



Rome, 09 June 2026

NDC/1041 bis

SUBJECT: New invitation only for the Lot 2 of the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome - Italy.

Madam/Sir,

According to the NDC operational and administrative needs and for acting transparently and giving all the bidders the same opportunity to amend their offers accordingly, this new invitation integrates the one sent on 22 April 2026 for better explaining the bidding instructions and the award criteria **only for Lot 2** of the project in subject.

Therefore, please be aware that:

- This offer **refers only to the Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy*, **therefore will not affect the Lot 1 at all**.
- This offer **shall at all substitute** any other previous offer presented to the NDC for **Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy*.
- Any other already presented offer for **Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy* **will not be evaluated**.
- On the contrary, **all the offers already received for Lot 1 are still valid and cannot be modified**. As soon as this integrative process related to Lot 2 starts, the technical board will be asked to evaluate the technical proposals for lot 1 and assign the related scores. The economic offers for lot 1 and 2 will be together decrypted and evaluated after the new bid closing date for Lot 2.
- Only offers submitted according to Annex D and under the bid indications/documentations will be accepted. Any other form or condition different than the ones indicated by the NDC will not be considered acceptable.
- Partial offers that include only some of the below indicated mandatory and future licenses will not be evaluated.

- The NDC is obliged to order only its actual requirements and **will award only the mandatory licenses, while reserving the right to activate the future licenses based on its needs and available resources**. The mandatory licenses **will be subscribed starting from 2027**, however the NDC, at its sole discretion, reserves the right to anticipate the subscription of one or more mandatory licenses by the end of 2026.
- **The award licenses prices are to be considered firm and fixed for the entire term of the contract**. However, renegotiations since the third year (2029) onward could be accepted and included in the following contract.
- The following contract **will only be concluded under the STANDARD BIDDING AND CONTRACT SPECIFICATIONS at Annex A** that will exclusively govern the future relationship. Therefore, the NDC will not accept any other Order Form or agreement.

Therefore, you are kindly invited to submit your best quotation for the provision of the required service as per the description provided in the Standard Bidding and Contract Specifications at Annex **A** to this letter and in the RFP at Annex **B**.

In case of discrepancies, the RFP (Annex B) will prevail on the “NDC Standard Bidding and Contract Specifications” (Annex A) or other bidding documentation.

Please, submit quotes as instructed in Annex C of this document.

The new bid closing date for Lot 2 shall be **02 July 2026, 17:30 Local Time**.

The bid opening is not public.

The **Lot 2** contract will be awarded, subject to availability of sufficient funds, by **“Best price approach”** according to the best **“LOT 2 MANDATORY LICENSES GRAN TOTAL”**. On the contrary, Lot 1 will follow up on the previous indication/rules. As soon as this integrative process related to Lot 2 starts, the technical board will be asked to evaluate the technical proposals for lot 1 and assign the related scores. The economic offers for lot 1 and 2 will be together decrypted and evaluated after the new bid closing date for Lot 2.

However, be aware of the following:

- The individual cost per all the licenses (mandatory and future) **must be specified**.
- The sum of the individual cost per all the licenses (mandatory and future) **must match** the “GRAN TOTAL” offers.

- If a bidder offering a “LOT 2 **MANDATORY** LICENSES GRAN TOTAL” is not more competitive than the other bidders’ offers for “LOT 2 **FUTURE** LICENSES GRAN TOTAL”, the bidder who made the best LOT 2 **MANDATORY** LICENSES GRAN TOTAL offer **will be requested to align** the offer for the LOT 2 **FUTURE** LICENSES GRAN TOTAL to the best price.
- If the bidder does not accept such an alignment, **the bid will be awarded the cheapest offer for each “GRAN TOTAL”**.

Before signing the contract, the NDC may revise and integrate the RFP to include any superior technical, functional, or performance features contained in the winning bidder’s proposal, where such integration is considered to be in the best interest of the NDC. A Framework contract will be signed. However, the signature of the contract will not engender a financial liability for the NDC. Upon award, the Contracting Officer will place Purchase Orders (PO) against the Contract, based on the inputs provided by the CIS as Project Manager. The POs shall be issued by each single project on an annual basis subject to availability of funds.

This invitation to bid is in no way binding on the NDC which reserves the right not to award the contract, to award it partially, or to reject any offer which does not comply with the conditions of this invitation to bid, or with any other relevant element as assessed by the NDC, with no legal liability of any sort for the NDC. Its decision will not be open to appeal, and the bidder will not be entitled to any claim or reimbursement. The NDC also reserves the possibility of further negotiating the terms and conditions of the initial offer received with the bidders.

Any question related to the bidding procedure must be referred to the Purchasing and Contracting Officer:

Name: LTC Tommaso CERULLO and MCPO Luca STAZI

Telephone: +39 (06) 50525 408/7

Email address: l.stazi@ndc.nato.int; contracting@ndc.nato.int

Read carefully the instructions as stated in this document and its annexes. Failure to comply with them may cause your offer to be rejected.

Your participation in bidding is greatly appreciated.

Sincerely,

Tommaso Cerullo
Lieutenant Colonel (OF-4), ITA A com
Purchasing and Contracting Officer



ANNEX A

STANDARD BIDDING AND CONTRACT SPECIFICATIONS

1. GENERAL ASPECTS

1.1 The NATO Defense College is a NATO subsidiary body to which provisions of the Ottawa Agreement on the “Status of the North Atlantic Treaty Organization, National Representatives and International Staff” apply (for domestic suppliers Ottawa Agreement is ratified under Italian Law n. 1226 (10 Nov 1954).

1.2. The Purchasing and Contracting Officer of the NATO Defense College is responsible for applying the Bidding procedure to meet the requirements of the College, in accordance with NATO Financial Regulations and Implementing Instructions.

1.3. Implementation of this procedure does not entail any obligation to award, totally or partially, the Contract; the competent Authority may either decide not to award the contract at all or set the procedure in motion again, when necessary, in a different form.

1.4. When the Contract covers several lots, the competent Authority reserves the right to allocate some of them only and it may even decide that the other lots will be covered by one or more contracts, when necessary, under a different procedure.

1.5. Calls for Bids may be altered or cancelled in whole or in part, before the closing date, in which case the bidders will be informed in writing.

1.6. Goods and services will be purchased from governmental or commercial entities that are (1) chartered / incorporated within NATO member Nations and (2) that maintain a professionally active facility (office, factory, laboratory etc.) within NATO-member Nations. The NDC invitations to bid are not opened to any consortium of firms / companies or any type of temporary groupings of companies.

1.7. Sub-contracting is allowed only if specifically authorized. In case of sub-contracting, the contractor remains the sole party responsible to the NATO Defense College for all obligations assumed. Sub-contracting shall be limited to firms and persons of NATO member nations. Sub-contractors shall procure all permits and licenses necessary for the execution of the contract at no additional cost for the NATO Defense College. The invitation to bid is not opened to any consortium of firms / companies or any type of temporary groupings of companies.

1.8. Whenever a Basic Ordering Agreement (BOA) between NATO and the bidder already exists, it will be applicable to the present contract for the parts not specifically regulated in the context of the present call for bids and subsequent contract.

1.9. The NATO Defense College reserves the right to negotiate other contracts for additional specialized or special works with other parties, even if falling in the same professional area as the present call for bids / contract.

2. BIDS

2.1. Up to the closing date, bidders may modify or cancel their offers in whole or in part, following the same procedures as for presentation of the offers. Requests for extension of the bid closing date have to reach the Purchasing & Contracting Office in writing (fax and e-mails are acceptable) not later than 10 calendar days before the bid closure. They will be granted, at the discretion of P & C, only if supported by strong justifications. A bidder may withdraw his bid up to the date and time specified for the bid closing, by written notice to the Contracting Officer. The bid will be

returned un-opened to the bidder at his expense. Any bid received after the closing date may be considered, at the discretion of the Contract Award Committee (CAC), provided it arrives before the first CAC session.

2.2. The bid shall be submitted in accordance with the Invitation letter. It will normally be subdivided into two separate parts: the price proposal and the technical proposal:

- **the price proposal:** will be the total cost in Euro – where applicable, quoted separately for each Lot.
- **the technical proposal** (two copies) will include:
 - a. All documentation/ information required in the Invitation letter;
 - b. All documentation / Information Required in the Bidding Technical Specifications;
 - c. Any catalogues, brochures, photos, samples etc. deemed necessary.

2.3. If referred to in the Contract Technical Specifications, models or samples must be enclosed with the bid, if necessary under separate cover, provided that no price is stated or referred to.

2.4. No initial deposit is requested to participate to the bidding procedure, unless otherwise stated in the invitation letter. The bidder will provide a bank guarantee for the execution of the contract in case the contract is actually awarded. The NATO Defense College in any case reserves the right to protect its interests, either with regard to para 5.7 provisions or in case the bidder to whom the contract has been awarded does not fulfill its contractual obligations, including through other sums owed for whatsoever reason by the NATO Defense College.

3. AWARDS

3.1. When applicable, the Contracts Award Committee (CAC) awards the contract in accordance with NATO procedures. The CAC sessions are held in closed sessions limited to NATO personnel.

3.2. The CAC may accept or reject bids in whole or in part, as stated at 1.2. and 1.3. above.

3.3. The CAC selects the bid which it considers the most advantageous, considering the quotation, connected costs, the technical and functional specifications, the reliability of suppliers, the professional and financial trustworthiness of each bidder, the time schedule, and any other relevant considerations, together with any suggestion made in the bid, provided it is not in contrast with the formal instructions for presentation of the offers. Whenever the award is not based solely on price, the value/score assigned to the technical proposal and to the economic offer will be specified in the bidding documentation.

3.4. During the entire bid evaluation process the NATO Defense College reserves the right to discuss any bid with the bidders in order to clarify what is being offered and/or to obtain more detailed information. The NATO Defense College will, in any case, not be responsible for finding information which is not readily identifiable and available in the bid.

3.5. In case no communication is received within 90 days from the deadline for the offer presentation, the same will be considered as not accepted. No reasons will be given on the call for bids results.

4. PRICES

4.1. Unless differently specified in the contract / order, the prices given shall be firm and not subject to revision, even if the project / works are executed in more than one year. The price offer will separately quote the safety-related costs as part of the overall offer if specifically required.

4.2. When applicable, the terms of the contract may be extended from year to year, up to a total of five years, provided that the bidder agrees to maintain his prices.

4.3. Prices are to be quoted in Euro.

4.4. For domestic suppliers: under article 72 D.P.R. Number 633 para III.2 dated 26.10.1972 and further modifications: Services supplied and goods delivered to the NATO DEFENSE COLLEGE for its official use, shall be exempted from Value Added Tax (V.A.T.).

4.5. Similarly, for international suppliers of NATO countries, the NATO Defense College is exempted from all Customs duties and quantitative restrictions on imports and exports in respect of articles imported or exported by the College for its official use, regardless of the amount. Under this provision, goods imported by the College for its official use are also exempt from VAT.

5. BANK / INSURANCE GUARANTEE

If requested by the P&C, the Contractor must provide to NDC at the time of the signature of the contract, to ensure the adequate performance of the works/services, a bank or insurance guarantee for a value not less than 20% of the contract amount including a waiver clause regarding preliminary prosecution of the main debtor.

The guarantee must be enforceable at the first request from the NDC within a maximum period of 15 days and must include cover for a period of three months beyond the period of validity of the contract. The guarantee must include cover for a period of three months beyond the period of validity of the contract.

6. ORDERS – DELIVERY – ACCEPTANCE OF GOODS

5.1. All orders placed by the College will invariably be on numbered ordered forms or contracts signed by the Purchasing and Contracting Officer and, when required by NATO rules, by the Financial Controller Delegated, completed with the College's official stamp.

5.2. Unless otherwise stipulated by the College, goods shall be delivered F.O.B. to the following address between 0900 to 1200 hours, and 1400 to 1600 hours, Monday to Friday: NATO Defense College, Via Giorgio Pelosi 1 – I-00143 Rome, Italy, ATTN: Property & Accounting Officer (tel. 0039-6-50525338) or other agent as indicated in the contract / order.

6.3 Delivery date: deadline for delivery / works completion will be the one stated in the bidding Technical Specifications or otherwise the one stated in the contract / order. In the absence of a deadline specified in the call for bids, the bidders will indicate in their offer the proposed delivery / works completion date.

6.4 Goods must be delivered to the College address, brought to the rooms where they are to be installed/used and assembled/mounted at the supplier's care with no additional costs for the College. The firm will dismantle, remove and dispose of the replaced material wholly at its own expense, and in full compliance with applicable safety and environmental protection rules and regulations.

6.5 Goods shall be delivered, packed in accordance with the normal standards applicable to each category of supplies. The supplier shall be entirely liable for damage due to inadequate packing.

6.6 Any damage, partial or total loss of goods in transit shall be the contractor's liability only.

6.7 Unless differently stated in the bidding documentation or in the subsequent contract / order, normally a penalty of 1% of the total value of the contract may be imposed for each calendar day delay, up to 20% of the contract value, when this creates disruption for the College. The College alone will decide when any disruption has been caused. This penalty will not be imposed in the event of circumstances entirely beyond the control of the supplier, duly justified. Should the delay go beyond 30 (thirty) calendar days, the College reserves the right to cancel the order/contract or to procure the whole or part of the order from another supplier at the contractor's expense.

6.8 Activities / works will be carried out with the schedules and modes to be agreed with the NATO Defense College, in order not to interfere with its academic activities. The NATO Defense College reserves the right, in accordance with its planned activities, to request one or more suspension of works not exceeding a total of 5 (five) working days, giving at least 5 (five) calendar days' notice to the contractor prior to each requested suspension. Those suspension days will not be counted towards the delays and consequent penalties mentioned at para 5.7. No claims for costs arising from those suspensions will be considered.

6.9 Goods / services will be accepted only if they meet the contract specifications mentioned in the contract / order, and are delivered undamaged and are subject to quantity and quality checks. The equipment, goods, spare parts and their components will be new. Reconditioned, recycled or repaired goods will not be accepted. The NDC reserves the right to make the appropriate checks with the manufacturer or with other sources.

6.10 Possible disputes will be settled in accordance with para 14 provisions.

7. GUARANTEE

6.1. Goods will be guaranteed against any material or functional defects. Unless differently established in the call for bids and subsequent contract / order, the guarantee will be valid for at least two years from the date of acceptance by the College. At the time the order is accepted a bank/insurance guarantee covering 20% of the order value will be supplied by the contractor. By virtue of the guarantee all repairs and replacements will be promptly executed by the contractor. In this respect, all expenses incurred will be borne by the latter. Any replaced equipment, or part of it, will be guaranteed as from the date of replacement. Services will be rendered in line with professional standards, subject to acceptance by responsible agents or internal Board properly appointed.

6.2. Deliveries found to be defective, damaged or not up to the specifications will be returned to the suppliers for replacement.

7.3 In the event of conditions at para 6.1 and 6.2 not being respected in full, the College reserves the right either to cancel the order, or to procure the whole of the order from another supplier at the contractor's expense, or to reduce the overall price.

7.4 Unless otherwise specified in the Contract Technical Specifications, the Contractor will maintain and furnish a source of an adequate supply of components, spare parts, sub-assemblies and related services to properly maintain the equipment for a minimum of five (5) years from the warranty expiry.

8. PENALTIES

In the event of partial or total non-compliance and/or any delay in performing the agreed works by the Contractor, whatever the reason other than force majeure or due to NDC request, the NDC will apply the following penalties: 1% of the total value of the contract may be imposed for each working day delay, up to 20% of the contract value, when this creates disruption for the NDC which alone will decide when any disruption has been caused.

Should the delay go beyond 30 calendar days or in case of material/serious/fundamental breach, the NDC reserves the right to cancel the order and to procure the whole or part of the order from another supplier. This penalty will not be imposed in the event of circumstances entirely beyond the control of the supplier, duly justified.

However, the NDC, according to the specific contract requirements, has the right to include different penalties than the above-mentioned.

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. After duly informing the firm's representative of the issue concerned and receiving any justifications offered, OPR will submit its proposal to the P&C to assess the case and notify the firm of the application of the penalty in writing.

The firm is to be notified of the penalties as an administrative procedure, excluding any formal legal default notice and any judicial act or procedure. 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. Alternatively,

the NDC will avail itself of the cautionary deposit. In this case the firm is obliged to replenish the deposit up to the originally established sum.

The right of the NDC to be compensated for any further damage is in any case unquestioned.

9. INVOICES

7.1. The invoices should show the reference, the date of the order/contract, the delivery note, and give a detailed description of the goods/services together with their reference number.

7.2. Invoices must be made out in duplicate.

9.3 As stipulated under 4.4. and 4.5., the College is fully exempted from Customs duties and VAT. The terms of applicable exemption will be reported in the invoice as appropriate.

9.4 Invoices must be sent to the College, marked for the attention of the Purchasing and Contracting Officer. The contractor must mention on the invoices bank name, bank account number (IBAN & BIC codes) and any other payment references for a prompt payment of the items ordered.

