INVITATION TO TENDER
UNIFIED COMMUNICATIONS

CLOSING DATE FOR RESPONSES – 5PM, 1 DECEMBER 2020

1. Objective

1.1. The objective of this tender exercise is to source a partnership with a supplier to deliver a cloud-based unified communications SaaS platform to The National Archives (TNA) to include services such as, telephony, chat, contact centre and video/voice-conferencing.

1.2. The National Archives is looking to award a contract for an initial period of **THREE** years, with an option to extend for two additional periods of up to TWELVE months each.

1.3. In order to provide additional information and context for this opportunity, and subject to level of interest, The National Archives will host a virtual open day for interested suppliers on the morning of **19 November 2020**. Attendance is encouraged but not mandatory. If you would like to attend, please email procurement@nationalarchives.gov.uk by **5pm, 13 November 2020,** with the name and email address of your attendee.

1.4. A shortlist of prospective suppliers will be prepared following an initial evaluation of bids and those selected will be asked to deliver a full demonstration of their solution, prior to bid finalisation and contract award.

2. Background

2.1. TNA is the official archive and publisher for the UK government, and for England and Wales. Its role is to collect and secure the future of the government record, both digital and physical, to preserve it for generations to come, and to make it as accessible and available as possible. It is based in Kew, South West London. More information on TNA can be found at: www.nationalarchives.gov.uk

2.2. TNA is based at one site in Kew, Richmond and has approximately 550 full-time members of staff. Under normal conditions, the majority of our workforce is office-based with most using softphones, a small proportion of desk phones and analogue DECT phones. Nearly all staff are now working away from the office using softphones and mobile apps in 8x8 or Microsoft Teams for video and audio conferencing. DECT is still in use by our onsite teams.

2.3. TNA's IT equipment is hosted in a secure environment at its site in Kew. In addition, some services are hosted in the cloud; these include cloud-based

voice, contact centre, video and unified communications, hybrid cloud proxy, Microsoft O365, Citrix management suite and Juniper VPN service.

2.4. To support our staff mobility strategy, we transitioned in 2016/17 from an onsite PBX, traditional copper-wired telephone network to a VoIP cloud-hosted voice, contact centre and unified communications platform provided by 8x8 Ltd.

2.5. We use a mix of 8x8's virtual desktop client, the 8x8 Work mobile application on corporate Android and personal smartphone devices, 8x8 Virtual Contact Centre, Poly desk phones, analogue DECT phones and analogue hard-wired emergency phones.

2.6. When we moved to a cloud platform we elected to retain the legacy DECT estate to facilitate onsite mobile communications. The analogue DECT phone system uses ASCOM IP-Blades connected to an Audio Code M800B, which uses Cloud PBX and SIP registration. Emergency analogue phones are connected across two ATA Audio Codes MP-124E FXS, which use Cloud PBX and SIP registration. We have described our current set up, configuration and usage statistics in **Appendix A**.

2.7. The TNA fibre backbone cabling is OS2 single mode fibre and is operating at 10Gbps speed. The fibre cable infrastructure is therefore fully capable of supporting the bandwidth speeds for the foreseeable future. TNA incorporates IRF technologies in the design so that the existing LAN infrastructure provides dual homed Active/Active Layer 2 paths for all attached edge switches and is therefore optimised for sub second recovery of link or switch failover.

2.8. TNA currently use Adept 2x 1000Mb dedicated Internet circuits, commissioned as active/failover, for external links.

2.9. Our Microsoft enterprise agreement includes M365 E3 licences for all our staff with a small number of F1 licences. We are currently migrating our MDM solution for corporate Android smartphones from Citrix Xenmobile to Microsoft InTune.

2.10. We have successfully used the 8x8 service for several years and have recently reviewed our strategy for the next four years. This contract renewal offers us the opportunity to better integrate our communications platform with our technology roadmap of using Office 365 and Microsoft Teams. We have determined that our preferred client for all unified communications is Microsoft Teams. **Suppliers' solutions, therefore, must integrate and use**

the MS Teams client for general unified communications (contact centre may use a separate integrated client, if required).

3. The Requirement

3.1. The National Archives requires a resilient, cloud-based software as a service solution that provides a fully integrated unified communications platform including video and voice conferencing, messaging, chat and enterprise telephony with global PSTN connectivity, using Microsoft Teams as a single unified communications client. The Microsoft Teams application will be used on desktop, mobile and web and each user will make and receive all calls seamlessly from the provider's infrastructure without the need for another client app. To supplement this section, a list of minimum requirements is included with this document and marked **Appendix B**.

