

IaaS+ Tender & Cloud Funding for Research

Announcement Report

August 2020



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DEFINITIONS

2016 Regulations

Dutch Public Procurement Act (Aanbestedingswet 2012, revised 1 July 2016)

Bidder / Bidders

An Economic Operator (including consortia or joint venture arrangements) who submits a Tender to this Call for Competition.

Commencement Date

The date of signing of the Framework Agreement.

Customer(s)

NRENs and their connected Institutions, individual research institutes and other entities as set out in the OJEU Notice and Annex A of Volume 0 of the Call for Competition.

Economic Operator

Any natural or legal person or public entity or group of such persons and/or entities, including any temporary association of undertakings, which offers the supply of IaaS on the market.

eduGAIN

Identity Federation service developed within the GÉANT project and providing Single Sign-On (SSO) capability enabling authentication (e.g. to verify education or student status) and easy access to services such as those addressed by the current Call for Competition. eduGAIN interconnects member institutions and their end users to a large number of service providers, and also other identity federations around the world, simplifying access to content, services and resources for the global research and education community. eduGAIN enables the trustworthy exchange of information related to identity, authentication and authorisation by coordinating elements of the federations' technical infrastructure and providing a policy framework that controls this information exchange. eduGAIN has been widely adopted by NRENs and their client institutions and has become an effective gateway to a large number of services.

Framework Agreement

An umbrella agreement that sets out the terms (particularly relating to price, quality and quantity) under which individual contracts (call-offs) can be made throughout the period of the agreement.

GÉANT Cloud Team

The GÉANT Cloud Team is made up of NREN members across many European countries to collaborate on cloud service delivery and adoption.

GÉANT Network

GÉANT interconnects Europe's national research and education networking (NREN) organisations with a high bandwidth, high speed and highly resilient pan-European backbone – connecting Europe's researchers, academics and students to each other, and linking them to over half the countries in the world.

IaaS+	See Section 2.3 of Vol.0 and the definition of Solution.
Institutions	Organisations connected to NRENs, individual research institutes and other entities as set out in the OJEU Notice and Annex A of Volume 0 of the Call for Competition
IP	Intellectual property
NREN	<p>A National Research and Education Network (NREN) is a specialised internet service provider dedicated to supporting the needs of the research and education communities within a country. The Research and Education community within each country relies on its NREN, amongst others, to advise and guide on adopting IT and to provide the right solutions</p> <p>The NREN provides national connectivity to the Research and Education community in a country and the European NRENs are connected to GÉANT.</p>
Offer	An offer submitted by a Bidder to the OCRE IaaS+ Tender.
OIP	Original Infrastructure Provider. The entity that owns and operates the infrastructure solution (platform) offered. Bids may either be direct from an OIP or an authorised reseller of an OIP.
OJEU Notice	The notice published in the Official Journal of the European Union in relation to the OCRE IaaS+ Tender.
Platform or Solution	See section 2.3 of Vol.0 of the Tender Document
Point of Presence	A building which houses terminal equipment to which the Service Items are connected.
Portal	The GÉANT eProcurement Portal available via www.supply2.geant.org
Procurement Team	A cross-departmental team from GÉANT and NRENs established for the OCRE IaaS+ Tender.
Referrer	Where the NREN acts as intermediary by making the Framework Agreements available in its country and facilitating connected institutions in purchasing from Suppliers. (Direct delivery model).
Research Institutes	Organisations which undertake creative and systematic work in order to increase the stock of knowledge – including knowledge of humankind, culture and society – and to devise new applications of available knowledge.

NREN

A National Research and Education Network (NREN) is a specialised internet service provider dedicated to supporting the needs of the research and education communities within a country. The Research and Education community within each country relies on its NREN, amongst others, to advise and guide on adopting IT and to provide the right solutions

The NREN provides national connectivity to the Research and Education community in a country and the European NRENs are connected to GÉANT.

Service Item

An identifiable component of the Service specified in Volume 2 of OCRE IaaS+ Tender documents.

Services

The solution provided by the Supplier as a set of Service Items as specified in Volume 2 of OCRE IaaS+ Tender documents.

Solution

The proposed or selected IaaS+ solution to meet the requirements defined in the tender documentation. See the definition of Solution in section 2.3 of Vol.0 in the Tender Document. The Solution is provided by an OIP.