10. ACCEPTANCE OF CONDITIONS

The supplier is required to return the specific Annex to the Invitation letter, duly dated and signed for acceptance by the contractor's legal representative.

11. PAYMENT

9.1 Payments will be made by bank transfer, upon delivery and technical acceptance of the contract items, within 30 calendar days from the receipt of the invoices, unless specified otherwise in the bidding documentation.

9.2 Transfer of credit is strictly forbidden under the terms of this contract, even in the form of instructions for payment to third parties included in the invoice payment instructions.

9.3 Partial payments are taken into consideration when costs of labor and equipment acquisition are high. Partial payments will be subject to achievement of agreed targets / benchmarks, and to their acceptance by the responsible technical / functional agents. Proposed schedule for partial payments is reported in the bidding documentation, or may be proposed in the offer. Request for partial payment may be part of the offer technical evaluation, with higher score assigned to lower or nil partial payment request(s).

9.4 Any partial payment will be subject to equipment delivery and entails the transfer of legal ownership of such equipment to the NATO Defense College.

12. SECURITY AND CIVIL LIABILITY

10.1 The contractors' personnel list will be notified to the NATO Defense College before the execution starts. The contractor accepts to replace immediately any employee whose presence is deemed undesirable by the NATO Defense College, without any need to state the reason. Furthermore, in no case may NATO be held responsible for the consequences of such decision.

10. 2 The College cannot be held responsible for damages suffered by the contractor's personnel or contractor's equipment while they are on the College's premises. The contractor must insure his personnel against all risks, damages, losses or injuries that the said personnel could be liable for, including damages against third parties. The insurance will be submitted to the Contracting Officer for verification of adequacy upon request.

10.3 The contractor shall repair at his expense any damage resulting from his work and inflicted to NATO buildings, equipment, services, utilities, roads and grassed areas, where such work is not included in the scope of work. Any material belonging to the contractor in use at the NATO Defense College will be the contractor's own liability.

10.4 The contractor (as well as sub-contractors) must comply with all Host Nation and European standards and regulations for health, security and safety (in particular with D. Lgs 81/2008 under the domestic legislation), and with all the applicable labour, social security and tax regulations. At any time the NATO Safety Officer and Host Nation labour inspection authorities will be entitled to inspect any contractor's activity. The contractor and sub-contractors may be asked to supply a copy of the work contracts for their employees present at the NATO Defense College.

10.5 In case of contract award the contractor will present the safety plan ("piano di sicurezza") i.a.w. Italian law. The issue of the Contract / Order is subject to acceptance of the "Documento Unico di Valutazione dei Rischi da Interferenze" (DUVRI) i.a.w. Italian Law, when applicable.

10.6 The contractor certifies that neither he nor his agents or representatives have offered or given any gratuity whatsoever to any NATO personnel, with a view of securing a contract or favorable treatment with regard to the award, modification or execution of this contract.

10.7 No news or information whatsoever (including photographs, films etc.) will be released by the contractor pertaining to this contract or any activity, programme, personnel or any other relevant information on the NATO Defense College. The contractor (and sub-contractors) shall in no circumstance use the name, emblem or official seal of NATO or of any NATO command in connection with its business or otherwise, if not duly authorized.

10.8 To safeguard order and security, the areas inside and outside the NATO Defense College premises are under video surveillance. Files of the resulting footage are accessible only to those responsible for security, and under no circumstances to any unauthorized persons. The contractor will be responsible for informing his employees that they and/or their vehicles may have to undergo a check/search upon entering and/or exiting the NATO Defense College.

10.9 Intellectual Property Rights (IPRs): Unless the Supplier has advised NATO before the acceptance of the purchase order on existing third parties or Supplier's rights arising otherwise than by virtue of this contract, and with due regard to national security regulations, all rights in the results of work undertaken by, or on behalf of, the NATO for the purposes of this contract, including any technical data specifications, report, drawings, computer software data, computer programmes, computer databases, computer software, documentation including software documentation, design data, specifications, instructions, test procedures, training material produced or acquired in the course of such work and, in particular, all rights, including copyright therein, will vest in and be the sole and exclusive property of NATO.

10.10 Except as otherwise provided in the contract, the Contractor agrees to assume all liability for the infringement, if any, of patents in force in the countries where the items will be manufactured, and in other countries where the patents are in force: and will be responsible for obtaining any patent licenses necessary for the performance of the present contract / order and for making any other arrangements required to protect NATO Defense College from any liability for patent infringement in said countries.

10.11 The NATO Defense College is a non-profit international organization which will use the goods and services purchased under the present contract for its own use and not for rent or resale. For this reason, the contractor will accept the NATO Defense College being treated as a 'consumer', thus benefitting from consumer protection laws. The contractor expressly accepts extending the same guarantees and consumer protection regulations to the NATO Defense College.

10.12 For domestic suppliers, the NATO Defense College is not part of the Italian Public Administration, and the related Host Nation / EU rules and regulations are not applicable. The NDC acts as a private entity, within the autonomous set of rules established by NATO organization.

13. TESTS AND ACCEPTANCE

11.1 It is the Contractor's responsibility to obtain, at no additional cost to NATO, the required official certificates for all parts, equipment and installations. The certificates, together with the

validated test reports, shall be made available prior to the start of the acceptance testing by NATO. All new electrical and mechanical installations or modifications must be inspected and accepted by a certified inspection agency when required by Host Nation or International regulations.

11.2 Acceptance shall be conclusive, except for latent defects, fraud, gross mistakes amounting to fraud, or otherwise stated in the Contract. It is the action by which NATO acknowledges that the Contractor has fully demonstrated that the deliveries are complete and operational.

11.3 Acceptance will be accomplished when the following requirements are met:

- Availability at final destination of all deliverables;
- Successful completion of technical testing;
- Verification of the inventories.
- Satisfactory completion of all training or other required services, if any.

14. LANGUAGES / PREVAILING VERSION

12.1 In case of documents issued in more than one language (call for bids, annexes, orders, etc.), the English version prevails in case of dispute.

12.2 In case of different provisions between the General Contract Specifications and the Technical Contract Specifications in the call for bids, the latter will prevail.

15. APPLICABLE LAW

The United Nations Convention on Contracts for the International Sale of Goods will not apply to this contract. The Supplier confirms that it has been notified by the NATO Defense College prior to the Supplier's acceptance of the purchase order to the effect that NATO, including its personnel, assets, and facilities, enjoys immunity from jurisdiction and execution in all member states of the Alliance.

16. DISPUTES - ARBITRATION CLAUSE

14.1 All possible disputes deriving from the award or the execution of this contract not referred to other specific agreement will be settled by the Contracting Officer, who will render his decisions in writing and provide a copy to the Contractor.

14.2 Within thirty calendar days from the date of receipt of such copy, the Contractor may appeal in writing to the "Chairman – Contracts Award Committee" of the NATO Defense College through the Contracting Officer for a written decision which will be rendered within 30 calendar days.

14.3 The decision of the Contracts Award Committee shall be final unless the Contractor – within thirty calendar days from receipt of the decision – requests the Command to submit the dispute in question to arbitration.

14.4 Disputes arising from performance and the interpretation of the contract which are not settled by agreement will be submitted to arbitration as follows:

The party instituting the arbitration proceedings shall advise the other party by registered letter, with official notice of delivery, of his desire to have recourse to arbitration. Within a period of thirty days from the date of receipt of this letter, the parties shall jointly appoint an arbitrator. In the event of failure to appoint an arbitrator, the dispute(s) shall be submitted to an Arbitration Tribunal consisting of three arbitrators, one being appointed by the NATO Defense College, another by the other contracting party, and the third, who shall act as President of the Tribunal, by these two arbitrators. Should one of the parties fail to appoint an arbitrator during the fifteen days following the expiry of the first period of thirty days, or should the two arbitrators be unable to agree on the choice of the third member of the Arbitration Tribunal, within thirty days following the expiry of the said first period, the appointment shall be made, within twenty-one days, at the request of the party instituting the proceedings, by the Secretary General of the Permanent Arbitration Court in The Hague. Regardless of the procedure concerning the appointment of this

Arbitration Tribunal, the third arbitrator will be of a nationality different from that of the other two members of the Tribunal. Any arbitrator must be a national of any of the member states of NATO and shall be bound by the rules of security in force within NATO. Any person appearing before the Arbitration Tribunal in the capacity of an expert witness shall, if he is a national of one of the member states of NATO, be bound by the rules of security in force within NATO; if he is of another nationality, no NATO classified documents or information shall be communicated to him.

An arbitrator who, for any reason whatsoever, ceases to act as an arbitrator, shall be replaced under the procedure laid down above.

The Arbitration Tribunal will take its decision by majority vote. It shall decide where it will meet and, unless it decides otherwise, shall follow the arbitration procedures of the International Chamber of Commerce in force.

The awards of the arbitrator of the Arbitration Tribunal shall be final and there shall be no right of appeal or recourse of any kind. These awards shall determine the apportionment of the arbitration expenses.



NATO Defense College — College de Defense de l'OTAN

Technical specifications for Course Member Information System

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1. Programme introduction

The NATO Defense College (NDC) is embarking on a **significant digital transformation initiative** which is critical for modernizing its operational capabilities and enhancing the efficiency of its educational processes.

The current landscape of the NDC's business applications can be described as siloed systems with limited integration. Processes are still largely manual; an initial implementation of Salesforce has been made to cover some of the College's functionalities, while other activities continue to be managed through Microsoft applications or even on paper. Despite efforts to centralise and automate core processes, the current setup hinders the achievement of a fully integrated and data-driven operational model.

Therefore, the NDC is issuing a Request for Proposal (RFP) to replace, integrate, and significantly enhance the College's existing applications, fostering a more streamlined and efficient operational framework.

2. Programme description

The digital transformation programme at the NATO Defense College (NDC) is fundamentally driven by a comprehensive understanding of existing operational inefficiencies and strategic imperatives. A rigorous discovery phase revealed a consistent set of challenges that require a transformative approach, highlighting the need to move from disparate systems and workflows to a cohesive, digitally enabled environment.

The programme's core objective is to address foundational challenges, establishing a robust digital infrastructure that strengthens operational capabilities and supports greater strategic agility.

2.1 Strategic vision and priorities

The strategic vision for NDC's digital transformation is anchored in four key areas, reflecting a clear mandate from leadership to modernize and streamline operations.

Centralization and Digitalization: This priority aims to establish a unified digital hub that integrates internal procedures and fosters enhanced coordination across all NDC departments. The objective is to transition from manual, paper-based operations to efficient digital processes, thereby improving overall organizational coherence and responsiveness.

Data Management and Integration: A key aspect of the transformation is the development of a robust data management framework. This involves creating a single source of truth, significantly reducing data duplication, strengthen security protocols, and facilitating seamless integration across various databases and systems. The goal is to ensure data accuracy, consistency, and accessibility at all levels.

Process Optimization and Coordination: This area focuses on revamping and automating existing processes to improve usability, efficiency, and inter-departmental coordination. By creating a modern, integrated environment, the programme seeks to support both academic and administrative functions more effectively, eliminating bottlenecks and enhancing workflow.

Change Management and Training: Recognizing that technological adoption is intrinsically linked to human factors, this priority emphasizes targeted change management strategies. Comprehensive staff training will be provided to ensure successful tool adoption, mitigate resistance to change, and ultimately enhance operational efficiency across the college.

In the end, the NATO Defense College (NDC) envisions a future where its operations are fundamentally transformed through digital innovation, fostering a highly efficient, data driven and secure environment. This vision encompasses a **transition to a paperless ecosystem**, significantly **enhancing operational agility and sustainability**.

2.2 Expected transformation outcomes

The digital transformation programme is set to deliver **significant outcomes** across the NDC by **addressing identified pain points and fostering a more agile and efficient institution**. It will enhance operational efficiency by digitalising and automating manual processes, reducing administrative overhead and accelerating workflows.

The programme will create a **unified data ecosystem** that eliminates fragmentation and ensures consistent, accurate, and up-to-date information, improving decision-making. **Processes will be streamlined** to clarify workflows, optimise resource allocation, and enhance coordination between academic and support departments. **Security and access** management will be **improved** through robust protocols and flexible permission levels, safeguarding sensitive information while maintaining appropriate access. Additionally, **increased digital literacy and adoption** will be achieved through comprehensive training and change management, empowering staff to utilise new digital tools. Together, **these outcomes will contribute to a modern, integrated environment that supports NDC's mission** with greater effectiveness and strategic foresight.

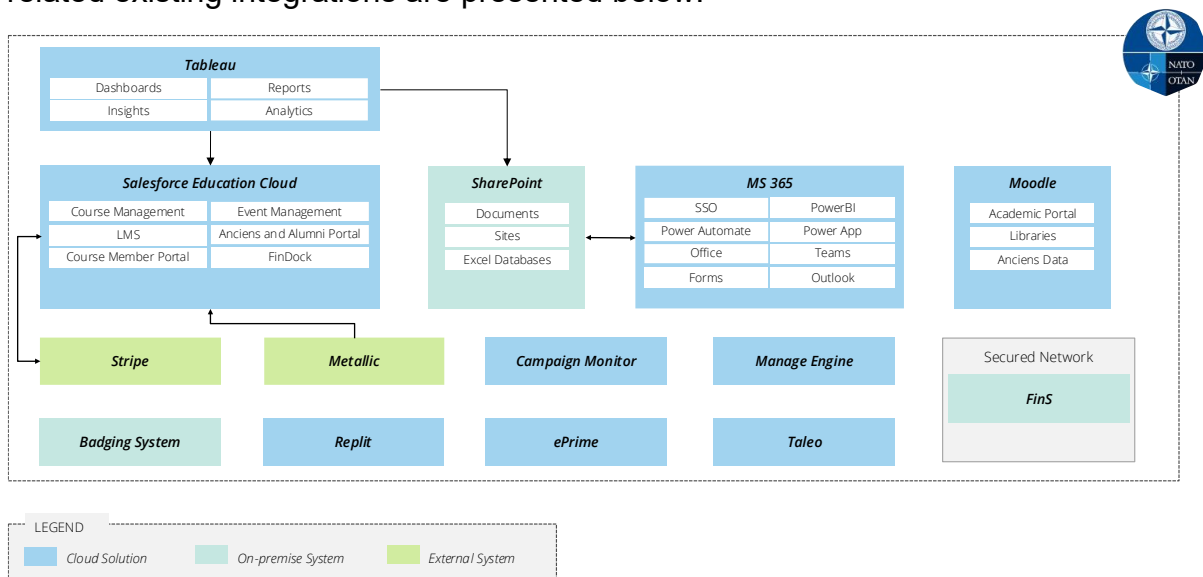
3. Current state and architecture

The **current state** of the NATO Defense College (NDC) informed by several areas, has revealed **critical pain points** impacting operational efficiency and strategic agility.

- Fragmented and manual data management. Data silos and inconsistencies arise from manual handling, leading to excessive time spent on reconciliation, which hampers informed decision-making.
- Lack of system integration and automation. Disconnected systems require manual data transfers, causing redundant work and increasing the risk of errors.
- Inefficient workflows and manual processes. Workflows are slow and mainly managed manually, creating bottlenecks and diverting staff from core responsibilities.
- Complex user access. Multiple user accounts and current access management practices negatively impact user experience.
- Inadequate planning and scheduling tools. Poor tools limit effective resource allocation and timeline management, resulting in suboptimal use of assets and personnel.

- Manual document and forms handling. Reliance on paper-based processes increases administrative burden, storage needs, and risks of lost or misfiled information.
- Inefficient communication and collaboration. Non optimised inter-departmental communication slows project execution and reduces overall productivity.
- Inefficient resource and asset management. Lack of visibility and control over assets leads to underutilisation and challenges in maintenance scheduling.
- Limited use of AI and digital technologies. Underutilisation of advanced analytics and automation restricts operational intelligence and predictive capabilities.
- Resistance to change and low digital adoption, highlighting the need for change management and training.

To provide context regarding the current situation, the **current architectural map** and related existing integrations are presented below.



4. Overall requirements of NDC

The **target-state capabilities and requirements** have been thoughtfully organized into **three distinct work packages**, each designed to guide the transformation journey in a structured, fluid, and value-oriented manner and **composing LOT 1A** of this bid. This approach ensures that the implementation can progress in manageable increments, allowing for clearer prioritization, better risk mitigation, and continuous delivery of tangible benefits to the NDC organization.

LOT1B encompasses the requirements of NDC to have ongoing system administration and minor development support throughout the duration of LOT1A.

In addition to LOT 1, a **second and separate LOT** (LOT 2) has been established specifically for the **procurement of all licenses** necessary to enable the full solution. This dedicated track helps guarantee that the technological components are available at the right time to support execution without delays.