3.2. The solutions provider must include provision in its pricing to design, customise, configure and commission the system to match the requirements outlined in this document and any requirements that the supplier is aware of or that may be discovered during planning and implementation.

3.3. The solution must support our use of on-site analogue emergency phones and DECT analogue infrastructure as described in this document and in Appendix A. Support includes the analogue hardware infrastructure equipment but excludes handsets, structured and endpoint cabling.

3.4. The solutions provider must offer a self-service centralised management and administration console for administration of all services. This should incorporate at least the following:

- Provisioning of phone numbers, equipment/devices and extensions.
- Administration of licences and user accounts.
- Services administration such as international dialling, call barring, voicemail, voice recording, etc.
- Switchboard services administration including for example hunt groups, pickup groups and ring groups.
- Billing, including online invoices with breakdown of costs and extension-level cost reporting.
- Contact centre administration as described in the appendices.
- A comprehensive reporting and analytics platform that can report seamlessly on all aspects of enterprise telephony, video and voice conferencing and contact centre, which provides full insight into history, call analysis, metrics and performance.

- Support and case management.

3.5. There must be full integration with Microsoft Active Directory for administration of users with support for single sign-on Active Directory Federation Services (ADFS v.4) so that users are automatically authenticated into their communications account when they log into Teams.

3.6. There must be a fully integrated virtual contact centre, delivering all aspects of contact centre management and including IVR, inbound and outbound contact centre, call recording, agent administration, wallboard and reporting.

3.7. Provide a telephone call package with at least 45,000 inclusive minutes per month to UK national landline and mobile networks. Please state in your response if you do not include UK mobile networks in the call package. Please state exclusions such as premium rate numbers.

3.8. Provide for an optional International telephone call package of 500 minutes per month inclusive of all calls to international destination landlines. Please state exclusions such as premium rate numbers and mobile networks and a list of countries included.

3.9. Ideally the solution will incorporate a web chat facility. We require an independent but integrated live web chat system that can be delivered via our website through the virtual contact centre. Specific requirements are contained in Appendix B.

3.10. The solutions provider must declare whether The National Archives requires any third party licences for their solution to operate, e.g. Microsoft E5 licences or Microsoft telephony add-on services.

3.11. The solutions provider must declare whether any bots need downloading to the Microsoft Teams bot framework and whether client or browser plugins are required with their solution.

3.12. Train the trainer and administrator training in the use of the supplier's solution must be included. End-user training aids such as videos and instructions should be available for use by TNA.

3.13. Business continuity and disaster recovery is essential to TNA. The solution must have full resiliency with a robust architecture offering at least 99.99% service availability with complete redundancy.

Information Security

3.14.   The supplier must demonstrate good information security governance and practices, typically through externally validated accreditation of policies and practices against recognised standards, e.g. Cyber Essentials Plus, ISO 27001 (see section 4 for more information on information security).

3.15.   The supplier should follow the best practice requirements for sensitive data and must provide a description of how they meet the best practice measures listed below.

3.15.1.   Demonstrate good information security risk management, through creation and adoption of a risk management plan including roles and responsibilities, risk management activities, and security controls in place to mitigate risks.

3.15.2.   Provide information on suppliers or other subcontractors used in the provision of the service, and describe how they ensure security requirements are set with suppliers and maintained throughout service operation.

3.15.3.   Adhere to EU General Data Protection Regulation (GDPR) obligations, and demonstrate their capability to act as a processor of personal data for individuals within the EU and the EEA.

Cloud Security

3.16.   Ideally the supplier will demonstrate compliance with NCSC's Cloud Security Principles and must describe in their response what they do that follows this guidance https://www.ncsc.gov.uk/collection/cloud-security/implementing-the-cloud-security-principles. This is summarised below, and the supplier should highlight where TNA has some security responsibility while using their service

- Protect data at rest and in transit, such as using strong encryption
- Keep TNA's data sufficiently separate from that of other service users
- Use operational security controls such as configuration management, vulnerability management, patching and update processes, protective monitoring and data breach management
- Carry out regular security testing, such as penetration testing

- Carry out appropriate personnel checks, such as BPSS or BS7858:2012
- Use secure development practices as part of service development
- Require service users to be authenticated, and use encryption, e.g. HTTPS for access to services.
- Carry out secure administration of their service
- Provide audit logs for use by TNA, and give advice on secure use of their service

<u>Service Levels</u>

3.17.   The following paragraphs define exactly the required level or standard for the services described in this document.