Supplier

An offer submitted by a Bidder to the OCRE IaaS+ Tender.

Tender

The bid(s) prepared and submitted by each Bidder in response to the OCRE IaaS+ Tender.

Tender

Expanding on the referrer role, the NREN is responsible for more activities and also involved in the contracting and billing of (some of) its Institutions' service orders. The Supplier interfaces primarily with the NREN and the NREN may provide additional value-added services to the end-user institution and represents the aggregated volume, often buying upfront and invoice the individual institutions.

GÉANT may also act as an Underwriter and provide contracting and billing in cases where an NREN asks GÉANT to fulfil this role.

EXECUTIVE SUMMARY

The Open Clouds for Research Environments project (OCRE), aims to accelerate cloud adoption in the European research community, by bringing together cloud providers, Earth observation (EO) organisations and the research and education community, through ready-to-use service agreements and €9.5 million in adoption funding. Key to this are the tenders that will be published by OCRE.

This OCRE Announcement Report is divided in three parts to summarise the community requirements that came out of OCRE's requirements gathering activities, and to communicate the OCRE IaaS+ Tender and the OCRE Cloud Funding for Research.

The OCRE IaaS+ Tender part is compiled primarily from Volume 0 of the OCRE IaaS+ Tender documentation and communicates the IaaS+ Tender launched by the OCRE project and executed by GÉANT, as the coordinator of OCRE.

The official announcement and link to the texts of the OCRE IaaS+ Tender can be found at this link at the eProcurement Portal: https://bit.ly/IaaS-plus_CLOUD-tender

This Official Journal of the EU (OJEU) notice has also been published and can be accessed in this link: <https://ted.europa.eu/udl?uri=TED:NOTICE:176523-2020:TEXT:EN:HTML&tabId=1>

The OCRE Cloud Funding for Research part focuses on the adoption funding opportunity provided by OCRE for research projects to use on resulting services from the OCRE IaaS+ Tender. It identifies the high-level criteria for selection and how interested research institutions can keep informed on developments as they are communicated.



1 Introduction

The publication of the OCRE Announcement Report supports the OCRE project's aims to accelerate cloud adoption in the European research community by providing an overview of the demand and supply aspects of the cloud procurement. The document is structured as follows:

Section 2 outlines the community requirements for commercial cloud services as revealed by the requirements gathering activities.

Section 3 provides an overview of the main parties involved in setting up the procurement, details the objectives of the procurement, and briefly explains how the procurement process relates to framework agreements, contracts and a portfolio of services and provides information that is relevant to bidders.

Section 4 provides an overview of the OCRE Cloud Funding for Research programme outlining the high-level requirements for selecting projects and introduces the OCRE Expert Advisory Board and its role in ensuring fair distribution of the project's adoption funding.

Section 5 offers conclusion on the OCRE IaaS+ Tender and the OCRE Cloud Funding for Research.

Note that the tender-specific terms that are used throughout the document are defined in the Definitions preface.



2 Community Requirements

2.1 Introduction

Activities for the Long-Tail-of-Science requirements gathering for commodity cloud services were coordinated for the OCRE project by CERN. To achieve its goals, CERN collaborated with two organisations: the European Council of Doctoral Candidates and Junior Researchers (Eurodoc) and the Marie Curie Alumni Association (MCAA).

CERN, Eurodoc and MCAA jointly created a questionnaire containing 20 questions that was then disseminated throughout the Eurodoc network of national early-career representatives and Open Science Ambassadors. A requirements gathering workshop was also held as part of the programme of the Eurodoc Annual Conference on 1 April 2019 in Brussels, Belgium. A total of 81 responses were obtained. 72 were complete and the analysis of the community requirements was based on these.

This section summarises the outcomes of the community requirements that have been extracted from the report on the requirements gathering activities, Long-Tail-of-Science's Requirements for Commodity Cloud Services in Europe by Devouassoux, Jones & Fernandes [[Report](#)].

2.2 Community Requirements

The requirements gathering survey revealed that approximately half of the respondents (~49%) need a medium capacity of commercial cloud services, with high processing needs, requiring large software and data usage. A third of the respondents (~34%) have low processing needs that require small-scale software and light data usage. A small proportion (~16%) has intensive processing needs, necessitating huge software and data usage. This data is represented in Figure 2.1 below.