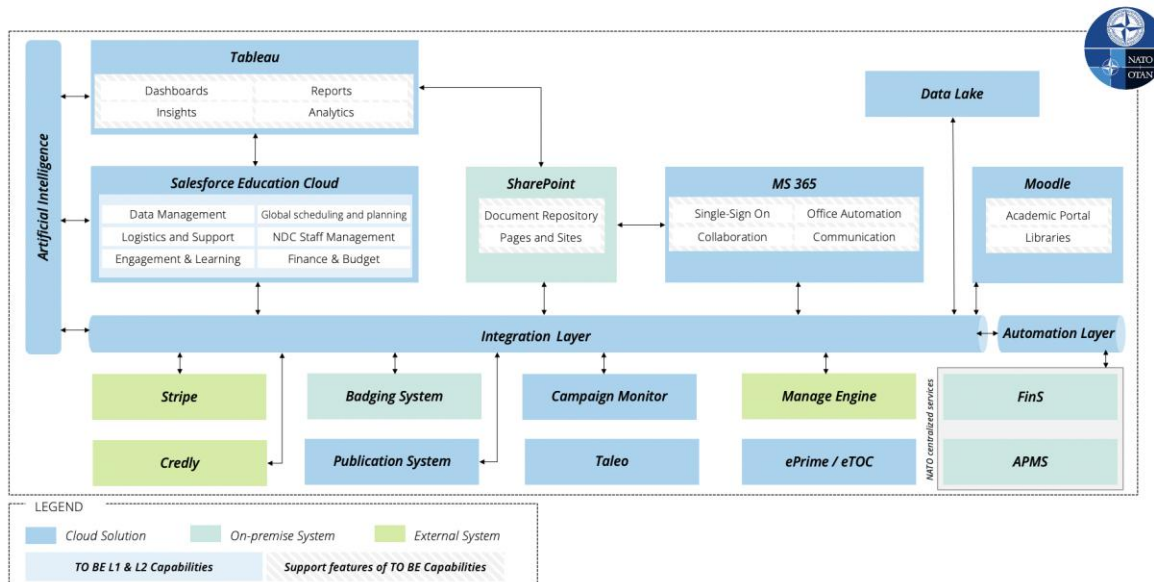
4.1 Capability map and target architecture

To provide clarity and ensure proper alignment, the **capability map**—understood as the set of functionalities that must be implemented—has been structured across two levels, offering a clear and hierarchical view of the solution’s scope and is reported below.

| L1 | Data management | Engagement and learning | Global scheduling and planning | Logistics and support | Finance and budget | NDC staff management |
|----|---|-------------------------------|-----------------------------------|---------------------------|------------------------------|-----------------------------|
| L2 | Centralised data and account management | Courses and events management | Project and task management | Asset and inventory | Financial process automation | Process optimization |
| | AI and advanced analytics | Stakeholders and lifecycle | Memos management | Mess management | Financial planning | Onboarding and HR processes |
| | Security and access permissions | Learning and lecturers | Scheduling and planning | Transportation management | Travel requests | Absence tracking |
| | Systems integration | Publication management | Resources and capacity management | | | Teleworking requests |
| | Business intelligence | Visits management | Document and content management * | | | |
| | | Fellowship management | | | | |

*It is important to note that the capability “Document and content management” has already been delivered through a dedicated project and will therefore be integrated rather than redesigned.

The **target architecture** of the new system has been designed to provide a robust, scalable, and flexible framework that fully supports the organization’s strategic objectives and operational needs. It integrates all key functional components, data flows, and technological layers in a coherent and well-structured manner, ensuring seamless interaction between modules while enabling future growth and adaptability.



The solution must include a solid API versioning to manage an eco-system evolving continuously, with the following main aspects:

- Backward compatibility with older API versions and minimal impact during upgrades

- Predictable integrations, including the API version in the endpoint and eventual middleware configurations
- Track API changes and perform regression and compatibility tests

a. LOT 1A – Work package 1: Capabilities and related requirements

The first work package represents the initial and most critical phase of the implementation journey, as it lays the foundation upon which all subsequent activities will be built. Its scope has been carefully defined to ensure that the organization can rapidly capture tangible benefits while establishing the core functional pillars of the target solution.

Accordingly, this first workstream will encompass the following key L2 capabilities:

- Centralised data and account management
- Systems integration as detailed in the requirements table
- Stakeholder and lifecycle
- Learning and lectures
- Project and task management
- Memos management
- Scheduling and planning

The capabilities are detailed with the requirements listed below

| Capability | # | Requirement description |
|---|---------------|---|
| Centralised data and account management | DM-CDAM-01-01 | Consolidate accounts wherever feasible to minimise the total number of records, thereby simplifying administration and enhancing the overall user experience. |
| Centralised data and account management | DM-CDAM-01-02 | Configure the system to automatically deliver current contact details of course members to faculty advisors, eliminating manual duplication and improving data accuracy. |
| Centralised data and account management | DM-CDAM-01-03 | Establish a centralised Data Lake to aggregate diverse data sources, enabling unified and seamless access to comprehensive information |
| Centralised data and account management | DM-CDAM-01-04 | Deploy a shared calendar system to enhance scheduling efficiency, improve coordination among stakeholders, and minimise fragmentation. |
| Centralised data and account management | DM-CDAM-01-05 | Execute a one-time migration of legacy data into Salesforce (or an appropriate system) to centralise information, facilitating improved querying and streamlined data management. |

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| Centralised data and account management | DM-CDAM-01-06 | Implement a unified stakeholder management system to centralise interactions, streamline communications, and eliminate duplicate outreach efforts. |
| Centralised data and account management | DM-CDAM-02-01 | Implement an account management system for course members to consolidate user accounts and reduce their number. |
| Centralised data and account management | DM-CDAM-02-02 | Implement Single Sign-On (SSO) to allow course members seamless access to all applications using a single set of credentials, thereby simplifying both the user experience and administrative management. |
| Centralised data and account management | DM-CDAM-03-01 | Store passport information in Salesforce to centralise data and reduce the need for frequent manual verification. Use Salesforce to automate or streamline passport validation processes. |
| Centralised data and account management | DM-CDAM-04-01 | Implement unified account management to comprehensively track all roles and positions held by individuals, ensuring accurate and complete personnel information. |
| Systems integration | DM-SI-01-01 | Integration with Tableau to manage analytics on Salesforce data and aggregated views with data from other systems |
| Systems integration | DM-SI-01-02 | Integration with Microsoft Entra ID to manage SSO authentication and authorization |
| Systems integration | DM-SI-01-03 | Integration between Salesforce and SharePoint to build a seamless integrated document management system to manage document creation, upload, modification, metadata synchronization, versioning management, and enhanced searching engine. |
| Systems integration | DM-SI-01-04 | Integration with Moodle to manage data migration and user synchronization |
| Systems integration | DM-SI-01-05 | Integration with Microsoft Outlook to manage integrated booking functionalities, availability checks, and calendar synchronization |
| Systems integration | DM-SI-01-11 | Integration with Publication System to retrieve data about lecturer publications |
| Stakeholders and lifecycle | EL-SL-02-01 | Develop a system to comprehensively track stakeholder interactions, including visits, discussions, and other engagements. Ensure the system records detailed information about each interaction |

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| | | to support thorough documentation and follow-up. |
| Stakeholders and lifecycle | EL-SL-02-02 | Design the system to allow quick and intuitive access to stakeholder data, with robust search functions to facilitate effective relationship management. |
| Stakeholders and lifecycle | EL-SL-02-03 | Enable the system to store and organise information in a way that preserves institutional knowledge and aids ongoing stakeholder engagement. |
| Stakeholders and lifecycle | EL-SL-03-01 | Develop a system to track the complete lifecycle of course members, including current participants, Anciens, and Alumni, record detailed histories such as past course participation and subsequent career progression. |
| Stakeholders and lifecycle | EL-SL-03-02 | Ensure the system to track course members lifecycle minimises manual data entry to reduce errors and maintain up-to-date, reliable information. Also, streamline data management processes to lower administrative workload and improve operational efficiency. |
| Stakeholders and lifecycle | EL-SL-05-01 | Develop a unified platform that consolidates data from both ePrime and eTOC systems into a single accessible repository. |
| Stakeholders and lifecycle | EL-SL-05-02 | Enable straightforward retrieval and extraction of course information and travel protocols from the platform and automate data consolidation and updates to minimise the need for manual tracking and follow-up actions. |
| Stakeholders and lifecycle | EL-SL-05-03 | Provide enhanced transparency and real-time visibility of relevant information to authorised users. |
| Stakeholders and lifecycle | EL-SL-05-04 | Facilitate efficient preparation of travel-related communications for the Commander and senior staff by providing accurate and timely data. |
| Stakeholders and lifecycle | EL-SL-06-01 | Track all information related to interactions for Key Leaders Engagement, ensuring the system captures and records every engagement, providing a complete view of stakeholder relationships and centralise all stakeholder information in one place to improve data accessibility and support effective relationship management. |
| Stakeholders and lifecycle | EL-SL-06-02 | Enable importing of past interaction data from multiple sources to maintain |

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| | | continuity and preserve comprehensive engagement histories. |
| Learning and lecturers | EL-LL-01-01 | Enable the creation and management of surveys and evaluations directly within the Learning Management System (LMS). |
| Learning and lecturers | EL-LL-01-02 | Associate each survey or evaluation with the specific course it pertains to, ensuring a clear and unique connection between training content and feedback tools. |
| Learning and lecturers | EL-LL-01-03 | Allow authorised users to easily access survey and evaluation results directly from the course interface, without needing to switch to external systems or separate modules. |
| Learning and lecturers | EL-LL-01-04 | Provide integrated analysis and reporting features that enable interpretation of collected data, facilitating the monitoring of training effectiveness and continuous course improvement. |
| Learning and lecturers | EL-LL-02-01 | Develop a centralised database to store detailed information about lectures, recording also precise dates and times for each lecture delivered. |
| Learning and lecturers | EL-LL-02-02 | Include comprehensive profiles for each lecturer, covering their name, qualifications, and contact information. |
| Learning and lecturers | EL-LL-02-03 | Catalogue the subjects and themes addressed in every lecture for easy reference and searchability. |
| Learning and lecturers | EL-LL-02-04 | Store evaluations or feedback related to each lecture's quality and effectiveness. |
| Learning and lecturers | EL-LL-02-05 | Track and document opportunities or interest for future lectures or collaborations with each lecturer. |
| Learning and lecturers | EL-LL-02-06 | Develop a dedicated state model for lecturers capturing personal, academic, employment, and publication data, enabling comprehensive tracking of research outputs and professional milestones |
| Learning and lecturers | EL-LL-02-07 | Implement reports and dashboards to monitor lecturer data and visualize KPIs filtering and export features ensuring data accuracy, security, and actionable insights for academic management |
| Learning and lecturers | EL-LL-03-01 | Activate feedback and Q&A modules for courses, reducing manual setup and ensuring timely availability. |
| Learning and lecturers | EL-LL-03-02 | Enable course module activation according to predefined conditions, such |

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| | | as the course's start or end dates, or specific actions taken by the instructor. |
| Learning and lecturers | EL-LL-03-03 | Ensure that each course has a single, unified feedback link accessible to all participants, eliminating multiple or duplicate links. Also, implement checks to prevent the creation of redundant feedback links, maintaining clarity and ease of access for users. |
| Learning and lecturers | EL-LL-05-01 | Implement a scalable academic portal solution that complies with NATO-level security and operational standards, with the goal of enhancing user experience and system performance |
| Learning and lecturers | EL-LL-05-02 | Archive older course data and compressed files (zip archives) of past courses, thereby reducing the data load and keeping only current and recent courses active there. |
| Learning and lecturers | EL-LL-05-03 | Embed the Credly badge workflow into the Anciens Portal, enabling both automatic processing and user-initiated actions (such as via a dedicated button) to simplify and streamline the management of digital credentials. |
| Learning and lecturers | EL-LL-04-01 | Develop a fully digital process for preparing the lecturer invitation package, including Formal invitation letter, Lecturer information form (annex to invitation letter, including payment details), Reply form (basic Word document), All receipts (e.g., hotel invoices) and Permission list (annex containing authorisations). |
| Learning and lecturers | EL-LL-04-02 | Implement an automation for generating and distributing invitation letters, including the specific Carabinieri letter, to minimise manual effort and reduce delays. |
| Learning and lecturers | EL-LL-04-03 | Enable approvals by the Faculty Advisor in charge, who is responsible for signing the lecturer invitation package documents, to accelerate the approval process and reduce paper usage. |
| Learning and lecturers | EL-LL-04-04 | Integrate and automate the permission list process facilitating streamlined collection, tracking, and management of authorisations. |
| Learning and lecturers | EL-LL-04-05 | Automate the submission, tracking, and management of transportation requests related to lecturers to improve operational efficiency. |

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| Learning and lecturers | EL-LL-04-06 | Create a centralised, automated room booking and approval system integrated with Salesforce to enhance visibility, coordination, and efficiency in managing physical spaces. |
| Project and task management | GSP-TM-03-01 | Create a digital workflow to manage the collection of annual report inputs, reducing reliance on manual follow-up, use existing data stored in Salesforce to identify contributors and track submission statuses. |
| Project and task management | GSP-TM-03-02 | Develop a mechanism to send timely reminders to annual report contributors, prompting them to submit their inputs by deadlines. |
| Project and task management | GSP-TM-01-01 | Develop a unified platform to manage tasks and projects across the organisation, automating and optimising processes to reduce bottlenecks and improve efficiency. |
| Project and task management | GSP-TM-01-02 | Provide stakeholders with real-time insights into project statuses, task progress, and resource allocation |
| Project and task management | GSP-TM-01-03 | Facilitate collaboration and communication among teams to enhance overall project delivery. |
| Project and task management | GSP-TM-02-01 | Implement automation to generate tasks based on predefined triggers or workflows. |
| Project and task management | GSP-TM-02-02 | Enable assignment of tasks to individual users with the ability to monitor completion status separately for each assignee and send timely notifications to assignees with actionable tasks and inform other relevant stakeholders as needed. |
| Project and task management | GSP-TM-02-03 | Ensure clear tracking and communication to improve task management and accountability. |
| Memos management | GSP-MM-01-01 | Implement a system to manage the entire memo management process and automate the routing of memos and track signatures and views using electronic signature tools. |
| Memos management | GSP-MM-01-02 | Develop a project management tool that integrates with the memo system, with configurable settings to make memo linkage mandatory or optional depending on the project type, ensuring proper approval and documentation. This allows to link memos to relevant decisions and workflows |

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| Memos management | GSP-MM-01-03 | Develop functionality to assign unique registry numbers to memos automatically upon creation or submission. |
| Memos management | GSP-MM-01-04 | Automate the finalisation of documents and ensure signed memos are automatically submitted to the registry, improving efficiency and traceability. |
| Scheduling and planning | GSP-SP-01-01 | Create and deploy a unified digital platform to enhance coordination, streamline communication, and foster collaboration across departments by enabling synchronization between the meeting system and calendar applications to automate meeting imports and keep schedules current. |
| Scheduling and planning | GSP-SP-01-02 | Develop an automated weekly calendar that receives real-time updates and changes, facilitating seamless sharing and improving overall coordination. |
| Scheduling and planning | GSP-SP-02-01 | Implement processes and tools to resolve scheduling conflicts and establish clear prioritisation of activities, aligned with leadership intent and regulatory requirements by developing an integrated digital planning system that combines long-term and day-to-day planning, enhancing coordination, visibility, and management of courses and ad hoc events. |
| Scheduling and planning | GSP-SP-02-02 | Establish a unified process and platform for managing operational data such as hotel bookings, promoting standardisation, improved coordination, and efficiency across branches. |
| Scheduling and planning | GSP-SP-02-03 | Automate the submission and processing of Teams-related requests to eliminate manual tasks and streamline workflows. |
| Scheduling and planning | GSP-SP-03-01 | Develop and deploy a digital tool designed to automate medium-term forecasting activities and incorporate features and algorithms that improve the precision and reliability of forecasts. |
| Scheduling and planning | GSP-SP-03-02 | Streamline data collection, analysis, and reporting to reduce manual effort and accelerate forecasting cycles. |
| Scheduling and planning | GSP-SP-04-01 | Create a scheduling system capable of managing weekly plans with minute-level precision and ensure the tool consolidates lectures, committee meetings, and events into a unified schedule. |

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| Scheduling and planning | GSP-SP-04-02 | Implement features to notify all relevant stakeholders immediately of any changes in scheduling, supporting agility and effective coordination. |
| Scheduling and planning | GSP-SP-05-01 | Design automated workflows with defined triggers that activate actions at precise points within each process, including timing mechanisms to ensure activity support is engaged at the correct phase, neither too early nor too late. |
| Scheduling and planning | GSP-SP-06-01 | Implement an automated system with reminders, alerts, and notifications to collect availability of flag officers, the dean, and the commandant for Top Table organization. |
| Scheduling and planning | GSP-SP-06-02 | Enable the system to automatically schedule and populate the Top Table based on collected availability data and use automated notifications to keep all relevant parties informed throughout the scheduling process, ensuring efficiency and accuracy. |
| Scheduling and planning | GSP-SP-07-01 | Create a digital process to generate and manage the duty officer calendar with partial automation. |
| Scheduling and planning | GSP-SP-07-02 | Implement rules to allocate duty turns fairly based on each division's capacity with the possibility to self-service turn confirmation and switches |
| Scheduling and planning | GSP-SP-07-03 | Digitalize and automate the turn report management at the end of each turn |
| Scheduling and planning | GSP-SP-07-04 | Provide access to the duty officer calendar via a shareable online link for ease of viewing and coordination. |
| Scheduling and planning | GSP-SP-07-05 | Include features to automatically generate duty report documents and archive them in the document management system |

b. LOT 1A – Work package 2: Capabilities and related requirements

The second work package represents the subsequent and intermediate phase of the implementation, building upon the foundation established by the first phase. Its focus is on introducing additional functionalities and enhancements that create incremental value, further strengthening the solution and expanding its impact across the organization.

