attached the amended Annex D.**
- The hourly rates are not requested. **The hourly rates are requested only for LOT 1B. A lump sum offer is requested for LOT 1A.**

QUESTION 16

DM-SI-01-06 — Integration with the badging system to streamline and automate the badge assignment process (*this could involve RPA functionalities*)

DM-SI-01-09 — Integration with FinS to automate financial activities (*this could involve RPA functionalities*)

DM-SI-01-10 — Integration with APMS to automate HR activities (*this could involve RPA functionalities*)

following clarification questions:

1. Integration capabilities

- Do the badging system, FinS, and APMS offer any integration points beyond UI-level interaction (e.g. screen scraping or UI automation)? For example, do they expose REST/SOAP APIs, webhooks, database connectors, or middleware adapters?

2. Asynchronous data exchange

- 2a. Do these systems support asynchronous data exchange, such as secure file sharing or batch imports?
- 2b. More specifically: do they support structured file exports (e.g. CSV, XML, JSON) via SFTP or shared network drives for batch data exchange with Salesforce?

3. Operations & use cases per system

- What specific operations and use cases need to be handled between Salesforce and each of the following systems?
- APMS
 - What HR events in APMS should trigger an action in Salesforce (e.g. new hire onboarding, contract renewal, departure)?
 - What data needs to flow in which direction — Salesforce → APMS, APMS → Salesforce, or both? What is the expected frequency — real-time, daily batch, or event-triggered?
- FinS
 - What financial events or documents need to flow between FinS and Salesforce (e.g. invoices, payment confirmations, purchase orders)?
 - Does Salesforce need to initiate actions in FinS, or is it primarily reading/receiving data from FinS?
 - What is the expected volume and frequency of financial transactions?
- Badging system
 - What event in Salesforce should trigger a badge assignment (e.g. course completion, arrival check-in, manual approval)?
 - Does the badge system expose a webhook or API endpoint that can receive a trigger from Salesforce?
 - Is badge assignment one-directional (Salesforce → Badge system), or does the badge system need to confirm back to Salesforce?

4. Document & form extraction

- Are there structured form data extractions required from APMS (e.g. for onboarding purposes), or invoice extractions required from FinS? If so, are these documents digital (PDF, Word, web form) or paper-based? If paper-based, are they scanned and stored digitally prior to processing?

5. Hosting & access model

- What are the hosting and access models for APMS, FinS, and the badge system? Specifically:
 - Are they cloud-hosted with publicly accessible endpoints?
 - Are they on-premise behind a firewall?
 - Are they restricted to the NATO network?

ANSWER

At this point in time we are only able to give you a very generic answer: the integration of such services is a requirement but is subject to several variables that will have to be considered and evaluated with the integrator and that are subject to changes. For NATO centralized services (FinS, APMS) the integration is subject to the new infrastructure deployed by NATO (NPCL) and the access that NDC will be granted to its services. APIs for APMS are available but information from the service owner will be required and might not be easy to obtain.

The Badging system is a custom-built application, integration options are available but , also in this case, the situation might change due to the evolving system's security requirements.

The feasibility and the modalities of the integration will need to be assessed in conjunction with the integrator. We recommend to consider these requirements as an analysis and solution effort to be conducted at a late stage of the project when more detailed information will be available.

QUESTION 17

QUESTIONS RELATED TO SPECIFIC CLAUSES OF CHAPTER 8 PENALTIES OF THE ANNEX A STANDARD BIDDING AND CONTRACT SPECIFICATION.

- However, the NDC, according to the specific contract requirements, has the right to include different penalties than the above-mentioned
 - Could NDC please confirm that such penalties may be limited solely to delays in meeting the contractual milestones?

ANSWER

NO! Penalties will apply also in the event of partial or total non-compliance in performing the agreed works/services by the Contractor, whatever there as on other than force majeure or due to NDC request or in the event of circumstances entirely beyond the control of the supplier, duly justified. Additionally, in the event that the Contractor fails to deliver the essential services under the Contract in accordance with the defined and objectively measurable Key Performance Indicators (KPIs) provide by the OPR, the Contracting Authority reserves the right to terminate the Contract.