In the context of the OCRE requirements gathering, light usage of commercial cloud services corresponds to low processing needs, requiring small software and data usage. Medium usage corresponds to high processing needs, requiring large software and data usage. Huge usage corresponds to intensive processing needs, necessitating huge software and data usage.

As for specific types of commercial cloud services, the respondents are mostly interested in accessing storage (~64%) and compute (~51%) services.

Researchers are also looking for engineering software tools and services, such as MATLAB, Mathematica, Ansys, AutoCAD (~30%), and artificial intelligence, machine learning, and deep learning services, such as Keras and TensorFlow (~20%).

Finally, researchers are keen on using commercial cloud services to manage (~24%), visualise (~24%), and share (~20%) their data.

Figure 2.1 Expressed needs in terms of commercial cloud services of the respondents

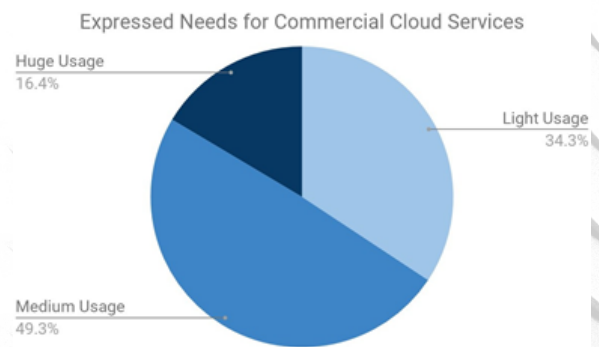


Figure 2.2 Commercial cloud services of interest for the respondents of the requirements gathering survey

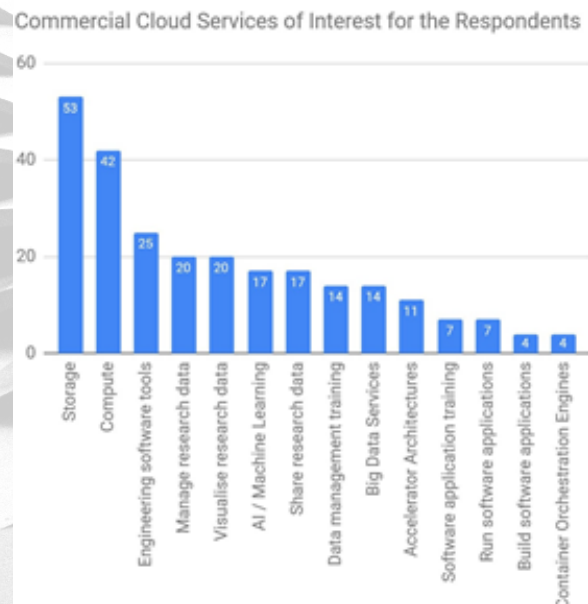
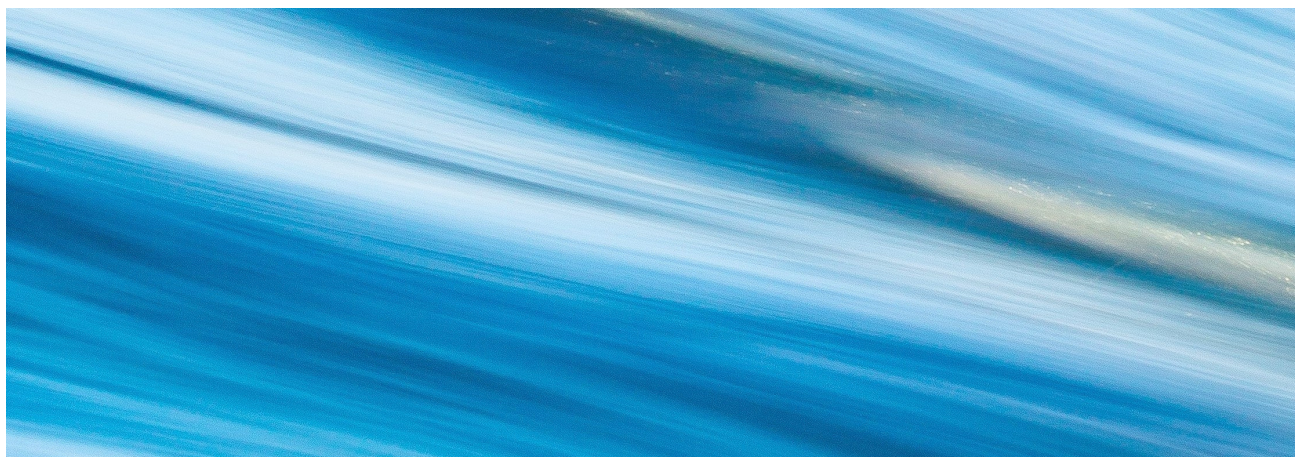