This phase is designed to ensure continuity in the transformation journey, and it will encompass the following key L2 capabilities, which complement and extend the progress achieved in the initial phase:

- Systems integration as detailed in the requirements table
- AI and advanced analytics
- Business intelligence
- Courses and events management
- Resources and capacity management
- Financial process automation
- Financial planning
- Transportation management
- Mess management
- Process optimization

The capabilities are detailed with the requirements listed below

| Capability | # | Requirement description |
|---------------------------|--------------|---|
| Systems integration | DM-SI-01-09 | Integration with FinS to automate financial activities; this could involve RPA functionalities |
| AI and advanced analytics | DM-AAA-02-01 | Develop a tool, potentially leveraging AI, to assist in creating committees based on criteria such as gender balance, language skills, and skill levels, allowing responsible personnel to review and adjust the proposed composition. |
| Business Intelligence | DM-BI-01-01 | Implement a unified, integrated platform for the collection and analysis of feedback, designed to centralise data management, enhance real-time insights, accuracy, consistence, and significantly improve operational efficiency across all relevant functions, fully aligned with the NDC Assessment Model and Analytical Hierarchy Process. |
| Business Intelligence | DM-BI-01-02 | Automate the end-to-end feedback collection process from all stakeholders, including course members, faculty advisors, and lecturers, ensuring timely, consistent, and accurate data capture. Ensure the process comprehensively supports all feedback channels, including course members, faculty advisors, daily feedback, field studies, and end-of-course evaluations, while streamlining and simplifying the feedback submission and management process for all users. |
| Business Intelligence | DM-BI-01-03 | Leverage AI capabilities to automatically extract data from Microsoft Forms and |

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| | | transform it into predefined report templates or directly populate the Course Planning Evaluation (CPE), thereby increasing accuracy and reducing manual processing time. |
| Business Intelligence | DM-BI-01-04 | Implement AI-driven summarisation tools to condense and synthesise comments from course members, enhancing the efficiency and clarity of report generation. |
| Business Intelligence | DM-BI-01-05 | Streamline the feedback process by automating quantitative data analysis and report generation, facilitating prompt and informed adjustments to courses. |
| Business Intelligence | DM-BI-02-01 | Create a comprehensive risk management solution that consolidates risk tracking and visualisation within a single, unified platform. |
| Business Intelligence | DM-BI-02-02 | Facilitate more frequent and integrated risk assessments to enhance efficiency and responsiveness in risk management |
| Business Intelligence | DM-BI-03-01 | Implement a more scalable and organised archiving solution that ensures sufficient storage space and facilitates easy retrieval of satisfaction surveys and related data. |
| Business Intelligence | DM-BI-04-01 | Explore and implement alternative, cost-effective social media connector options to enable data integration and analysis without incurring prohibitive expenses. |
| Business Intelligence | DM-BI-05-01 | Automate the Analytical Hierarchy Process for evaluating course performance, including integration with the dashboard, so users can directly access underlying data by selecting specific study periods. |
| Courses and events management | EL-CEM-01-01 | Implement a Q&A knowledge base to provide instant responses and reduce routine inquiries. |
| Courses and events management | EL-CEM-01-02 | Deploy a chatbot to deflect routine requests, decreasing workload and improving response times. |
| Courses and events management | EL-CEM-02-01 | Integrate daily activity monitoring directly into the Course Member Portal to enhance data precision, accessibility, and user engagement. |
| Courses and events management | EL-CEM-02-02 | Develop an automated solution that accurately computes individual expenses, generates corresponding receipts, and seamlessly distributes them via BUDFIN email to each member, thereby boosting operational efficiency and reducing errors. |

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| Courses and events management | EL-CEM-02-03 | Implement automation within the Course Member Portal to streamline visa support letter requests, evaluating the possibility to incorporate AI capabilities to generate customised information tailored to individual needs. |
| Courses and events management | EL-CEM-03-01 | Create a centralised digital platform for field studies process documentation that supports collaborative editing, minimises manual revisions, and significantly cuts down on email correspondence. |
| Courses and events management | EL-CEM-03-02 | Design and launch a mobile application (Mobile Community) that complements the Course Member Portal by centralising key information and facilitating seamless access and communication for users on mobile devices. |
| Courses and events management | EL-CEM-04-01 | Streamline and formalise the workflow for the Conference of Commandants (CoC), with the aim of standardising the process and extending this structured approach to other related events. |
| Courses and events management | EL-CEM-04-02 | Create a standardised and flexible programme and knowledge base for the Conference of Commandants (CoC) that accommodates yearly variations in host nations, participant data needs, and fee structures, ensuring consistent management and simplified updates |
| Courses and events management | EL-CEM-05-01 | Implement personalised invitations for CoC participants that include a unique registration link, simplifying the registration process and enhancing participant experience. |
| Courses and events management | EL-CEM-06-01 | Implement a scalable email distribution system capable of handling large contact lists efficiently. |
| Courses and events management | EL-CEM-07-01 | Establish a digital event management workflow across all divisions, leveraging the NDC Event App to standardise and optimise event coordination processes. |
| Courses and events management | EL-CEM-07-02 | Promote wider adoption of the NDC Event App for organising smaller-scale events, aiming to increase usage and enhance consistency in event management across the organisation |
| Courses and events management | EL-CEM-08-01 | Extend access to the Course Member Portal to event attendees, providing them with the same tools and resources |

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| | | available to course members to enhance their experience and participation. |
| Courses and events management | EL-CEM-12-01 | Digitalise the tracking of course members participation to streamline the process and improve accuracy. |
| Courses and events management | EL-CEM-12-02 | Digitalise credit accreditation to enable calculation for final report and diploma supplements |
| Courses and events management | EL-CEM-13-01 | Automate the data extraction from Credly and subsequent upload processes, ideally scheduling regular automated transfers (e.g., every Friday at 2 pm) to streamline badge management and reduce manual effort. |
| Courses and events management | EL-CEM-14-01 | Develop a system to automate the creation, sending, and management of invitations for visits. |
| Courses and events management | EL-CEM-14-02 | Implement functionality to monitor invitation status, including sent, received, accepted, declined, and reminders and enable automated follow-up messages and notifications to invitees, reducing manual effort and enhancing accuracy while ensuring the overall process reduces errors, saves time, and provides real-time visibility into invitation statuses. |
| Resources and capacity management | GSP-RCP-01-01 | Develop a single, comprehensive calendar to track all planned activities organisation-wide, with real-time updates to reflect any changes immediately. |
| Resources and capacity management | GSP-RCP-01-02 | Link room and premises reservation systems directly to the global calendar to optimise logistics and prevent scheduling conflicts or overbooking. |
| Resources and capacity management | GSP-RCP-01-03 | Ensure seamless integration with Microsoft Outlook for user convenience, and synchronization with Service Desk Plus to support efficient scheduling and resource management. |
| Resources and capacity management | GSP-RCP-01-04 | Create a consolidated booking platform that manages reservations for rooms, auditoria, and other physical facilities within one environment, enhancing coordination and administrative control. |
| Resources and capacity management | GSP-RCP-02-01 | Develop a system to digitise the entire process of creating and managing OP orders, facilitating timely and coordinated preparation across logistics departments. |

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| Resources and capacity management | GSP-RCP-02-02 | Enable early-stage drafting and approval of OP orders, aligned with event planning schedules to ensure readiness and reduce last-minute changes. |
| Resources and capacity management | GSP-RCP-02-03 | Streamline workflows to enhance collaboration, minimise errors, and accelerate the overall OP order process. |
| Resources and capacity management | GSP-RCP-03-01 | Create a dashboard that consolidates comprehensive staff count data to provide a clear overview of capacity by consolidating data from various sources to provide a comprehensive view of staff, including those engaged in field activities. |
| Resources and capacity management | GSP-RCP-03-02 | Design and incorporate metrics on staff workload and presence to offer a complete picture of resource availability. |
| Resources and capacity management | GSP-RCP-03-03 | Design the dashboard to aid effective allocation of personnel and strategic planning within CMD. Ensure the dashboard delivers up-to-date and precise capacity information to support informed decision-making. |
| Financial process automation | FB-FPA-03-01 | Implement a digital process to manage approvals for Purchase requisitions (contracting office, fiscal, and accounting). |
| Financial process automation | FB-FPA-03-02 | Implement a process to manage approvals for travel requests and travel claims. |
| Financial process automation | FB-FPA-03-03 | Implement a process to manage approvals for event payment collections and cost fee payments. |
| Financial process automation | FB-FPA-03-04 | Create standardised digital templates for purchase requisitions (contracting office, fiscal and accounting), travel requests/claims, event payment collections, and cost fee payments processes, to facilitate straightforward manual data transfer into the FinS system, given that direct integration is not feasible. |
| Financial process automation | FB-FPA-03-05 | Develop an electronic invoice template and workflow to eliminate manual handling, speeding up approval and processing stages. |
| Financial process automation | FB-FPA-03-06 | Implement a digital process for submitting, approving, and managing expenses, including clear approval routing. |
| Financial process automation | FB-FPA-03-07 | Configure the system to send alerts and confirmations related to payment approvals, keeping all relevant stakeholders informed in real time. |

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| Financial automation process | FB-FPA-04-01 | Implement automated notifications when finance items are approved or rejected. |
| Financial automation process | FB-FPA-04-02 | Set up escalation procedures that activate if approvals or actions are not completed by the specified due dates. Also, configure automatic reminders for pending actions approaching deadlines, such as requisitions requiring approval within two days. |
| Financial automation process | FB-FPA-04-03 | Design a dedicated process that initiates when budget transfer requests exceed predefined thresholds, ensuring timely review and authorisation. |
| Financial planning | FB-FP-02-01 | Automate the subsidization process by creating a calculator to determine the percentage of subsidization, participation, and other related necessary information. |
| Financial planning | FB-FP-02-02 | Provide the subsidization process with business rules and file generation capabilities. |
| Financial planning | FB-FP-01-01 | Develop a planning system for budgeting that accommodates three types of requirements and digitalise the request process. |
| Financial planning | FB-FP-01-02 | Integrate the planning solution with communication and document platforms (Outlook and SharePoint), implement budget reminders, and automate contract generation. |
| Transportation management | LS-TT-01-01 | Create a unified platform to consolidate requests for both collective transport (e.g., shuttles) and private vehicles, introducing a single, streamlined digital interface for all transportation requests. |
| Transportation management | LS-TT-01-02 | Enable users and administrators to view the status and progress of transportation requests in real time to facilitate better management of transport resources through enhanced visibility and streamlined workflows. |
| Transportation management | LS-TT-02-01 | Implement a system to monitor and predict daily shuttle seat requirements, improving logistical planning. |
| Transportation management | LS-TT-02-02 | Standardise transportation and meal reservations through a streamlined system that supports both NATO staff and course participants. Allow bookings to be made and edited on a weekly basis, with the option to adjust daily reservations up to a defined cutoff time. |

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| Transportation management | LS-TT-02-03 | Include features to track actual usage of reserved shuttle seats and meals, with mechanisms to reduce no-shows and improve service efficiency. |
| Mess Management | LS-MM-01-01 | Digitalise the mess coordination process to automate scheduling, communication, and management, enhancing efficiency and accuracy. |
| Process optimization | NSM-PO-02-01 | Implement a comprehensive change management programme to address resistance and facilitate adoption of digital tools by promoting behavioural change to improve digital communication practices and overall productivity. |
| Process optimization | NSM-PO-02-02 | Provide training and guidance to encourage proper use of systems. |
| Process optimization | NSM-PO-04-01 | Conduct a thorough analysis of the current Final Course Report process to identify inefficiencies and bottlenecks by engaging stakeholders to understand challenges and gather input, pinpointing areas where manual tasks can be minimised or eliminated, and using these insights to redesign the workflow into a more efficient process that provides a solid foundation for subsequent digital automation. |

c. LOT 1A – Work package 3: Capabilities and related requirements

The third work package represents the final phase of the implementation, aimed at completing the to be solution and consolidating the outcomes achieved in the previous phases.

This phase focuses on delivering the remaining functionalities and fine-tuning the overall system to maximize efficiency, usability, and value across the organization.

It will encompass the following key L2 capabilities ensuring full alignment with the intended objectives:

- Systems integration as detailed in the requirements table
- Security and access permission
- Publication management
- Visits management
- Fellowship management
- Asset and inventory
- Travel request
- Onboarding & HR management
- Absence tracking
- Teleworking request

The capabilities are detailed with the requirements listed below

| Capability | # | Requirement description |
|---------------------------------|--------------|---|
| Systems integration | DM-SI-01-06 | Integration with the badging system to streamline and automate the badge assignment process; this could involve RPA functionalities |
| Systems integration | DM-SI-01-07 | Integration with Campaign Monitor to retrieve communication bounces and other issues to update the contact base automatically |
| Systems integration | DM-SI-01-08 | Integration with Manage Engine to manage inventory synchronization and resource allocation within the calendar |
| Systems integration | DM-SI-01-10 | Integration with APMS to automate HR activities; this could involve RPA functionalities |
| Security and access permissions | DM-SAS-01-01 | Implement a digital resource management system with flexible, hierarchical permission controls to enhance security while supporting productivity and reducing administrative burden |
| Security and access permissions | DM-SAS-02-01 | Establish controlled information-sharing protocols that restrict access to course member data based on user roles and responsibilities, ensuring data privacy and compliance with NATO Directives |
| Security and access permissions | DM-SAS-02-02 | Ensure timely and confidential sharing of available pre-arrival information with authorised personnel immediately following shortlist approval, while maintaining strict confidentiality protocols. |
| Security and access permissions | DM-SAS-02-03 | Implement differentiated access controls, according to the least privilege principle, to ensure divisions receive only information relevant to their roles, for example, restricting Carabinieri from accessing biographies while allowing Faculty Advisors access to committee-related data |
| Security and access permissions | DM-SAS-03-01 | Automate the badging process by digitising form submission, data capture, and code assignment to streamline badge issuance and improve efficiency. |
| Security and access permissions | DM-SAS-04-01 | Digitalise the car pass request process to automate data entry, validation, and approval, reducing manual effort and errors. Implement a system allowing advance submission and attachment of required documents (driving license, registration, insurance) to streamline vehicle pass processing ahead of vehicle arrival. |

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| Security and access permissions | DM-SAS-05-01 | Automate the temporary access permit process using Salesforce (SF) to manage requests and lists digitally. |
| Security and access permissions | DM-SAS-05-02 | Provide gatehouse staff with ability to access and update the permit list in real time. |
| Security and access permissions | DM-SAS-05-03 | Implement automated matching of visitor badge numbers to visitors for improved security and efficiency. |
| Publication Management | EL-PM-01-01 | Develop functionality to update the newsletter contact list, ensuring the database remains up to date. |
| Publication Management | EL-PM-01-02 | Implement mechanisms to identify and disable contacts that generate bounce-back emails, preventing delivery issues and maintaining list hygiene. |
| Publication Management | EL-PM-01-03 | Enable the system to send automatic requests to contacts for updating their information, helping to sustain data accuracy and improve engagement rates. |
| Publication Management | EL-PM-02-01 | Create a system that manages the full publication workflow, starting from the initial idea through to final approval and ensure the solution facilitates each stage of the process, including drafting, reviewing, editing, and authorisation. |
| Publication Management | EL-PM-02-02 | Provide a real-time dashboard that offers visibility into the status of all publications, enabling better tracking and management. |
| Visits management | EL-VM-01-01 | Implement a system to track the submission of visit requests through an online platform and design an approval process to streamline decision-making and reduce delays. |
| Visits management | EL-VM-01-02 | Integrate scheduling functionality to coordinate visit dates and times efficiently while enabling notifications and updates to all relevant parties throughout the visit management lifecycle. |
| Visits management | EL-VM-01-03 | Provide real-time tracking and reporting capabilities to enhance transparency and operational efficiency. |
| Visits management | EL-VM-02-01 | Develop a process for VIP management, centralising all relevant information, visits and interactions. |
| Visits management | EL-VM-02-02 | Introduce a RAG (red, amber, green) status system to categorise VIPs based on priority, risk, or engagement level, using these flags to help staff focusing resources |