3.17.1.   A first-line support service is provided by TNA IT support staff, which involves logging tickets and attempting to resolve any incident at first discovery. All incident and request tickets are recorded, managed and monitored in TNA's IT service management toolset and follow an ITIL process approach.

3.17.2.   The supplier will provide a central point of contact (call centre or service desk) for case management, incident resolution, request, problem, change, configuration, release and advice escalation. Ideally, support services will operate 24x7 but as a minimum must operate between the hours of 7am and 8pm, Monday to Saturday.

3.17.3.   Service priorities will be determined by TNA at the time of an incident or request and the service provider should adhere to the minimum service-level targets defined in Table A below (see Section 5.3)

Table A – Minimum Service-level Targets

	Priority	Initial Response	Target Resolution	Escalation Threshold
Defect, Fault Resolution or request for Service or Advice during operational hours as defined by the contract and Changes				
Service not available or severe disruption to business services	1	Within 15 minutes	Within 2 hours	1 hours
Significant degradation of service with a large number of users affected	2	Within 30 minutes	Within 4 hours	3 hours
Limited degradation of service with a small number of users affected	3	Within 4 hours	Within 1 TNA business day	6 Hours
Engineer site visit	n/a	Within 1 TNA business day	ASAP best efforts	4 hours
Non-incident Requests	n/a	Within 1 TNA business day	ASAP best efforts	n/a

4. Additional Information

4.1. The National Archives infrastructure estate operates a mainly Microsoft environment using Server 2012 and 2016, Windows 10 and Mac OS 10.15 on laptops and Android version 10 on smartphones.

4.2. Service providers must comply with our minimum staff security clearance and all engineering staff with access to TNA's systems and services must hold a current HMG Baseline Personal Security Standard (BPSS) or equivalent. Potential suppliers should indicate if their staff hold clearance obtained through the National Security Vetting (NSV) process, such as Security Check (SC).

4.3. Service providers must comply with site security requirements and physical access arrangements for access to any site when carrying out on-site duties.

5. How to Respond

Please respond by submitting a tender response to procurement@nationalarchives.gov.uk by **5pm, 1 December 2020**.

If you have any questions relating to this opportunity, please submit them to procurement@nationalarchives.gov.uk by **5pm, 16 November 2020**.

It is for you to decide the format of your tender response. However, please ensure you complete the attached cost spreadsheet **Appendix C** and response to section 3 document **Appendix D** and ensure your response addresses as a minimum, the points below**.**

5.1. **A comprehensive description of your proposed solution**. Suppliers must describe their offering in a succinct, clear, comprehensive and unambiguous fashion. However, please ensure that within this description you specify:

- What services you will provide, and how, addressing point by point each of the services described in Section 3 (enter response in **Appendix D**).
- What resourcing commitments you are making, the skills and relevant experience of the staff involved.
- What resourcing and other commitments you require TNA to make.
- What sub-contracting arrangements (if any) you will put in place.
- What standards you will adhere to in the delivery of the solution (The Government recommends the Cyber Essentials scheme as a minimum compliance standard. Other examples are ISO, ITIL).
- What assumptions you have made in designing your proposed solution.

- How you will deliver and maintain quality of service and develop and maintain a close relationship to build trust and confidence, taking into consideration where The National Archives is located.

5.2. **Your proposed On-Boarding Plan**, highlighting risks and related mitigating actions, resourcing commitments and any assumptions you have made. Please provide a detailed description of how you intend to transition the service, including phases, milestones and timeframes and include any TNA investment required during the transitory phase.

5.3. **Your proposed Service Level Agreement (SLA)** for each service within your proposed solution. The SLA should meet the requirements specified in Section 3. If you are unable to meet the specified requirements, please describe your proposed service levels in and out of the hours described in Section 3.

5.4. **The Contract Price** (Please enter costs in **Appendix C**)

    i)   Any one-off on-boarding costs, including all professional services, carrier and third party charges required in the on-boarding of the new service

    ii)   The recurring monthly service costs, a comprehensively described, fully costed solution

    iii)   A description and rate card for non-call package telephone calls and all International rates

    iv)   Any additional costs that TNA may have to consider or is recommended by the solutions supplier

    v)   An itemised rate card for the following additional professional services for subsequent planned project work
        a. A Senior/Principal Consultant (Subject matter expert, accredited, significant experience. Involved in design & advice. Strategic).
        b. A Consultant (Less experienced than a Senior/Principal consultant, supported by senior consultant. Responsible for deployment of solutions, works with TNA staff. Tactical)
        c. An Engineer (Deployment of solutions. Operational)

Please note that any and all expenses should be included in the charging schedule. Stating 'charges exclude expenses', or similar, will result in the bid being rejected.