Figure 2.2 As a result of the gathering of community requirements, the Long-Tail-of-Science requirements for commercial cloud services identified in this report were proposed to the OCRE management team as an input for the preparation of this pan-European tender. The main requirements of storage and compute services along with specific software-as-a-service resulted in the focus towards IaaS+.



3 OCRE Cloud Tender

3.1.1 About GÉANT

GÉANT is a not-for-profit organisation. The GÉANT Association is controlled by its core membership of 39 European National Research and Education Network (NREN) organisations, and NORDUnet, which participates on behalf of five Nordic NRENS.

The principal activity of GÉANT is the research into, and the development and provision of, advanced electronic international telecommunications facilities, primarily for the research, academic and educational community in Europe. It also manages associated large-scale international projects and services, and organises conferences and other events to promote e-infrastructure and services for research and education.

GÉANT is acting as a centralised purchasing body in accordance with the EC procurement directive and has initiated this procurement procedure on behalf of itself and the institutions identified in the procurement documentation (NRENS and their connected institutions).

GÉANT is registered with the Chamber of Commerce in Amsterdam (GÉANT Vereniging (Association) with the registration number 40535155. The registered office is located at: Hoekenrode 3, 1102BR Amsterdam, The Netherlands.

3.1.2 About the OCRE Project

European Research and Education institutes are eager to use and benefit cloud services offer. However, the cloud brings a paradigm shift in distribution and usage models. This requires a new approach to connect supply and demand, and establish the right conditions of use. This tender is the effort of the Open Clouds for Research Environments (OCRE) project, representing a consortium of partners which includes Trust-IT, the RHEA Group and GÉANT (on behalf of the European Research and Education Networks (NRENs)). It aims to contribute to establishing a service delivery chain in order to enable Research and Education (R&E) institutes in Europe to adopt and use IaaS cloud solutions, in an easy, safe, predictable, and controlled manner.

In the consortium, the European NRENs and broader research community collaborate on cloud delivery and adoption, share expertise and resources, align roadmaps and jointly engage the market. Through this collective tender, the OCRE project wants to put in place agreements with suppliers of Infrastructure as a Service (IaaS+), and connect these to the R&E IT ecosystem. GÉANT, all NRENs (and their institutions) and other European research institutes that are part of this tender, will be entitled to use its outcomes without any additional procurement being required.

3.1.3 About the OCRE Project

The purpose of the procurement initiative is to bridge the demand and supply sides for IaaS+ and related services. It is being conducted as an Open Procedure in accordance with the Dutch Public Procurement Act (Aanbestedingswet 2012, revised 1 July 2016):

- Establish a framework and make it easy for Customers to consume IaaS+ solutions in a manner that is compliant with European procurement legislation and with the right conditions of use. By aggregating demand across the Customers and negotiating integrated brokerage and service delivery, the Customers will be able to get the best possible value from cloud services.
- Provide a direct route for Economic Operators to more easily and efficiently reach and deliver their IaaS solutions to customers.

An IaaS(+) solution or Solution is in this tender defined as follows:

An 'IaaS(+) solution' or Solution provides an on-demand availability of computer system resources, especially data storage and computing power without direct active management by the user.

This IaaS(+) solution or Solution consists of:

- IaaS Infrastructure as a Service

Where the consumer is able to deploy and run arbitrary software, which can include operating systems and applications. The consumer does not manage or control the

underlying cloud infrastructure but has control over operating systems, storage, and deployed applications; and possibly limited control of select networking components (e.g., host firewalls).

Note: This definition of compute may include server and serverless computing for example virtual machines, FPGA's, etc.

This IaaS(+) solution or Solution may (optionally) also offer:

- *PaaS (Platform as a Service)*

The capability provided to the consumer is to deploy onto the cloud infrastructure consumer-created or acquired applications created using programming languages, libraries, services, and tools supported by the provider. The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, or storage, but has control over the deployed applications and possibly configuration settings for the application-hosting environment.