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| | | and attention where they are most needed, improving overall VIP relationship management. |
| Visits management | EL-VM-02-03 | Configure the system to trigger follow-ups and alerts according to the assigned RAG status, ensuring timely and appropriate management. |
| Fellowship management | EL-FM-01-01 | Deploy a secure digital platform that allows external applicants (guests) to upload required documents seamlessly during the fellowship application process. Design the solution to efficiently process large volumes of applications while upholding stringent security measures and ensuring full compliance with Partner Countries' regulatory restrictions. |
| Fellowship management | EL-FM-01-02 | Consolidate document storage and management into a centralised system to eliminate manual handling and enhance organisational efficiency |
| Fellowship management | EL-FM-02-01 | Develop an integrated fellows data management and analysis platform that automates the consolidation of data and seamlessly connects related document storage for streamlined access and processing |
| Fellowship management | EL-FM-02-02 | Transition from manual Excel-based workflows to a more efficient, automated tool designed to support fellows selection |
| Fellowship management | EL-FM-03-01 | Automate the communication workflow to generate and dispatch fellows nomination and alternate invitation letters promptly upon Dean's approval |
| Fellowship management | EL-FM-03-02 | Implement personalised and segmented email communication capabilities to effectively engage both selected and non-selected candidates with tailored messaging. |
| Fellowship management | EL-FM-03-03 | Utilise a scalable, automated mailing system to bypass recipient number restrictions, ensuring efficient and reliable delivery of communications |
| Fellowship management | EL-FM-04-01 | Automate and optimise the workflow between Fellowship Management and Finance teams to accelerate payment activation and requests approval to achieve a seamless and trackable process, enhancing efficiency and minimising delays |
| Fellowship management | EL-FM-05-01 | Define and implement a transparent process whereby HR oversees and |

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| | | approves leave and travel requests for fellows, ensuring adherence to organisational policies and regulatory compliance. |
| Fellowship management | EL-FM-05-02 | Deploy a system that intelligently routes requests between the Research Division and HR, ensuring proper oversight, control, and accountability throughout the process. |
| Fellowship management | EL-FM-06-01 | Automate the collection and updating of fellows' expertise and related data to populate the SFDC database, reducing manual effort and improving data accuracy and timeliness. |
| Fellowship management | EL-FM-07-01 | Implement a knowledge base and/or chatbot to provide instant, automated responses to common queries about the fellowship program, reducing email volume and improving user experience. |
| Fellowship management | EL-FM-08-01 | Implement alerts and timely notifications to support the entire fellowship process and ensure effective follow-up. |
| Asset and inventory | LS-AI-01-01 | Develop a system to digitalise all aspects of material management, covering order placement, tracking of consumables inbound and outbound, and invoice authorisation. |
| Asset and inventory | LS-AI-01-02 | Consolidate the material management processes within one unified approach to provide seamless workflows and data consistency. |
| Asset and inventory | LS-AI-01-03 | Ensure the system offers real-time visibility into material status and financial authorisations, enhancing oversight and accountability. |
| Asset and inventory | LS-AI-01-04 | Within the material management capability, automate routine tasks and streamline processes to reduce manual effort and minimise errors. |
| Asset and inventory | LS-AI-02-01 | Implement an integrated system to manage material tracking digitally, replacing manual methods. |
| Asset and inventory | LS-AI-02-02 | Incorporate barcode scanning functionality to enable efficient labelling, identification, and inventory management. |
| Asset and inventory | LS-AI-02-03 | Replace existing manual Excel/Access-based processes with automated tools that provide real-time updates and visibility of inventory status. |
| Asset and inventory | LS-AI-03-01 | Implement a digital solution to centralise and improve the management of furniture |

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| | | requests, replacing existing fragmented processes. Include a functionality to verify the age of existing furniture before initiating procurement. |
| Asset and inventory | LS-AI-03-02 | Automate supplier selection by applying cost-based criteria, using simpler procedures for lower-value procurements and more comprehensive evaluations for higher-value requests. |
| Asset and inventory | LS-AI-03-03 | Automate the matching of invoices with deliveries and related purchase orders, including digital invoice approval workflows replacing manual signing. |
| Asset and inventory | LS-AI-03-04 | Track asset details such as serial number, location, and delivery date within the system, with automated label registration and management. |
| Asset and inventory | LS-AI-03-05 | Centralise furniture and assets document storage within the system to improve organisation and reduce reliance on multiple platforms. |
| Asset and inventory | LS-AI-03-06 | Ensure the system provides end-to-end visibility and control over the furniture procurement lifecycle, enhancing accountability and reducing manual effort. |
| Asset and inventory | LS-AI-04-01 | Develop an automated process to generate reconciled quarterly reports tracking material inflows and outflows, integrated with the "foglio di carico" (loading sheet), replacing the manual process to enhance data consistency, accuracy, and operational efficiency. |
| Asset and inventory | LS-AI-05-01 | Streamline the entire write-off and disposal process to enhance operational efficiency, transparency, and audit readiness. Support different write-off methods such as destruction or donation, with flexibility to change the write-off type if another entity requests the equipment. |
| Asset and inventory | LS-AI-05-02 | Implement an electronic signing workflow involving all required signatories: Head of Property & Accounting Section, Head of Logistics, Head of Administration and Write-off Officer (signs after furniture is taken over by the disposal company) |
| Asset and inventory | LS-AI-05-03 | Maintain a detailed, auditable history of all disposals within the system, eliminating the current lack of historical records. |
| Asset and inventory | LS-AI-05-04 | Integrate donation request submissions and approval workflows into the system, |

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| | | replacing the current external process involving Brussels. |
| Asset and inventory | LS-AI-06-01 | Develop a digital platform to track physical items in each room, replacing printed spreadsheets currently posted on doors (Include all consumables and items valued over €300 in the tracking system.) |
| Asset and inventory | LS-AI-06-02 | Ensure each room has its own dedicated digital report accessible to authorised personnel and assign responsibility for supplies in each room to the highest-ranking person present, with appropriate access and management rights in the system. |
| Asset and inventory | LS-AI-06-03 | Enable real-time updates and accurate tracking to improve inventory management and accountability. |
| Asset and inventory | LS-AI-07-01 | Implement a digital solution to streamline and automate the tracking of gifts, replacing manual record-keeping and enable automatic labelling, numbering, and recording of gifts that are kept, ensuring accurate and up-to-date inventory records. |
| Asset and inventory | LS-AI-07-02 | Incorporate approval processes for the disposal or donation of gifts, including committee approvals from Brussels, within the system. |
| Asset and inventory | LS-AI-07-03 | Provide robust reporting and audit trails to improve governance and oversight of the gifting process. |
| Travel request | FB-TR-01-01 | Implement a digital solution to streamline and automate the travel request process currently handled manually by allowing travellers to submit travel requests electronically, incorporating mandatory digital signatures from all required approvers (applicant, supervisor, division head, and additional officials as applicable). |
| Travel request | FB-TR-01-02 | Automate flight ticket sourcing and cost estimation within the system, while allowing applicants to input personal quotations if self-funding. |
| Travel request | FB-TR-01-03 | Implement a seamless approval process culminating in final authorisation by the Head of Fiscal Office via the FinS Travel system. |
| Travel request | FB-TR-01-04 | Incorporate functionality to create collective travel orders where appropriate, improving efficiency. |

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| Travel request | FB-TR-01-05 | Facilitate easy submission and processing of amendments or new requests when travel plans change. |
| Travel request | FB-TR-02-01 | Incorporate car rental approvals and personal vehicle use declarations into the digital Travel Request process. |
| Travel request | FB-TR-02-02 | Enable travellers to submit required justifications electronically, with automated routing through approval workflows. |
| Travel request | FB-TR-02-03 | Calculate reimbursements based on the most economical travel option, comparing personal vehicle costs to alternatives such as flights. |
| Travel request | FB-TR-02-04 | Include digital signing of self-declaration forms for personal vehicle use, distinguishing between personal and official travel purposes. |
| Travel request | FB-TR-03-01 | Implement a digital solution to streamline the submission of travel claims, replacing manual paper-based processes allowing travellers to attach digital copies of receipts and ensure secure, long-term electronic storage compliant with retention policies. |
| Travel request | FB-TR-03-02 | Incorporate an accurate per diem calculator within the travel management process that accounts for arrival/departure times, locations, meal inclusions, and differing policies. |
| Travel request | FB-TR-03-03 | Implement system controls to enforce travel policies, such as per diem eligibility, class of air and train travel, based on user roles (e.g., NATO civilians, military personnel, Commander, A-grade personnel). |
| Travel request | FB-TR-03-04 | Ensure compatibility with BUDFIN's management of flight bookings and advance payments, supporting reimbursement processes for other expenses. |
| Travel request | FB-TR-04-01 | Develop a system that automatically generates reports based on travel request data, replacing the current manual database reporting process to improve efficiency and data reliability. |
| Travel request | FB-TR-04-02 | Ensure seamless integration with existing travel request records to provide up-to-date information and enable real-time querying and reporting capabilities, such as tracking the number of civilians who have travelled within a specific period. |

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| Onboarding & Management | HR | NSM-OHRM-01-01 | Enable new staff to complete required documents electronically, speeding up the onboarding process while simplifying and digitalizing the administrative steps involved in onboarding new personnel at NDC. |
| Onboarding & Management | HR | NSM-OHRM-01-02 | Automate the routing and storage of onboarding documents to relevant departments and systems, allowing related approvals and signatures |
| Onboarding & Management | HR | NSM-OHRM-02-01 | Collect and utilise advance data on staff arrivals to better plan safety training sessions and distribute relevant safety information. |
| Onboarding & Management | HR | NSM-OHRM-02-02 | Manage safety courses and dissemination of emergency plans as part of the onboarding process. |
| Onboarding & Management | HR | NSM-OHRM-02-03 | Create separate onboarding processes to address differing safety requirements for contractors and internal staff |
| Onboarding & Management | HR | NSM-OHRM-03-01 | Integrate an AI-driven pre-screening step within the recruitment process to assess candidate suitability against defined requirements. |
| Absence tracking | | NSM-AT-01-01 | Develop a system to simplify the submission of leave permit requests, enabling users to easily submit their applications. |
| Absence tracking | | NSM-AT-01-02 | Ensure the system efficiently routes leave permit requests for approval to reduce processing time. |
| Absence tracking | | NSM-AT-01-03 | Ensure all leave permits are securely stored with a comprehensive audit trail for tracking and compliance purposes. |
| Absence tracking | | NSM-AT-02-01 | Develop tool to manage and monitor employee absences effectively. |
| Absence tracking | | NSM-AT-02-02 | Link the absence management system with the existing badging system to enabling accurate monitoring of who is on-site at any given time. |
| Teleworking request | | NSM-TR-01-01 | Develop a streamlined digital system for submitting teleworking requests. |
| Teleworking request | | NSM-TR-01-02 | Implement efficient routing and approval processes for teleworking requests to speed up decision-making. |
| Teleworking request | | NSM-TR-01-03 | Ensure all teleworking requests and approvals are securely stored and easily accessible for future reference. |

4.2 LOT 1B: System Administration and Minor Development Support

This deliverable will be conducted by the resources outlined below for which the bidder should provide the costs:

Solution Architect and Administrator Profiles necessary:

1. Solution Architect
 - a. Online
 - b. Hourly rate required
2. Junior Site Administrator & Developer
 - a. In-presence will be required throughout duration of the implementation phase (LOT 1A)
 - b. Hourly rate required

LOT1B will be contracted on a yearly basis throughout the implementation of LOT 1A.

Improvement and consolidation of existing systems in Salesforce

Please note that the below activities should be coordinated with the team implementing LOT1A to avoid technical debt, regression errors and duplication of work.

- Salesforce apps: NDC Events App for Conference of Commandants and Anciens' Conference and Seminar
- Salesforce apps: NDC Courses App for Course Member Registration and Committee Making
- Salesforce apps: Lecturer Management System and Course Planning System
- Salesforce app: Contact Management System
- Salesforce Experience Cloud Site as well as mobile app access
- Single-Sign On (SSO)

An annex describing the above systems will be released to candidates at the Bidder's Conference

4.3 LOT 2: Licenses

As part of the overall solution, a dedicated LOT has been established for the licenses required to support the to-be solution realization. This includes licenses for core software platforms, integration tools, security modules, and specialized applications underpinning key capabilities.

In the table below the list of modules and related number of licenses needed.

| SKU / Product | Estimated Future Quantity | Requirement Summary |
|---|---------------------------|---|
| Education Cloud — Enterprise Edition | 32 | Core platform for all staff managing courses, applications, travel & helpdesk |
| Education Cloud Limited Staff Access — Enterprise Edition | 45 | Read/limited access for faculty advisors & portal-adjacent staff |
| 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 |
| Sandbox (Full Copy) — Enterprise Edition | 1 | Full production replica for UAT, regression testing & safe migration |
| Knowledge — Enterprise Edition | 5 | Structured knowledge base for helpdesk agents & portal self-service |
| Tableau Cloud Creator (existing — maintain) | 5 | Maintain existing Tableau Creator licenses for operational reporting & KPI dashboards(RFP LOT 2 baseline) |
| Tableau Cloud Explorer | 3 | Explorer licenses for intermediate report consumers(RFP LOT 2 baseline) |
| Tableau Cloud Viewer | 50 | Viewer licenses for read-only dashboard access across NDC staff(RFP LOT 2 baseline) |
| Premier Success Plan — Salesforce Platform — Enterprise Edition | 1 | 24/7 support during go-live & hypercare phases across all WPs |
| Signature Success — Salesforce Platform — Enterprise Edition | 1 | Dedicated CSM, proactive health checks & 15-min critical response SLA |
| Privacy Center — Enterprise Edition | 1 | Data retention policies & Right to be Forgotten for GDPR/NATO compliance |
| Previously: Digital Engagement — Enterprise Edition / now: Agentforce Contact Center Digital - Enterprise Edition | 5 | Omni-channel messaging (chat, SMS, WhatsApp) for course members |
| Survey Response Pack (1,000) | 1 | Survey Feedback |
| Asset Scheduling — Enterprise Edition | | Room, equipment & faculty scheduling on the Rome campus |
| Agentforce for Education Add-on — Enterprise Edition | 32 | AI agents for helpdesk, admissions & staff support with real-time translation. |
| Flex Credits (100k) — Enterprise Edition | 2 | Consumption credits for external-facing Agentforce portal interactions. |
| Data 360 on Flex for Agentforce Add-On — Enterprise Edition | 500 | Unified course member profiles from all data sources to ground AI agents. Previously known as Data Services Card. |
| MuleSoft Automation Starter | 5 | RPA & IDP capabilities for badging automation, FinS financial integration & APMS HR integration |

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| MuleSoft Anypoint Platform — Enterprise Edition | 1 | API-led connectivity for Moodle & Publication System integrations only |
| MuleSoft Automation Starter | 1 | RPA & IDP capabilities for badging automation, FinS financial integration & APMS HR integration |
| Salesforce Shield — Enterprise Edition | 1 | Encryption, audit trail & event monitoring for NATO accreditation compliance |
| Tableau Embedded Analytics | 5 | Embed live Tableau dashboards inside the Course Member & Academic portals |
| Tableau Next Creator | | Salesforce-native AI analytics with education pre-built dashboards & NL querying |
| Mobile Publisher for Employees and Members — Enterprise Edition | 77 | Branded native iOS/Android app for staff & course members |
| Mobile Publisher for Logins (Per Month) — Enterprise Edition | 2000 | Mobile app access for login-licensed external users (applicants, alumni) |
| Service Cloud Voice — Enterprise Edition | 5 | Telephony integrated into Salesforce with auto-logging & AI transcription |
| Feedback Management — Starter — Enterprise Edition | 1 | Native survey tool for post-course & lifecycle feedback collection |
| Marketing Cloud Growth | 1 | Full marketing automation for campaigns, newsletters & alumni outreach — native Salesforce integration; replaces Campaign Monitor for marketing use cases |

The bidder should provide the quotation to cover the NDC’s licenses needs from 2027 to 2030 based on the list above. The license types and quantities listed above are indicative and do not constitute a binding commitment.

5. Project approach

The NDC digital transformation project is articulated in three main phases correspondent to the three work packages composing LOT 1 described above.

Each phase must be structured through **dedicated project core activities – analysis, implementation, testing, and deploy** – each representing a critical step in ensuring the overall success of the initiative.

The entire project must be supported by a **robust governance framework**, which ensures coordinated management, strategic oversight, and adherence to timelines and objectives. **Complementing** these core phases are **data migration activities**, necessary for the transfer of data and processes, and **change management** efforts, which guide users through the adoption of new operational methods, ensuring continuity and acceptance of change throughout the organization. In addition to this,

risk and compliance monitoring must be implemented to ensure adherence to regulatory requirements and to proactively manage potential risks.

