INVITATION TO TENDER

REPLACEMENT FOR
ORACLE HIERARCHICALSTORAGE MANAGEMENT SOFTWARE

CLOSING DATE FOR RESPONSES – 12 NOON, MONDAY 28 OCTOBER 2019

1. OBJECTIVE

1.1 The objective of this tender exercise is to source a software product to replace the Oracle Hierarchical Storage Manager (OHSM) software package currently in use at The National Archives (TNA). Our aim is to procure a replacement software solution, together with implementation and on-going support services, and to work in collaboration with either the software supplier or a partner organisation to implement the proposed software on TNA's infrastructure during the current financial year.

1.2 We intend to award a contract to the selected supplier or partner for an initial period of 2 years, with an option to extend for up to two additional periods of up twelve months each (2+1+1).

2. BACKGROUND

2.1 The National Archives (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 make it as accessible and available as possible. The location of TNA is Kew, South West London and more information can be found at our website: www.nationalarchives.gov.uk

2.2 Following the announcement made by Oracle Corporation earlier this year that Premier Support for the OHSM product would cease in April 2021, TNA has taken the decision to source a replacement software solution. Assuming that a viable alternative can be found, the plan is to procure and move to this new software during the current financial year (FY2019-2020).

2.3 The infrastructure that is currently in use in combination with the OHSM software (Version 6.1) has the following components: -
   - A StorageTek SL3000 Modular Library System with 2 x T10000D, 2 x T10000C and 4 x LTO6 tape drives
   - An Oracle ZFS Storage Appliance ZS5-2
   - 2 x Oracle Sun Server X3-2L systems
   - 4 x Oracle Brocade 300 Switches
   - Oracle Solaris Cluster Enterprise Edition (Version 4.3)

2.4 Our intention is to carry out a technology refresh of the two Oracle Sun Servers and potentially the Oracle Brocade 300 switches during this financial year due to the age of these systems; this refresh is outside the scope of this requirement. Please also note that we have no plans to replace the StorageTek SL3000 Modular Library System and the Oracle ZFS Storage Appliance at this time. Any new software proposed would need to work with TNA's existing StorageTek SL3000 Modular Library System and the Oracle ZFS Storage Appliance and will need to be a supportable solution.

2.5 For reference, the amount of data currently under management of the OHSM software is approximately 3PB.

3. THE REQUIREMENT

3.1 The requirement is for the supply and delivery of a suitable software solution to replace OHSM that integrates with our infrastructure (outlined above in Section 2) and the implementation of the proposed software, with the minimum disruption to our business operations. An on-going support service will also be required for the contract term.

3.2 Potential Suppliers (or sub-contractors/partner organisations, if used) must demonstrate in their proposals a strong track record in the archival data management market.

3.3 Potential Suppliers (or sub-contractors/partner organisations, if used must have adequate staffing with the appropriate skill levels to support our needs and to meet any deadlines once these are agreed.

3.4 Potential Suppliers (or sub-contractors/partner organisations, if used) must comply with TNA's on-site security and health & safety requirements, and physical access arrangements (on an escorted basis, Monday to Friday, 9am to 5pm unless by prior arrangement) when carrying out any on-site work.

3.5 TNA recognises the benefits of innovative solutions and Potential Suppliers are therefore encouraged to demonstrate their commitment to delivering product advances within their proposals, as well as innovative features or functionality of their specific solution.

3.6 Potential Suppliers are also encouraged to provide details of any additional optional services that might provide benefit or added value to TNA. Details of these (including prices) should be provided, but it should be made clear in the proposal those services that are required for contract fulfilment and those that are discretionary.

4.   HOW TO RESPOND

4.1   If you have any clarification questions related to this requirement, please submit these to procurement@nationalarchives.gov.uk by 12 noon, Monday 7 October 2019.

4.2   Please respond by submitting the following information to procurement@nationalarchives.gov.uk by 12 noon, Monday 28 October 2019.