- *SaaS (Software as a Service)*

Complementary Software services utilising Bidders Public IaaS / PaaS resources. These complementary software service offerings must utilise (or be based on or directly related to) the Bidders public IaaS resources (CPU, memory, storage, networking).

Managed services or license-based services (e.g. VMs with applications pre-installed from a vendor's cloud "marketplace"), and general PaaS and SaaS services available in the marketplace, and running in customer tenancies, may be included but these must be a direct consequence of the usage of IaaS services.

The definitions used for IaaS and PaaS are taken from the U.S. National Institute of Standards and Technology.

The word Platform is in the tender documents also used for 'This IaaS(+) solution or Solution'. Therefore, where 'Platform' is used in the tender documents, it should be read as 'This IaaS(+) solution or Solution'.

The Tender aims to ensure that:

- Suppliers offer an IaaS+ feature set which matches the Customers' needs.
- Customers get access to a broad range of services fitting their needs from multiple Suppliers.
- Data is handled safely, and Suppliers meet European and National regulations.
- The Customers can aggregate demand, and costs are affordable and predictable.
- Services can be acquired and used through the Customers' purchasing and management structures (such as accepting Purchase Orders and post billing).
- Services are connected to and compatible with the Customer's network and Identity Management capabilities.

Although it is the objective of GÉANT and all parties referred to in the OJEU Notice and Annex A of Volume 0 of the Call for Competition to promote and utilise the Framework Agreements as much as possible, no guarantee can be given that all institutes (universities, schools, etc.) will actually use the Call off Agreements under the Framework Agreements. Contracting authorities are not obliged, pursuant to this Directive, to procure works, supplies or services that are covered by a framework agreement, under that framework agreement.

Institution who have chosen to use of the OCRE Framework Agreements are expected to continue using the OCRE Framework Agreements for future IaaS+ services during the lifespan unless suppliers fail to deliver on the KPI's agreed in the Call-Off agreement.

As Cloud consumption in the Research and Education community varies considerably per country, it is impossible to provide a reliable spend estimate under the framework contract for the next 4 years. In 2019 the aggregated consumption under the 2016 Cloud framework was € 15 million. This consumption between 2020 and 2024 is expected to grow substantially, see Appendix B for more details.

External factors, such as local procurement rules and regulations; existing technical infrastructure, and other Framework Agreements with overlapping scope and better commercial offers from external parties may cause services scoped in this Tender to be procured elsewhere. Neither GÉANT nor the parties referred to in Appendix A can be held responsible if an Institution decides to procure the scoped services elsewhere.

3.1.4 Portfolio of Services, Framework Agreements and Contracting

It is the intention that the conclusion of this procurement process will result in a number of Framework Agreements for IaaS+ solutions awarded to Bidders who pass the Call for Competition evaluation, resulting in a portfolio of services for the Customers to consume. The Frameworks will provide standardised contract terms for use by the research and education community. This will remove, or will at least significantly reduce, the local overhead for technical, commercial or legal activities typically required when engaging new Suppliers. As a result, this procurement will significantly reduce the barriers for the Customers to consume IaaS+ solutions.

Framework Agreements are awarded to Bidders (who are selected in accordance with the mechanisms described within this Call for Competition) for up to four years from the signing of the contract.

It is expected that the Framework agreements will be signed and become operational in Q3 2020. The Framework agreements will have a contract term of 48 months and will therefore be valid until Q3 2024.

The term of each Call-Off Contract shall be as agreed between the parties to the Call-Off Contract but shall not in any event exceed four (4) years.

The OCRE project team will communicate the portfolio of services resulting from the procurement initiative to the Customers via various channels (including the NRENs and known Research collaborations) and will work with Bidders who secure a Framework Agreement on an ongoing basis to facilitate service adoption

Customers as described in Appendix A will be able to establish a contract with Suppliers directly (either through a subsequent competition or direct call-off order), by placing a call-off contract/order during the operational life of the Framework Agreement and under the terms of the Framework Agreement.



3.2 Information for Bidders

3.2.1 Procurement Process

GÉANT is using the Open Procedure under the Dutch Public Procurement Act (Aanbestedingswet 2012, revised 1 July 2016).