5.1 Project core activities

Modern digital transformation initiatives require a structured yet flexible approach that balances agility with governance, ensuring successful delivery of complex digital solutions. This framework provides a comprehensive methodology for managing digital projects through four interconnected phases: analysis, development, testing, and deploy. A structured governance oversees all phases of the project to ensure its successful execution and the achievement of the defined objectives.

5.1.1. Analysis

The Analysis Phase is the critical foundational stage where the strategic intent for the digital solution is established through a detailed and actionable understanding of the business needs, clear definition of scope, and articulation of the desired user experience. This phase requires comprehensive and iterative engagement with key stakeholders across the organisation to ensure all perspectives are captured, validated, and aligned.

Key activities and requirements include:

- **Stakeholder Engagement & Requirements Gathering**
 - Analyse the available documentation about current and target state
 - Define a structured approach to ensure a full involvement of NDC minimizing the impact on the NDC organization
 - Define functional document detailing requirements to design the solution.
- **Technical Feasibility & Architecture Analysis:**
 - Engage expert NDC technical architects to assess compatibility with existing legacy systems and infrastructure.
 - Identify technical constraints, integration requirements, and potential risks that may impact solution design.
 - Propose mitigation strategies for identified technical risks and estimate resource and timeline requirements for implementation.
- **Comprehensive Documentation:**
 - Produce detailed, structured documentation capturing all analysis outputs, including functional detailed requirements analysis, technical feasibility and detailed solution.
 - Maintain up-to-date deliverables across the different work packages, build an exhaustive and complete project documentation and support the knowledge transfer throughout the project lifecycle.
 - Ensure documentation provides a solid foundation for the subsequent design and development phases.

5.1.2 Development

The Development Phase is dedicated to transform the conceptual designs and business requirements defined during the Analysis Phase into a robust, fully functional

Salesforce digital solution. The selected bidder is required to adopt agile methodologies, leveraging iterative and incremental development cycles (sprints) to deliver value early and often. This approach ensures continuous alignment with evolving business needs and stakeholder expectations.

Key activities and requirements include:

- **Iterative Development:**
 - Plan and execute development in short, time-boxed sprints conducting periodical demos to maintain NDC stakeholders up to date about the implementation progresses
 - Conduct daily stand-ups to monitor progress, address blockers, and foster team collaboration
- **Adherence to Standards & Best Practices:**
 - Apply Salesforce development best practices, including the use of, Lightning Components, Flows, and declarative tools, preferring standard out-of-the-box low-code no-code approach vs customization.
 - Enforce coding standards, naming conventions, and architectural guidelines to ensure code consistency and maintainability.
- **Integration & Interoperability:**
 - Design and implement integrations with external systems using Salesforce APIs and standard protocols (REST should be used when support is available).
 - Ensure integrations are robust, scalable, and support error handling and monitoring.
 - Maintain clear interface contracts and versioning for all integration points.
- **Comprehensive Documentation:**
 - Document all implementations, including technical design documents, data dictionaries, and development details
 - Maintain up-to-date documentation across the 3 work packages to support knowledge transfer and future maintenance.
- **Integration Documentation:**
 - Use standard documentation frameworks such as Open API / Swagger for all integrations.
 - Provide detailed descriptions of supported methods, request/response schemas, field definitions, authentication mechanisms, sample payloads, and response codes.
 - Include versioning information and change logs for all integration interfaces.
- **Code Quality & Governance:**
 - Enforce code review processes for all development work, ensuring adherence to standards and early detection of defects.
 - Perform static code analysis using automated tools to identify code smells, security vulnerabilities, and maintainability issues.

- Generate and share periodic code quality reports including mitigation actions.
- **Version Control & Release Management:**
 - Utilize robust versioning tools to manage source code, track changes, and facilitate collaboration.
 - Implement branching strategies to support parallel development, feature isolation, and controlled releases.

5.1.3 Testing

The Testing Phase is a continuous and fully integrated process embedded throughout the entire development lifecycle, rather than being treated as a separate, final step.

Key activities and requirements include:

- **Defining a test strategy:** ensure that all functional and non-functional requirements of the project are thoroughly validated, and potential defects are identified and resolved before deployment. The activities to be managed are described below.
 - Identify Test Scenarios and Test Cases
 - Analyse system requirements and business processes to define relevant test scenarios.
 - Ensure coverage of functional, non-functional, security, and compliance aspects.
 - Plan the Test Case Design Phase
 - Establish objectives, scope, and priorities for test case development.
 - Define responsibilities, timelines, and resources required for test design.
 - Design Test Cases/Scripts
 - Develop detailed test cases and automated or manual test scripts.
 - Include expected results, prerequisites, and acceptance criteria for each case.
 - Configure the Test Environment
 - Set up software, network, and security configurations required for testing.
 - Ensure the environment mirrors the production system as closely as possible.
 - Identify and Populate Test Data
 - Define data requirements for each test scenario.
 - Generate or acquire appropriate test data while ensuring data privacy and compliance.
 - Develop Test Scenarios
 - Translate requirements into executable test scenarios.
 - Prioritize scenarios based on risk, criticality, and business impact.
 - Plan the Test Execution Phase
 - Prepare a detailed schedule and sequence for executing tests.

- Allocate resources and define reporting mechanisms for test results.
 - Conduct Test Plan Review
 - Review the test plan with stakeholders for completeness and accuracy.
 - Incorporate feedback and ensure alignment with project objectives and compliance standards.
- **Test execution** encompasses the practical implementation of these plans, including running tests, documenting outcomes, identifying defects, and performing retests to validate fixes.
 - Execute Test Cases
 - Run the predefined manual or automated test cases according to the test plan.
 - Follow the defined sequence and adhere to test conditions and prerequisites.
 - Document Test Results
 - Record actual outcomes of each test case.
 - Capture screenshots, logs, or other evidence as required.
 - Identify and Report Defects
 - Log any deviations from expected results as defects.
 - Classify and prioritize defects based on severity and impact.
 - Perform Retesting
 - Verify that reported defects have been fixed.
 - Execute regression tests to ensure fixes do not introduce new issues.
 - Track and Monitor Test Progress
 - Monitor execution status against the test plan schedule.
 - Update dashboards or reports for stakeholders.
 - Provide Feedback and Review
 - Share observations and lessons learned during execution.
 - Recommend improvements for processes, test cases, or system configuration.
- **Support during UAT testing** involves providing ongoing assistance to promptly address issues, closely track test progress, and continuously observe system behavior to maintain quality, stability, and performance throughout the process. The activities to be managed are described below
 - Assist testers during UAT
 - Provide guidance on executing test cases.
 - Clarify questions regarding test scenarios and expected results.
 - Monitor test progress
 - Track completion status of test cases.
 - Ensure adherence to the test schedule.
 - Identify and resolve issues
 - Log any problems or deviations from expected results.
 - Coordinate with development or technical teams to implement fixes.
 - Observe system behavior
 - Continuously monitor system performance, stability, and responsiveness during UAT.

- Report anomalies or performance degradation immediately.
- Provide ongoing feedback
 - Update stakeholders on UAT progress and any critical issues.
 - Suggest adjustments or improvements to test scenarios if needed.

5.1.4 Deployment

The Deployment aspect marks the culmination of the project lifecycle, where the thoroughly tested and validated digital solution is transitioned into the production environment. The selected bidder is responsible for executing all deployment activities with precision, ensuring minimal disruption to business operations and maintaining the highest standards of security, traceability, and quality.

Main phases and activities:

- **Deployment Finalization:**
 - Final Code Freeze & Configuration Sign-off: Lock down all code and configuration changes, obtaining formal approval from relevant stakeholders.
 - Data Validation & Integrity Checks: Perform comprehensive data quality and integrity assessments to confirm readiness for production use.
 - Execute automated test suites and static code analysis to identify and remediate any outstanding issues.
- **Deployment Readiness:**
 - Prepare all environments following defined promotion paths and environment-specific configurations.
 - Develop and consolidate detailed deployment and rollback plans, including step-by-step procedures and contingency measures.
 - Prepare a comprehensive deployment playbook and stakeholder communication plan to ensure all parties are informed and aligned.
- **Deployment Methodology**
 - Leverage Salesforce-native tools integrated with version control systems and CI/CD platforms to enable traceable, controlled, and secure deployments.
 - Plan and document all the necessary pre- and post-deployment manual procedures to address configuration or data changes that require human intervention.
- **Deployment Execution**
 - Execute pre-deployment manual procedures to prepare the target environment, including configuration adjustments, access provisioning, and data backups.
 - Promote metadata and configuration changes using automated scripts or Salesforce native tools, ensuring consistency and repeatability.
 - Run CI/CD release jobs with built-in rollback and detailed logging capabilities to support auditability and rapid issue resolution.

- Complete post-deployment manual procedures to finalize any remaining activities, such as activating features, updating user permissions, or performing final data loads.
- **Post-Go Live & Hypercare:**
 - Monitor post-launch system performance, stability, and user experience through a dedicated Hypercare phase.
 - Rapidly address any incidents, defects, or user feedback, ensuring business continuity and user satisfaction.
 - Provide knowledge transfer and support documentation to enable smooth transition to ongoing operations and support teams.

This structured and comprehensive deployment approach, will ensure a secure, reliable, and business-aligned transition to production, supporting organizational objectives and maximizing the value of the digital solution.

5.1.5 Governance

The Governance Framework is a critical, embedded component of the project lifecycle, designed to ensure that all activities remain aligned with strategic objectives while enabling effective oversight, risk management, and continuous improvement. Rather than functioning as a separate or isolated control layer, governance must be fully integrated into every phase of the project to support transparency, accountability, and agility throughout the digital transformation journey.

Key activities and requirements include:

- **Integrated Governance & Oversight:**
 - Establish governance processes that are embedded within all project phases, ensuring seamless coordination between planning, analysis, design, development, testing, and deployment activities.
 - Promote a culture of shared responsibility where governance supports decision-making without becoming a bottleneck.
 - Define clear roles and responsibilities for project stakeholders, including project sponsors, and delivery teams.
- **Strategic Alignment & Performance Monitoring:**
 - Continuously monitor project progress against strategic goals and objectives to ensure the solution delivers intended business value.
 - Implement regular project status reporting mechanisms that provide timely, accurate, and actionable insights to all stakeholders.
 - Track key performance indicators (KPIs), milestones, and deliverables to measure progress and identify deviations early.
- **Risk Management & Issue Resolution:**
 - Proactively identify, assess, and manage risks throughout the project lifecycle using structured risk management frameworks.
 - Establish clear escalation paths and resolution protocols to address issues promptly and minimise impact on project delivery.
- **Quality Assurance & Compliance Oversight:**

- Integrate quality assurance into governance processes to ensure deliverables meet defined standards and requirements.
- Conduct regular reviews and audits to verify adherence to project methodologies, regulatory requirements, and organisational policies.
- Monitor compliance with contractual obligations, security standards, and data protection regulations.
- **Stakeholder Communication & Engagement:**
 - Develop and maintain a stakeholder communication plan that ensures consistent, transparent, and two-way communication throughout the project.
 - Facilitate regular governance meetings, including status reviews, to keep stakeholders informed and engaged.
 - Use communication tools and channels that support collaboration and timely information sharing.
- **Agility & Flexibility in Governance:**
 - Design governance practices that provide sufficient structure and control while allowing flexibility to adapt to changing project needs and emerging challenges.
 - Encourage iterative feedback loops and continuous improvement to refine governance processes as the project evolves.
 - Balance rigorous oversight with the need for rapid decision-making and responsiveness inherent in successful digital transformation initiatives.

5.2 Data Migration

Data migration is a critical pillar of the digital transformation programme, enabling the consolidation of information and the establishment of a single source of truth for the organization. Currently, data resides in multiple heterogeneous sources, spanning both structured formats (such as Excel spreadsheets and Access databases) and unstructured archives (such as Word documents and other file types). To achieve a centralized, reliable data repository, it is essential to implement a robust, systematic, and well-governed data migration strategy.

Data migration phases and related activities:

- **Data Assessment & Planning:**
 - Conduct a thorough inventory and assessment of all existing data sources, identifying data owners, formats, volumes, and quality levels.
 - Define clear data migration objectives, success criteria, and timelines in alignment with business goals.
 - Develop a detailed migration plan, including risk assessment, resource allocation, and contingency measures.
- **Data Extraction:**
 - Utilize appropriate extraction techniques and tools to efficiently retrieve data from all identified sources, regardless of format or location.
 - Ensure secure handling of sensitive data during extraction, adhering to data privacy and compliance requirements.

- **Data Transformation & Preparation:**
 - Normalize data to ensure consistency in structure, format, and terminology across all datasets.
 - Map source data fields to target repository structures, documenting all transformation rules and logic.
- **Data Loading & Migration Execution:**
 - Import the transformed data into the centralized repository using reliable and scalable migration tools and techniques.
 - Implement data validation checks during and after loading to ensure completeness, accuracy, and integrity.
 - Address issues related to missing, incomplete, or poor-quality data through automated rules and manual review as needed.
- **Testing & Quality Assurance:**
 - Conduct rigorous data reconciliation and validation to confirm that migrated data matches source data and meets business requirements.
 - Perform user acceptance testing (UAT) with key stakeholders to verify process compliance within migrated data.
 - Document all test cases, results, and any remediation actions taken.

The data migration process must ensure the successful consolidation of information, improved data quality, and the creation of a reliable, centralized data repository that supports the organization's digital transformation objectives.

5.3 Change Management

The Change Management approach is a vital enabler of success within NDC's digital transformation initiative, ensuring that new processes, technologies, and ways of working are effectively adopted across the organisation. The bidder is responsible for delivering a comprehensive change management strategy that supports business readiness throughout the entire transformation lifecycle, fosters active stakeholder engagement, and drives sustainable behavioural change.

Key activities and requirements include:

- **Stakeholder Engagement & Support:**
 - Conduct structured and ongoing stakeholder engagement activities to understand concerns, expectations, and readiness levels across all impacted groups.
 - Facilitate targeted change interventions designed to promote correct usage of new systems and processes, addressing resistance and reinforcing positive behaviours.
 - Establish dedicated support channels and resources to provide timely assistance and guidance during the transition period.
- **Training Programmes & Capability Building:**
 - Design and deliver comprehensive training programmes that clearly explain new processes, system functionalities, and roles to all affected users.

- Establish continuous feedback mechanisms to capture learner experiences, identify gaps, and refine training content and delivery accordingly.
 - Deliver training sessions by qualified trainers using engaging, interactive techniques that promote active participation and practical understanding. Schedule sessions to accommodate different user groups and minimise disruption to daily operations.
 - Develop high-quality training materials such as manuals and quick reference guides, that support learning before, during, and after training sessions. Ensure materials are regularly updated to reflect system changes and user feedback.
- **Business Readiness & Adoption Monitoring:**
 - Assess organisational readiness at key milestones to ensure that people, processes, and technology are prepared for change.
 - Implement adoption metrics and monitoring tools to track progress, identify areas requiring additional focus, and measure the impact of change initiatives.
 - Collaborate with business leaders and change champions to reinforce adoption and embed new ways of working into the organisational culture.

Throughout the transformation lifecycle, lessons are continuously learned and used to dynamically adjust change management activities in response to evolving business needs and stakeholder feedback. This approach supports the transition from project-driven change to ongoing operational excellence by embedding change capabilities within the organisation.

5.4 Risk and Compliance

Risk and compliance management represent a critical component of the project's overall success, integrity and long-term sustainability. The bidder shall adopt and deliver a comprehensive security-by-design approach, from the initial launch of the project and maintained consistently throughout all phases of the project lifecycle. This approach must ensure that security considerations are systematically integrated into every stage of development and implementation, thereby minimising vulnerabilities and enhancing resilience.

The bidder shall have in-depth knowledge of NATO Security Accreditation Process and specific NATO Security Directives to ensure that security principles are embedded into the project phases and are clearly reflected in the relevant policies, procedures and operational guidelines. The bidder shall demonstrate expertise and familiarity with each phase of accreditation process, including conducting thorough assessments, verifying compliance with technical and regulatory requirements, and obtaining final accreditation results supported by comprehensive and well-documented reports.

In particular, the bidder shall possess proficient awareness and expertise in two key areas. The first area concerns the security of web applications, according to NATO Directives as well as relevant international regulations and standards. The bidder shall demonstrate the ability to conduct detailed assessments and support the establishment of the required security controls, based on threat analysis and impact evaluations. This knowledge is essential to effectively support the NATO Security

Accreditation Process, ensuring that all security requirements are met and maintained throughout the project lifecycle.

The second critical area relates to the security of public cloud-based environments, with a particular focus on the technical and implementation aspects of information protection. The bidder shall exhibit a thorough understanding of cloud security architectures, data protection mechanisms, and compliance obligations specific to public cloud-based environments.

The bidder shall assume responsibility for the continuous monitoring, evaluation and updating of risk and compliance considerations throughout the development of NDC target-state digital infrastructure.