- The decision on the actual amounts of penalties will be taken following a proposal from the Operational Responsible People (OPR), with specific responsibility for such matters
 - Could NDC please confirm that, in the event of non-compliance identified by NDC, provision is made for Deloitte Consulting Srl SB to remedy such non-compliance, excluding the application of penalties insofar as possible?

ANSWER

YES, according to the OPR indications/decisions.

- The amounts of the penalties are normally deducted from credits due to the firm pursuant to the contract and will be subtracted from the first invoice to be paid without prejudice in respect of reimbursement of any additional expenses that the NDC might incur to compensate for failures or defaults attributable to the firm
 - Could NDC please confirm that penalties chargeable to Deloitte Consulting Srl SB pursuant to the contract may be billed separately?

ANSWER

NO! The penalties will be directly deducted by the due payments.

- The right of the NDC to be compensated for any further damage is in any case unquestioned
 - Could NDC please confirm that, should penalties be applied, NDC could evaluate to waive the additional damages claim, notwithstanding NDC's incontestable right thereto?

ANSWER

NO, the additional damages claim will remain at the sole discretion of the NDC.

QUESTION 18

The RPF does not include an express liability clause, which is inconsistent with the usual limitations of liability as constantly defined by NATO as excluding indirect/consequential damages. Can you please add a new section using the following NATO language in that respect.

ANSWER

A NATO liability clause will be included in the following contract.

QUESTION 19

I am reaching out to kindly ask a question related to the Clause 7 GUARANTEE of the Annex A Standard Bidding and Contract Specification. Clause 7 states: “AT THE TIME THE ORDER IS ACCEPTED A BANK/INSURANCE GUARANTEE COVERING 20% OF THE ORDER VALUE WILL BE SUPPLIED BY THE CONTRACTOR”. Our question: will NDC provide bidders with a template for the bank/insurance guarantee to facilitate preliminary verification with bank/insurance companies?

ANSWER

Unfortunately, we don't have any template to share. However, bank/insurance companies are usually aware of the Insurance Surety for Public Contracts, therefore it only needs to engage with them presenting the NDC request and they will surely help you.

QUESTIONS 20 & ANSWERS

I am reaching out to kindly ask some question related to the Clause 8 PENALTIES of the Annex A Standard Bidding and Contract Specification.

- Will NDC define and share the method that will be adopted to calculate such penalties? **The following contract will include such a method. However, usually they are calculated in a specific percentage (indicated in the contract) of the value of the single PO.**
- Will NDC consider the possibility of negotiating the amount of each penalty? **NO! However, before applying penalties the NDC will start a specific administrative process to get all the necessary inputs by the OPR and the provider.**
- In case of penalties, will NDC issue an accounting statement documenting the penalty? **YES!**

QUESTION 21

We would like to kindly request a short extension of the submission deadline until at least Friday 22nd of May.

ANSWER

It is authorized an extension until Friday 22nd of May at 17.30.

GENERIC CLARIFICATION

1. The bidder must demonstrate at least the Global Strategic or Platinum partnership level with Salesforce.
2. 'Please note that 3 licenses are required for Tableau next creator and 1 license is required for Asset scheduling'.
3. The bidders' conference is a mandatory step before presenting the offer and you will be dialing -in with other vendors. During the conference the bidders will have the opportunity to clarify doubts and gray areas of the bid. No information on the offers shall be disclosed. The offers will be evaluated by a

technical board after the closure of the bid. Should a bidder require a more specific discussion this could be done via email by specifying that the content is confidential or through a request for a face-to-face call.

4. Please find enclosed the revised Annex C. Specifically, be aware that both the emails, which contain the technical and economic offer, must be sent as a password-protected ZIP file. The passwords to access this protected file should be sent separately, the day after the submission deadline, that is on 21 May 2026, by 12:00 PM local time. **Please note that any technical or economic emails submitted so far will not be taken into account.**

Bidders' conference dialing instructions

When connecting, be sure to change your default display name and use the 'join without signing in' option. Please use the assigned 'Firm#' as your display name when you enter the meeting. We will only admit attendees who are using the assigned display name.

Please disable your video camera.

Please also note that the meeting will address general questions and clarifications related to the bidding process and technical specifications, no information on the offers shall be disclosed.