Bidders are deemed to understand the processes that GÉANT is following under those Regulations and all applicable European Legislation and case law.

Bidders participate in the process and submit detailed Offers in the knowledge, and on the understanding and acceptance that these directives and rules apply to the end-to-end procurement process and agree that these directives and rules apply unequivocally and that they will demonstrate adherence to them.

By participating in this Procurement Bidders are deemed to understand and comply with the procedures and conditions set out within this Volume 0, and as clarified in the other Volumes of the Tender Documents, as amended.

By participating in this Procurement Bidders agree to refrain from legal procedures questioning any legality of this tender, the Framework Agreements and or the Call of Agreements after the standstill period.

GÉANT acknowledges that the Corona pandemic may affect Bidders' abilities to respond to this tender. GÉANT tries to mitigate this by allowing Bidders significantly more time to respond to this tender as the legal minimum term. Bidders are explicitly invited to use the Clarification Question process as described in Section 3.2.3 to seek further extension if their ability to respond is hampered by resource challenges related to the Corona pandemic

GÉANT reserve the right to withdraw from this procurement process at any time up to signature of a Framework Agreement, and to disqualify late bids.

The procurement plan in Table 3.1 provides an overview of the dates in this Open Procedure procurement process.

GÉANT reserve the right to change these dates as necessary, although it will seek to minimise any changes.

TENDER ACTIONS	DAYS	START	FINISH
PUBLISH OJEU NOTICE & ITT (OPEN PROCEDURE) INCL. CONTRACT TERMS	0	10 APRIL 2020	
WEBINAR	27 APRIL 2020, 13:00 CET		
PERIOD THAT QUESTIONS CAN BE SENT IN	40	10 APRIL 2020	20 MAY 2020
GÉANT WILL ANSWERS QUESTIONS CONTINUOUSLY. FINAL NOTICE RELEASED		22 MAY 2020	
BIDDER RESPONSE TIME	53	10 APRIL 2020	2 JUNE 2020 - 11:00 CEST
DEADLINE FOR SENDING IN OFFERS	2 JUNE 2020, 12:00 CET (NOW EXTENDED 28 JUNE, 11:00 CET)		
EVALUATE SUBMITTED OFFERS ¹		2 JUNE 2020	MID-SEPTEMBER 2020
INTENT TO AWARD CONTRACT(S) SENT OUT & DEBRIEF FAILED BIDDERS VIA CORRESPONDENCE		END JUNE 2020	END OCTOBER 2020
CONTRACT PRODUCTION AND FINALIZATION		JULY 2020	NOVEMBER 2020
START DATE FRAMEWORK AGREEMENTS		JULY / AUGUST 2020	31 DECEMBER 2020

Table 3.1 - Procurement Plan

¹ Bids will be assessed and evaluated per waves of Lots. The first Lots will be evaluated in June, evaluation of all Lots is expected to last until mid-September 2020. As soon as a Lot is evaluated Bidders will be informed of the outcome. All dates in the table after June 2 are therefore for guidance only. Exact dates per Lot will be communicated during the evaluation process.

3.2.1 Guidance Notes for Bidders

3.2.2.1 Structure of the Tender Document

All documents related to this procedure are available to download via the eProcurement Portal [[Supply](#)].

This document, the OCRE Announcement Report, is not part of the Tender document. It is a communication tool to announce the launch of the tender. This OCRE Announcement Report is based on Volume 0 of a set of four Tender documents:

1. Volume 0: Information for Bidders: This document contains an overview of GÉANT, the NRENs, the Institutions, and the procurement process, guidance notes for Bidders and general conditions.
2. Volume 1: Guidance document on ESPD: The actual ESPD form is only available via the Negometrix eProcurement portal.
3. Volume 2: Invitation to Tender (ITT): This document sets out the qualitative technical, operational and commercial requirements.
4. Volume 3: Framework Agreement and Call-Off Agreement: This document contains the Terms and Conditions of Contract which will be used for contracting with the Supplier/s, subject to agreeing final terms and warranties.

3.2.2.1 Communications

All communications between GÉANT and the Bidders shall take place via the eSourcing Portal. This is to provide a complete audit trail of communications, fair play, and consistency for all, and to ensure reliable document exchange.