The bidder shall ensure a continuous security oversight throughout the development, testing and deployment stages of the project by planning, executing and reporting the compliance status of NDC target-state digital infrastructure periodically. This will equip NDC stakeholders with a comprehensive understanding of the security-related matters of the project allowing them to take informed decisions.

This ongoing vigilance shall address emerging threats, evolving regulatory requirements, and technological advancements, thereby safeguarding the project's assets, data integrity and operational continuity. The bidder shall demonstrate expertise in managing security risks and compliance requirements across NATO environments, delivering clear and actionable documentation, and facilitating successful accreditation outcomes.

The bidder shall support the drafting of the security accreditation documentation.

6. Project timeline

The structure of the LOT 1 must be reflected in the project timeline that should span **no more than twenty months** (in terms of working days). Per each work package the Gantt should present the activities needed and the related duration.

NDC reserves the right to kick off the first work package after the bid assignment. For the work packages 2 and 3 the starting date will be defined based on the NDC's needs and resources.

7. Administrative instructions

The following paragraph provides detailed information on the guidelines for bid submission, compliance requirements, communication protocols, and selection criteria.

7.1 Structure of Lots and Terms of Activation

Based on the bid structure the bidders can submit for:

- LOT 1, encompassing all three work packages in Lot 1A, and ongoing system administration and development support in Lot 1B. Please note that LOT1A and LOT1B will therefore be awarded to a single bidder.
- LOT 2, encompassing all licenses needed
- Both LOT 1 and LOT 2

Before signing the contract, the NDC may revise and integrate the Technical Requirements to include any superior technical, functional, or performance features contained in the winning bidder's proposal, where such integration is considered to be in the best interest of the NDC.

NDC will award the entire LOT 1, while reserving the right to activate the three work packages based on its needs and available resources. However, NDC is obliged to order only its actual requirements. Therefore, the signature of the contract will not engender a financial liability for the NDC. The latter is engendered only by the release of individual orders subject to availability of funds.

The implementation team shall include at least two technical resources with a valid NATO PSC clearance. Only these professionals will be permitted to access the NDC production environments. Should the PSC Certificate be not yet available, proof that the PSC request has been initiated with the competent authority must be produced.

7.2 Compliance criteria

Given the project's importance, complexity, and the nature of the data involved, the following compliance criteria will be applied to assess each bidder's eligibility for participation in the tender. All criteria listed below are considered mandatory.

- The Project must be executed at the NDC offices in Rome, requiring below profiles to be present on site. All travel-related costs shall be the responsibility of the bidder. A development team shall be available on site at least for 30% of the project.
- The team composition must ensure a high level of experience and competencies being aligned with the following requests:
 - The team must involve at least the following senior resources, we expect the full team to be comprised of more staff as deemed necessary by the bidder:

| Profile | Involvement |
|--------------------------------|-------------|
| Project manager | 100% |
| Solution Architect | 100% |
| Technical Lead | 100% |
| Functional Specialist | 100% |
| Compliance and Risk Specialist | 50% |
| Migration specialist | 30% |

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| Change Specialist | 30% |
| Test Manager | 30% |

- The resumes related to the listed profiles must be detailed in the “PROFESSIONAL PROFILES” section (see RFP Bid Template section for reference). The resources indicated must be part of the project team in case of award. The team composition is considered to be binding and any change shall be submitted for evaluation before contract award.
- All resources, including the development team, must be based in NATO countries.
- The Compliance and Risk team that will support the Security Accreditation process must have professional certifications for each of the three areas below:
 - One Governance cybersecurity certification (i.e. CISSP, CISM, ISO 27001)
 - One application security certification (i.e. GWAPT or WAHS)
 - One cloud security certification (i.e. SA STAR LA, CompTIA Cloud+, CCSA)
- The bidder must accept the full scope as described in this document, with no possibility of decoupling or excluding any part of it
- The bidder must demonstrate at least the Global Strategic or Platinum partnership level with Salesforce.
- The bidder must demonstrate knowledge of the context through the presentation of 3 projects with NATO or its subsidiaries or Higher education projects, including at least one integrating Salesforce, and must highlight relevant security and compliance experience. The projects can be described in the “EXPERIENCE AND EXPERTISE” section (see RFP Bid Template section for reference).

7.3 Selection criteria

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| Project scope | <p><i>In a specific section of the Technical Project the bidder must demonstrate a thorough understanding of the project's overall purpose, its objectives, and the functional scope associated with each of the individual work packages.</i></p> <p>0 — Non-compliant <i>No demonstration of understanding of the project scope, or response is generic boilerplate with no reference to the work packages, objectives, or functional requirements outlined in the tender. Excluded from further evaluation.</i></p> <p>1 — Inadequate <i>The bidder acknowledges the project exists but demonstrates only superficial awareness of its purpose. Objectives are mentioned in passing without meaningful engagement. Work packages are listed but not addressed in terms of their functional scope. Response gives the evaluator no confidence that the bidder understands what they are being asked to deliver.</i></p> <p>2 — Partial <i>The bidder demonstrates a basic understanding of the project's purpose and some of the objectives, but coverage across work packages is uneven. Some functional scope is described accurately; other areas are missed or misrepresented. The response restates tender content without demonstrating independent comprehension of the complexity or interdependencies involved.</i></p> <p>3 — Meets Expectations <i>The bidder demonstrates a clear and accurate understanding of the project's overall purpose and objectives, with coherent coverage of the functional scope for each work package. All work packages are addressed with sufficient depth to confirm comprehension. The response is accurate and credible, though it largely restates the tender rather than demonstrating analytical insight into scope complexity or risk.</i></p> <p>4 — Good <i>The bidder demonstrates a thorough understanding of the project scope, with explicit linkage between objectives and the functional requirements of each work package. Interdependencies between work packages are acknowledged. The response goes beyond restatement — the bidder shows they have interrogated the scope and identified considerations or constraints that are implicit rather than stated in the tender.</i></p> <p>5 — Exceptional <i>The bidder demonstrates a sophisticated and comprehensive understanding of the project scope at both strategic and operational level. Strategic objectives are precisely connected to functional requirements across all work packages, with commentary on risks, dependencies, and constraints inherent in the scope. The bidder surfaces insights that demonstrate genuine analytical depth — giving the evaluator high confidence that the bidder fully understands what they are committing to deliver, including what has not been explicitly stated.</i></p> |
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| <p>Proposed solution & technical assumptions</p> | <p><i>In a specific section of the Technical Project the bidder must provide a detailed description of the proposed technical solution for each work package, including but not limited to the technologies, implemented Salesforce modules, data model, and any relevant considerations and assumptions.</i></p> <p>0 — Non-compliant <i>No technical solution described, or response is entirely generic with no reference to the specific work packages, Salesforce modules, or implementation context of this procurement. Excluded from further evaluation.</i></p> <p>1 — Inadequate <i>Technologies or modules are named but without justification or connection to the work packages. No data model described. Technical assumptions are absent or trivially generic. The response does not give the evaluator — technical or non-technical — any basis for assessing whether the proposed solution is appropriate or viable.</i></p> <p>2 — Partial <i>A technical solution is described at a high level for some but not all work packages. Technologies and modules are named with limited justification. Data model is referenced but not described with sufficient detail to evaluate design intent. Technical assumptions are present but broad or incomplete — the bidder has not clearly distinguished between what they know and what they are assuming. Material gaps remain that would require significant clarification.</i></p> <p>3 — Meets Expectations <i>A coherent technical solution is described for each work package, with named Salesforce modules and technologies justified against the requirements. The data model is outlined with sufficient clarity to understand the proposed approach, including key objects and relationships. Technical assumptions are documented and reasonable, covering areas such as integration dependencies, data volumes, org configuration, and third-party systems. The solution is plausible and internally consistent.</i></p> <p>4 — Good <i>A well-reasoned technical solution is provided for each work package, with explicit justification for technology and module selection against the strategic objectives and functional requirements. The data model is described with meaningful precision — object relationships, custom vs. standard usage, and scalability considerations are addressed. Technical assumptions are comprehensive and explicitly linked to risks or dependencies. The response demonstrates familiarity with Salesforce best practice, including declarative-first approach, integration patterns, and platform governance.</i></p> <p>5 — Exceptional <i>A detailed, rigorous technical solution is provided for each work package, demonstrating command of Salesforce architecture and the Well-Architected principles (Trusted, Easy, Adaptable). The data model is described with sufficient precision for a technically literate evaluator to assess design quality and long-term viability. Technical assumptions are exhaustive, clearly stated, and tied to specific risk mitigations. The bidder has proactively identified implementation challenges specific to this scope and proposed solutions. A technically literate evaluator would have high confidence in the solution's viability, scalability, and fitness for purpose.</i></p> |
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| Project approach and project plan | <p><i>In a specific section of the Technical Project the bidder must describe the approach and deliverables they will adopt for managing each of the core delivery activities: analysis, development, testing, and deployment. In addition, a defined approach and proposed deliverables must be provided for governance, data migration, change management, and compliance and risk. The proposed approach must explicitly address the objectives outlined in the relevant section of the tender. This will focus on how each workstream is structured, sequenced, and governed within the overall delivery lifecycle — including ownership, methodology, and key deliverables. The bidder must also present a comprehensive delivery plan with a maximum duration of 20 months (expressed in working days), encompassing all three work packages and their associated capabilities, and fully mapping to each of the activities detailed in the project approach.</i></p> <p>0 — Non-compliant <i>No project approach or plan provided, or response is generic boilerplate unadapted to this scope. A bidder naming a methodology without substantive content, or providing a plan that exceeds 20 months, does not cover all three work packages, or cannot be mapped to the approach described, scores 0. Excluded from further evaluation.</i></p> <p>1 — Inadequate <i>An approach is described for some but not all required activity areas, and the plan is skeletal — activities are listed without sequencing, dependencies, or resource allocation. Deliverables are absent or trivially generic. The approach demonstrates no tailoring to the specific scope or Salesforce implementation context. The plan bears no credible relationship to the approach described and could not be used as a basis for delivery governance. Core delivery activities and cross-cutting workstreams are conflated or addressed interchangeably with no clear structure.</i></p> <p>2 — Partial <i>An approach is described for most required activity areas but with uneven depth and material gaps — core delivery activities are addressed more fully than governance, data migration, change management, or compliance and risk, which are treated superficially or deferred. Deliverables are indicated but not defined with sufficient precision. A plan is provided within the 20-month constraint but coverage across all three work packages is uneven, dependencies between work packages are unclear, and key milestones are either absent or insufficiently defined. The plan and approach are loosely connected but an evaluator could not use either to hold the bidder to account during delivery.</i></p> <p>3 — Meets Expectations <i>A credible approach is described for all required activity areas — analysis, development, testing, deployment, governance, data migration, change management, and compliance and risk — with named deliverables for each. Core delivery activities are coherent and Salesforce-appropriate: sprint-based configuration, sandbox and environment strategy, and deployment approach are addressed. Governance covers decision rights, change control, and escalation at project level. Data migration, change management, and compliance and risk are treated as distinct workstreams with defined ownership. A coherent plan is provided within the 20-month constraint, covering all three work packages with logical sequencing, key milestones, and traceable linkage to the approach. Resource allocation is indicated at a sufficient level to understand delivery capacity. Competent but largely follows the bidder's standard template with limited tailoring to this specific scope.</i></p> <p>4 — Good</p> |
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A well-structured approach is provided for every required activity area with explicit deliverables and clear linkage to the tender objectives. Core delivery activities demonstrate Salesforce delivery literacy — ALM, environment pipeline, release management, and cutover planning are addressed with specificity. Governance covers decision rights, change control, and escalation at both project and programme level. Data migration is approached with a defined methodology. Change management is treated as a delivery-critical workstream with dedicated resourcing. Compliance and risk are proactively identified and specifically linked to this implementation context. The plan is detailed, covers all three work packages with explicit dependencies mapped within and between them, milestones have defined entry and exit criteria, resource allocation is specified by role and phase, and the plan accounts for governance gates, data migration windows, testing cycles, and Salesforce release calendar constraints. The approach and plan are fully consistent with each other — an evaluator could use both together as a contract governance baseline.

5 — Exceptional

A comprehensive, fully integrated approach is provided for every required activity area, with complete traceability between activities, deliverables, roles, governance checkpoints, and the plan. Every element is explicitly linked to the tender objectives. The approach demonstrates sophisticated command of Salesforce implementation best practice across all dimensions — governance, compliance, and risk are embedded throughout the delivery lifecycle rather than treated as standalone activities. The plan is granular, fully covers all three work packages and every activity in the approach, maps all dependencies including external ones, and explicitly accounts for Salesforce release calendar constraints, governance checkpoints, data migration phasing, and UAT cycles. Assumptions underpinning the timeline are fully articulated and risk-linked. The approach and plan operate as a single integrated document — every element of the approach is reflected in the plan, and every line of the plan traces back to the approach. Evidence of this approach and planning methodology having been applied at comparable scale — through references, case examples, or sample artefacts — is provided. A score of 5 should be rare and reserved for responses that give a mixed-panel evaluator complete confidence in both the how and the when of delivery.

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| <p>Support strategies</p> | <p><i>In a specific section of the Technical Project the bidder must present a comprehensive strategy covering five key workstreams: data migration, testing, training, change management, and post-go-live hyper-care support. The strategy must demonstrate how each workstream will be resourced, delivered, and governed, with defined deliverables and explicit linkage to go-live milestones. The bidder must also demonstrate how compliance and risk are managed across the support lifecycle.</i></p> <p>0 — Non-compliant</p> <p><i>No support strategy provided, or response fails to address one or more of the five required workstreams. Generic responses with no reference to Lot 1A or the specific implementation context are excluded from further evaluation.</i></p> <p>1 — Inadequate</p> <p><i>All workstreams are acknowledged but treated as a checklist rather than a strategy. No methodology, deliverables, resourcing, or governance is described for any of them. The response gives the evaluator no basis for assessing whether the bidder can deliver any of the five areas competently. Post-go-live hyper-care is either absent or reduced to a single sentence with no definition of duration, scope, staffing, or service levels.</i></p> <p>2 — Partial</p> <p><i>Coverage across all workstreams is uneven — one or more is either absent or superficial. Where workstreams are addressed, they lack specificity: migration without a validation approach; testing without defined types or entry/exit criteria; training without audience segmentation; change management without a structured model or stakeholder engagement plan. Deliverables are vague and the connection to go-live milestones is absent. Post-go-live hyper-care is mentioned but undefined — no duration, no service levels, no staffing model, no transition criteria to business-as-usual.</i></p> <p>3 — Meets Expectations</p> <p><i>All workstreams are addressed with sufficient detail to evaluate the bidder's intent. Migration covers data discovery, mapping, cleansing, validation, and cutover with acknowledged risks. Testing covers types of testing, responsibilities, defect management, and entry/exit criteria. Training addresses audience groups, delivery format, and timing relative to go-live. Change management includes a stakeholder engagement and communications plan. Each workstream has defined deliverables. The response is competent but may follow a standard template with limited tailoring to the specific organisational context. Post-go-live hyper-care defines a structured limited-duration support period with basic service levels, named responsibilities, an issue triage model, and a defined transition point to business-as-usual steady-state support.</i></p> <p>4 — Good</p> <p><i>All workstreams are addressed with depth and explicit linkage to the project plan and go-live milestones. Migration includes a phased methodology with mock migration runs and a cutover playbook. Testing is treated as a quality assurance discipline throughout delivery, not just a phase-end activity, with Salesforce-specific considerations addressed. Training is designed around defined user personas and adoption outcomes, with a post-go-live reinforcement approach. Change management is structured around a recognised methodology, with stakeholder analysis, impact assessment, and resistance management. Deliverables are precisely defined across all workstreams. Post-go-live hyper-care is treated as a formal, time-bound delivery phase with its own governance structure, tiered service levels by issue severity, dedicated named resource, escalation paths, and explicit exit criteria that define the conditions under which transition to steady-state support occurs.</i></p> |
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| | <p>5 — Exceptional <i>All workstreams are treated as interconnected delivery-critical activities with full traceability to the project plan, governance model, and go-live milestones. Migration demonstrates a rigorous phased approach including data profiling, transformation rules, parallel run strategy, and a rollback-ready cutover playbook. Testing is embedded throughout the delivery lifecycle with defined tooling, automation where appropriate, and Salesforce-specific validation. Training is multi-modal, persona-driven, and includes effectiveness measurement and post-go-live reinforcement. Change management is structured, resourced, and evidenced — not delegated to a single workstream owner or reduced to a communications plan. Evidence of a comparable engagement where all workstreams were delivered together — through client reference, case study, or sample artefacts — is provided. Post-go-live hyper-care is defined as a formal phase with its own project governance with defined response and resolution timeframes, a structured daily or weekly cadence for issue review and prioritisation, proactive monitoring of system health and user adoption in the immediate post-go-live period, and formally agreed exit criteria — including adoption thresholds, open issue counts, and stakeholder sign-off — before transition to steady-state support is permitted. A score of 5 should be rare and reserved for responses that give a mixed-panel evaluator genuine confidence across all five areas.</i></p> |
| <p>CTA in team</p> | <p><i>A Salesforce Certified Technical Architect is involved in the project team. <u>The bidder must provide copy of the Salesforce Technical Architect Certification(s).</u></i> 1- No CTA listed in the Project Team 5 - CTA listed in Project Team</p> |
| <p>Experience in both NATO and Higher Education projects</p> | <p><i>The bidder has participated in both NATO and Higher Education projects integrating Salesforce. <u>The bidder must provide copy of 3 projects with NATO or its subsidiaries or Higher education projects, including at least one integrating Salesforce, and must highlight relevant security and compliance experience. In case copy of the project cannot be provided, it is requested to present a specific attestation submitted and signed by the NATO entity or its subsidiaries.</u></i> 1- Participated in either NATO or Higher Education Project 5 - Participated in both NATO and Higher Education Project</p> |
| <p>NATO Secret Personal Security Clearance are already available</p> | <p><i>The NS PSCs for at least two team members that will receive system administration credentials are available at the time of the offer. <u>The bidder must provide copy of the NS PSC(s).</u></i> 1- PSC not available 5- NS PSC available</p> |

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| Salesforce Global Strategic Partnership status valid by 28 February 2026 | <i>The bidder has achieved Salesforce Global Strategic Partnership status valid by 28 February 2026. <u>The bidder must provide copy of the Salesforce Global Strategic Partnership Certification.</u></i> |
| | <i>1 - Platinum Strategic Partnership status valid by 28 February 2026 evidence supplied</i> |
| | <i>5 - Global Strategic Partnership status valid by 28 February 2026 evidence supplied</i> |

7.4 RFP BID Template

Below is the structure that the response to the RFP for LOT 1 should follow, outlining the required sections and key elements to ensure a clear, comprehensive and compliant submission. Bidders scoring 16 points or less in the qualitative criteria evaluation will be deemed non-compliant.