5.5. **Confirmation** that you are able to meet the requirements described in Sections 3 & 4 of this document, that you have access to the relevant technical skills to support this service and that you can meet the deadlines set out in the table below.

6. Procurement Timetable

Ref	Description	Date(s)
1	Invitation to Tender document is published	28 October 2020
2	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk	5pm, 16 November 2020
3	Potential Supplier Open Day* We will answer clarification questions received to date	19 November 2020
4	Deadline for TNA to respond to clarification questions**	5pm, 20 November 2020
5	Deadline for Potential Suppliers to submit their Tender Responses to procurement@nationalarchives.gov.uk	5pm, 1 December 2020
6	Evaluation and Shortlisting	7 December 2020
7	Shortlisted suppliers notified about presentation	7 December 2020
8	Date for shortlisted Potential Supplier presentation and Demonstration	14/15 December 2020
9	Award decision	18 December 2020
10	Standstill period ends and contract award	2 January 2021
11	Service operational	20 February 2021

*Subject to levels of interest – If you wish to attend the proposed open day, please advise procurement@nationalarchives.gov.uk by **5pm 13 November 2020.**

**Any clarification question that TNA deems to be relevant to more than one Potential Supplier will be shared with all Potential Suppliers via the Contracts Finder website*

7. Evaluation Criteria

7.1. Tender submissions will be evaluated using the following matrix:

Quality (your response to sections **5.1, 5.2**)	55%
Price (your response to section **5.4**)	40%
SLA (scored against section **3.1.7** & **5.3** Table A - Service Levels)	5%
Confirmation (your response to section **5.5**)	Pass/Fail

7.2. Price scores will be based on a comparison between each Potential Supplier's price offer, based on the percentage difference from the lowest bid price. The lowest offered price will receive the maximum pre-weighted score of 10 points, a price which is 20% higher will receive a score of 8 (i.e. the maximum score minus 20%).

7.3. For the Quality and SLA categories a point score between 0 and 10 is available. These points will be allocated applying the criteria as listed in the table below. If your Response mainly has the criteria of one score, but also has one or more criteria of a lower score, then that Category will be awarded the lower score.

10 Points	**Outstanding:** • Potential Supplier has provided a response that addresses all parts of the requirement • Potential Supplier has provided evidence to support all elements of their response • The evidence supplied is convincing and highly relevant to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated a high level of capability to deliver new and innovative service approaches
7 Points	**Good:** • Potential Supplier has provided a response that addresses all parts of the requirement • Potential Supplier has provided evidence to support most elements of their response • The evidence supplied is good and relevant to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated some level of capability to deliver new and innovative service approaches
5 Points	**Average:** • Potential Supplier has provided a response that addresses most parts of the requirement • Potential Supplier has provided evidence to support most elements of their response • The evidence supplied has some relevance to the requirement • Potential Supplier's response is clear and easy to understand • Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches
3 Points	**Poor:**

	• Potential Supplier has provided a response that addresses some parts of the requirement • Potential Supplier has provided evidence to support some elements of their response, but not all • The evidence supplied is weak and has limited relevance to the requirement • Potential Supplier's response is not always clear and easy to understand • Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches
1 Point	**Very Poor:** • Potential Supplier has provided a response that fails to address most parts of the requirement • Potential Supplier has provided little or no evidence to support most elements of their response • The evidence supplied is very weak and has very limited relevance to the requirement • Potential Supplier's response is not always clear and easy to understand • Where relevant, Potential Supplier has demonstrated little or no capability to deliver new and innovative service approaches
0 Points	**Fail:** • No response provided

7.4. Following this evaluation, TNA may wish to ask a predicted maximum of three Potential Suppliers for presentation and demonstration. The presentation and demonstration will then be considered among the other non-price elements when making a contract award decision.

8. Contract Terms

8.1. The Contract, and any subsequent Contract variations, shall be governed by our standard terms and conditions, available [here](#) and by submitting a response to this ITT, you accept these terms and conditions.

8.2. Please note that the information you supply in your tender submission may be used, in whole or in part, to populate the Contract. As such, please make clear and unambiguous statements about the commitments you are making.

8.3. The National Archives reserves the right not to appoint and to achieve its goals by other means.