4.3   It is for you to determine what format your tender submission should take, however please make sure you address **as a minimum** the following:

4.3.1   **A comprehensive description of the proposed replacement product.**
You must describe the replacement product in a clear, comprehensive and unambiguous fashion. Within this product description, please ensure that you specify the specific functionality and features offered in the product, identifying whether these are standard or optional items. In this section you should identify if your proposed replacement product has any specific hardware or software dependencies.

4.3.2   **Confirmation** that the proposed replacement product will work with TNA's existing StorageTek SL3000 Modular Library System and the Oracle ZFS Storage Appliance and that this is a supportable solution. Where possible, you should give **examples** of where your system has worked in practice.

4.3.3   **A comprehensive description of your implementation services**.
You should include timescales, methodologies and prices/rate cards, any risks you have identified and what mitigations you would put in place, and any resourcing commitments that you require TNA to make.

4.3.4   **Confirmation** whether data migration will be required as part of your proposal, and **details** thereof, including any resourcing commitments that you require TNA to make.

4.3.5   **A comprehensive description of your support services**.
Describe what on-going support services are available, including the relevant Service Level Agreement information. You must specify any mandatory or optional services.

4.3.6   **A comprehensive description of your training services.**
Describe what training is available on the product and identify what training you would recommend for TNA staff.

4.3.7   **Throughout**, you should identify what **assumptions** you have made, and what (if any) **sub-contracting/business partnering** arrangements you will put in place

4.3.8   Your **Contract Price** for your proposed solution (2 year term), including all taxes and other charges, such as travel and subsistence costs. This should be broken down into costs for the product (licence, subscription, etc), implementation costs, data migration costs, training and support costs. You should include separately your pricing commitments for potential contract extensions, i.e. years 3 and 4.

5.   EVALUATION CRITERIA

5.1   Tender submissions will be evaluated using the following criteria:

Evaluation Criteria	ITT Section (NOTE: 4.3.7 throughout)	Maximum available unweighted score	Weighting	Maximum available weighted score
Product	4.3.1	10	3	30
Work with existing infrastructure	4.3.2	PASS/FAIL	-	PASS/FAIL
Implementation	4.3.3	10	2	20
Data migration	4.3.4	10	2	20
Support	4.3.5	10	0.5	5
Training	4.3.6	10	0.5	5
Price (2 year term)	4.3.8	10	4	40
TOTAL MAXIMUM AVAILABLE				**120**

5.2   The Quality categories listed above will be scored using the following criteria:

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 that add significant value to the project.
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 which may add some value to the project
4 Points	**Average:** • 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 has some 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, and/or has failed to demonstrate any value added to the project.

1 Point	**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, and/or has failed to demonstrate any value added to the project.

5.3   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%).

5.4   Subsequent to this evaluation, TNA reserves the right to shortlist a minimum of 1 and a maximum of 5 suppliers to demonstrate their system, following which those suppliers' proposals will be re-evaluated taking those demonstrations into account. We additionally reserve the right to ask shortlisted suppliers to provide references at this stage, again which will be taken into account for re-evaluation.

6. PROCUREMENT TIMETABLE

Ref.	Description	Date(s)
1	Deadline for Potential Suppliers to submit clarification questions to procurement@nationalarchives.gov.uk	12 noon, Monday 7 October 2019
2	Deadline for TNA to respond to clarification questions *	12 noon, Wednesday 16 October 2019
3	Deadline for Potential Suppliers to submit their Tender Responses to procurement@nationalarchives.gov.uk	12 noon, Monday 28 October 2019
4	Shortlist of Potential Suppliers	1 November 2019
5	Proposed Product demonstrations / phone calls to References (see Section 5.4)	Week beginning 4 November 2019
4	Award decision	12 November 2019
5	End of Standstill Period	28 November 2019

*   *Any clarification question received that TNA deems to be relevant to more than one Potential Supplier may be shared with all Potential Suppliers.*

7. CONTRACT TERMS

7.1   The Contract shall be awarded subject to our standard terms and conditions, which can be found here.

7.2   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.

7.3   The National Archives reserves the right not to appoint for this requirement and to achieve the outcomes of the project through other methods.