1. SHORT COMPANY DESCRIPTION

The bidder should provide a concise overview of the organization that helps NDC understand who the bidder is, what they do, and why they are relevant to the tender, including partnership with Salesforce, sizing of Salesforce practice (number of practitioners, certifications, partnership level etc. ...)

2. PROFESSIONAL PROFILES

The bidder should provide an overview of the profiles that will be involved in the project team, including years of experience, whether a Salesforce Certified Technical Architect is included in the team and whether the profiles anticipated to have access to the Production environment have a valid NATO Secret personal security clearance.

- The team must involve at least the following senior resources, we expect the full team to be comprised of more staff as deemed necessary by the bidder:

| 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% |

3. EXPERIENCE AND EXPERTISE

The bidder must demonstrate knowledge of the context through the presentation of 3 projects with NATO or its subsidiaries or Higher education

projects , including at least one integrating Salesforce, and must highlight relevant security and compliance experience. The projects can be described in the “EXPERIENCE AND EXPERTISE” section (see RFP Bid Template section for reference).

4. PROJECT SCOPE

The bidder must demonstrate a thorough understanding of the project's overall purpose, its strategic objectives, and the functional scope associated with each of the individual work packages.

5. PROPOSED SOLUTION & TECHNICAL ASSUMPTIONS

The bidder must provide a detailed description of the proposed technical solution for each work package, including but not limited to the technologies, implemented Salesforce modules, data model, and any relevant considerations and assumptions.

6. PROJECT APPROACH AND PROJECT PLAN

The bidder must describe the approach and deliverables they will adopt for managing each of the core delivery activities: analysis, development, testing, and deployment. In addition, a defined approach and proposed deliverables must be provided for governance, data migration, change management, and compliance and risk. The proposed approach must explicitly address the objectives outlined in the relevant section of the tender. This will focus on how each workstream is structured, sequenced, and governed within the overall delivery lifecycle — including ownership, methodology, and key deliverables. The bidder must also present a comprehensive delivery plan with a maximum duration of 20 months (expressed in working days), encompassing all three work packages and their associated capabilities, and fully mapping to each of the activities detailed in the project approach.

7. SUPPORT STRATEGIES

The bidder must present a comprehensive strategy covering five key workstreams: data migration, testing, training, change management, and post-go-live hyper-care support. The strategy must demonstrate how each workstream will be resourced, delivered, and governed, with defined deliverables and explicit linkage to go-live milestones. The bidder must also demonstrate how compliance and risk are managed across the support lifecycle.



BID INSTRUCTIONS FOR SUBMITTING OFFERS

The bidders must comply with the following **formal conditions**:

1. The offers must be submitted in English only.
2. Offers must be sent by two different emails addressed to competitive.bidding@ndc.nato.int:
 - a. **One email containing** the SELF DECLARATION AND ACCEPTANCE OF CONDITIONS (Annex E) and relevant documentation to be provided in support. Please note that messages exceeding the size of 30MB cannot be received by our server. Therefore, if your message exceeds the mentioned size, please send different emails indicating the referred number in the subject (1/2, 2/2).
 - b. **One email containing** the ECONOMICAL OFFER FORM (Annex D), filled in and signed by the legal representative of the company, with prices quoted in Euros using two decimal numbers.

Both emails must be submitted no later than **02 July 2026, 17:30 Local Time**.
Both the emails, which contain the technical and economic offer, must be sent as password-protected ZIP files.

The passwords to access this protected files should be sent separately, the day after the submission deadline, that is on **03 July 2026, by 12:00 PM local time**.

The price offer shall be valid until 31st January 2027.

Whether the bidder cannot provide one or more of the aforementioned requested documents, it is necessary to submit an appropriate explanation and justification.

The inner emails **shall clearly indicate whether it is the Economical or Technical proposals** and should also indicate the **reference code of the Tender procedure**.

FAILURE TO COMPLY WITH ONE OR MORE OF THE ABOVE INSTRUCTIONS MAY DEEM THE OFFER NON-COMPLIANT AND THE QUOTATION NOT ELIGIBLE FOR CONTRACT AWARD.



ANNEX D

ECONOMICAL OFFER FORM (ONLY FOR LOT 2)

Please, be aware that:

- This offer **refers only to the Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy*, **therefore will not affect the Lot 1 at all.**
- This offer **shall at all substitute** any other previous offer presented to the NDC for **Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy*.
- Any other already presented offer for **Lot 2** of the *Invitation for the implementation of a Salesforce solution covering the digital transformation of the NATO Defense College (NDC), Rome – Italy* **will not be evaluated.**
- On the contrary, **all the offers already received for Lot 1 are still valid and cannot be modified.** As soon as this integrative process related to Lot 2 starts, the technical board will be asked to evaluate the technical proposals for lot 1 and assign the related scores. The economic offers for lot 1 and 2 will be together decrypted and evaluated after the new bid closing date for Lot 2.
- Only offers submitted according to Annex D and under the bid indications/documentations will be accepted. Any other form or condition different than the ones indicated by the NDC will not be considered acceptable.
- Partial offers that include only some of the below indicated mandatory and future licenses will not be evaluated.
- The NDC is obliged to order only its actual requirements and **will award only the mandatory licenses, while reserving the right to activate the future licenses based on its needs and available resources.** The mandatory licenses **will be subscribed starting from 2027**, however the NDC, at its sole discretion, reserves the right to anticipate the subscription of one or more mandatory licenses by the end of 2026.

- **The award licenses prices are to be considered firm and fixed for the entire term of the contract.** However, renegotiations since the third year (2029) onward could be accepted and included in the following contract.
- The following contract **will only be concluded under the STANDARD BIDDING AND CONTRACT SPECIFICATIONS at Annex A** that will exclusively govern the future relationship. Therefore, the NDC will not accept any other Order Form or agreement.

| | |
|--------------------|---|
| DESCRIPTION | Implementation of a Salesforce solution covering the digital transformation: |
|--------------------|---|

| <i>LOT 2</i> | | | |
|--|-----------------------------|----------------------------------|---------------------------------|
| PRODUCT | ESTIMATED FUTURE Q.TY | EURO CURRENCY SINGLE PRICE | EURO CURRENCY TOTAL PRICE |
| MANDATORY LICENSES | | | |
| Education Cloud - Enterprise Edition | 32 | € | € |
| Education Cloud Limited Staff Access - Enterprise Edition | 45 | € | € |
| Customer Community Plus for Education Cloud (proposed upgrade over Experience Cloud Login) | 2000 | € | € |
| Sandbox (Full Copy) - Enterprise Edition | 1 | € | € |
| Knowledge - Enterprise Edition | 5 | € | € |
| Tableau Cloud Creator (existing - maintain) | 5 | € | € |
| Tableau Cloud Explorer | 3 | € | € |
| Tableau Cloud Viewer | 50 | € | € |
| Premier Success Plan - Salesforce Platform - Enterprise Edition | 1 | € | € |
| Privacy Center - Enterprise Edition | 1 | € | € |
| Signature Success - Salesforce Platform - Enterprise Edition | 1 | € | € |
| LOT 2 MANDATORY LICENSES GRAN TOTAL | | | € |

| FUTURE LICENSES | | | |
|---|---|---|---|
| Previously: Digital Engagement - Enterprise | 5 | € | € |

| | | | |
|---|------|---|----------|
| Edition / now: Agentforce Contact Center Digital - Enterprise Edition | | | |
| Survey Response Pack (1,000) | 1 | € | € |
| Asset Scheduling - Enterprise Edition | 1 | € | € |
| Agentforce for Education Add-on - Enterprise Edition | 32 | € | € |
| Flex Credits (100k) - Enterprise Edition | 2 | € | € |
| Data 360 on Flex for Agentforce Add-On - Enterprise Edition | 500 | € | € |
| MuleSoft Automation Starter | 1 | € | € |
| MuleSoft Anypoint Platform - Enterprise Edition | 1 | € | € |
| Salesforce Shield - Enterprise Edition | 1 | € | € |
| Tableau Embedded Analytics | 5 | € | € |
| Tableau Next Creator | 3 | € | € |
| Mobile Publisher for Employees and Members - Enterprise Edition | 77 | € | € |
| Mobile Publisher for Logins (Per Month) - Enterprise Edition | 2000 | € | € |
| Service Cloud Voice - Enterprise Edition | 1 | € | € |
| Feedback Management - Starter - Enterprise Edition | 1 | € | € |
| Marketing Cloud Growth | 1 | € | € |
| LOT 2 FUTURE LICENSES GRAN TOTAL | | | € |

Place and date _____

Signature of the Legal Representative _____

BID AWARD APPROACH

The **Lot 2** contract will be awarded, subject to availability of sufficient funds, by “**Best price approach**” according to the best “**LOT 2 MANDATORY LICENSES GRAN TOTAL**”. On the contrary, Lot 1 will follow up on the previous indication/rules. As soon as this integrative process related to Lot 2 starts, the technical board will be asked to evaluate the technical proposals for lot 1 and assign the related scores. The economic offers for lot 1 and 2 will be together decrypted and evaluated after the new bid closing date for Lot 2.

However, be aware of the following:

- The individual cost per all the licenses (mandatory and future) **must be specified**.
- The sum of the individual cost per all the licenses (mandatory and future) **must match** the “GRAN TOTAL” offers.
- If a bidder offering a “LOT 2 **MANDATORY** LICENSES GRAN TOTAL” is not more competitive than the other bidders’ offers for “LOT 2 **FUTURE** LICENSES GRAN TOTAL”, the bidder who made the best LOT 2 **MANDATORY** LICENSES GRAN TOTAL offer **will be requested to align** the offer for the LOT 2 **FUTURE** LICENSES GRAN TOTAL to the best price.
- If the bidder does not accept such an alignment, **the bid will be awarded the cheapest offer for each "GRAN TOTAL"**.

A copy, not authenticated, of the valid identity document of the subscriber is attached to this declaration

(*) ITALIAN SUPPLIERS: Prices are net of VAT because the NATO Defense College is exempt pursuant to art. 72-paragraph 1, letter b) of the D.P.R. 633 of 10/26/1972 and subsequent amendments.

INTERNATIONAL SUPPLIERS FROM NATO COUNTRIES: NATO Defense College is exempted from all Customs duties and quantitative restrictions on imports and exports in respect of articles imported or exported by the College for its official use, regardless of the amount. Under this provision, goods imported by the College for its official use are also exempt from VAT.



ANNEX E

SELF DECLARATION
AND ACCEPTANCE OF CONDITIONS

(This document shall form an integral part of the
Purchase Order issued to the awarded supplier)

I undersigned, _____ (name, title or position)

being duly authorized by: _____

Name of firm: _____

Address (Street and Nr.): _____

Town and Country: _____

1. Hereby certify that I have read and accepted all documents and conditions governing the invitation for bid, and specifically, the Standard Bidding and Contract Specifications as outlined in Annex A and the SoW as outlined in Annex B included all the referred enclosures.
2. Declare that the turnover achieved by _____ (Name of Firm) in Italy and in total over the years 2023, 2024 and 2025 as shown in the table below, is accurate and complete:

| In € | 2023 | 2024 | 2025 |
|--------------------------|------|------|------|
| Turnover Italy | | | |
| Turnover other countries | | | |
| Total Turnover | | | |

3. Declare that that _____ (Name of Firm) has no outstanding debts, defaults, or overdue payments with the financial institutions, and that the following prime bank and/or financial company shall in case report on the quality of the relationships in place, such as the correctness and punctuality in fulfilling the commitments undertaken:

Name of the Bank (or Financial Company): _____

Full Address _____

Email address _____

Telephone Number _____

Point of contact _____

4. I am aware that:

- The Authority, without any warning and at any time, will be able to control all the self-declared information and the certificates provisioned, according to the referred legal operating framework.
- The company I represent cannot – at any time and by any means – share, distribute or communicate on the information related to this Call for Tenders (and all technical documentation in support) with other entities unless authorized by NDC.
- The Authority, through its own Security Officer, will be able to ask for the Security Clearance or other security documents according to the security legal framework.
- The NDC is obliged to order only its actual requirements and **will award only the mandatory licenses, while reserving the right to activate the future licenses based on its needs and available resources**. The mandatory licenses **will be subscribed starting from 2027**, however the NDC, at its sole discretion, reserves the right to anticipate the subscription of one or more mandatory licenses by the end of 2026.
- **The award licenses prices are to be considered firm and fixed for the entire term of the contract**. However, renegotiations since the third year (2029) onward could be accepted and included in the following contract.
- The following contract **will only be concluded under the STANDARD BIDDING AND CONTRACT SPECIFICATIONS at Annex A** that will exclusively govern the future relationship. Therefore, the NDC will not accept any other Order Form or agreement.
- **Before signing the contract, the NDC may revise and integrate the RFP to include any superior technical, functional, or performance features contained in the winning bidder's proposal, where such integration is considered to be in the best interest of the NDC.**
- **A framework contract will be signed. However, the signature of the contract will not engender a financial liability for the NDC. Upon award, the**

Contracting Officer will place Purchase Orders (PO) against the Contract, based on the inputs provided by the CIS as Project Manager. The POs shall be issued by each single project on an annual basis subject to availability of funds.

- The company I represent must provide NDC at the time of the signature of the contract, to ensure adequate performance of the works/services, a bank or insurance guarantee for a value not less than 20% of the contract amount including a waiver clause regarding preliminary prosecution of the main debtor. The guarantee must be enforceable at the first request from the NDC within a maximum period of 15 days and must include cover for a period of three months beyond the period of validity of the contract. The guarantee must include cover for a period of three months beyond the period of validity of the contract.**
- The company I represent must provide NDC at the time of the advance payment of the contract amount and upon submission of a properly certified invoice by the Authority, a bank or insurance guarantee.**

5. I agree that, in the event the company I represent will award a contract for supplying whole or part of the goods and/or services covered by this invitation for bid, the aforementioned conditions will be binding.
6. I communicate that the dedicated Point of Contact (POC) for the NDC, with full and reactive availability via phone and email and, where appropriate or needed, for meetings in VTC or in person, is _____.

A copy, not authenticated, of the following documents is attached to this declaration:

- a) Certificate (or self-declaration) from **Social Security Authorities** to the effect that the bidder is up to date with the payment of social security contributions (*for Italian companies only: "Documento Unico Regolarita' Contributiva – DURC"*).
- b) Certificate (or self-declaration) from **Tax Authorities** to the effect that the bidder has met all his tax obligations in accordance with the legal provisions of the country in which he is registered (for Italian companies only: "Certificato unico debiti tributari").
- c) Certificate from **the relevant Chamber of Commerce, Industry, Craft and Agriculture** or equivalent, dated not more than 6 months prior to the signing of the

contract, giving the name, surname, place and date of birth of the persons authorized to enter into commitments, collect payments and issue receipts in the name of and on behalf of the company, and certifying that the company is free of any legal limitations on its rights, that is to say that it is not in receivership, or subject to deed of management or bankrupt proceedings, and that such situations have not occurred in the previous five years (or since the date of the company's establishment, if less than five years before).

d) Anti-mafia self-declaration (for Italian companies only).

Place and date

Signature of the Legal Representative