3.2.2.1 Clarification Questions

Bidders may submit clarification questions at any time between receiving the ITT and the deadline to submit it to GÉANT.

For audit purposes and to ensure fair play, all clarification questions must only be sent through the eProcurement portal.

All clarification questions and responses will be shared with all Bidders by default, subject to confidentiality conditions as set out in Section 0 Confidentiality.

If a Bidder does not wish to share their question due to commercial sensitivity, they should advise GÉANT at the time the question is submitted, along with a reason for this. If this justification is expressly accepted by GÉANT, a response will be given in confidence to the Bidder raising the clarification. If not accepted, the Bidder will be given the opportunity to withdraw the question or to ask for it not be published, or can accept that it will be published and shared with all other Bidders.

3.2.3 General Rules and Conditions

In addition to what is specified in the Customers as described in Appendix A will be able to establish a contract with Suppliers directly (either through a subsequent competition or direct call-off order), by placing a call-off contract/order during the operational life of the Framework Agreement and under the terms of the Framework Agreement.

Procurement Process (Section 3.2.1) and Guidance Notes (Section 3.2.2) for herein, and the conditions set out in the other volumes of the Tender Document, the following general rules and conditions shall apply to all stages of this procurement.

In addition to what is specified in Appendix A, Customers will be able to establish a contract with Suppliers directly (either through a subsequent competition or direct call-off order), by placing a call-off contract/order during the operational life of the Framework Agreement and under the terms of the Framework Agreement.

Procurement Process and Guidance Notes for herein, and the conditions set out in the other volumes of the Tender Document, the following general rules and conditions shall apply to all stages of this procurement.

3.2.3.1 Surveys, Inspections and Investigations

GÉANT reserves the right to conduct reference site visits or to make contact with Bidders' points of contact at any time during this procurement process.

Bidders will only carry out surveys, inspections and investigations at their own cost and only following express permission from GÉANT.

3.2.3.2 Bidding Costs

Each Bidder shall bear their own costs of bidding. GÉANT reserves their position whether or not to enter into contractual arrangements. Participation in the procurement is entirely at the Bidder's risk. GÉANT shall bear no liability whatsoever for the outcome of the procurement and shall not be liable for supplier costs, direct or indirect, relating to the preparation of the detailed Services or Solutions, fine-tuning, or any loss of profit or other economic loss whatsoever incurred by Suppliers or Bidders as a result of this open procedure process (whether or not an agreement is concluded with the Bidder in question, another Bidder, or not at all).

Any expenditure, costs, liability, work or effort undertaken or incurred by the Bidders in proceeding with and/or participating in this procurement ("Bidder Costs, direct or indirect") is a matter solely for the commercial judgement of the Bidder. GÉANT will not be liable to reimburse or compensate the Bidders in respect to any of the Bidder Costs, whether direct or indirect. Bidders participate in this process and submit detailed Services or Solutions in the knowledge and understanding that this is the case.

3.2.3.3 Confidentiality

The information in the Tender Document is being made available by GÉANT on condition that:

- Bidders shall at all times treat the Information as confidential
- Bidders shall not (or allow anyone else to) disclose, copy, reproduce, distribute or pass on the Information to any other person at any time or allow any of these things to happen
- Bidders shall not use the Information for any purpose other than that of proposing (or deciding whether to propose) Services or Solutions.

Bidders shall not contact nor make any statement or pass comment to the media in relation to the procurement or this Tender Document set without the express approval of GÉANT in writing. Bidders shall not undertake (or permit) at any time, whether at this stage or after any contract award, any publicity activity with any section of the media other than with the prior written agreement of GÉANT. Such agreement shall extend to the content of any publicity. In this paragraph the word 'media' includes, without limitation, radio, television, other broadcast media, newspapers or other print media, trade and specialist press, the Internet and e-mail accessible by the public at large and the representatives of such media.

Bidders may only disclose, distribute or pass Information to another person (including but not limited to, for example, legal advisers, the Bidders insurers, etc.) if either:

- this is done for the sole purpose of enabling Services or Solutions to be drawn up; and
- the person receiving the Information undertakes in writing to keep the information confidential on the same terms as set out in this Section 0; or
- the Bidder obtains the prior written consent of GÉANT in relation to such disclosure, distribution or passing of Information.

GÉANT may disclose detailed information relating to Services or Solutions to its or any of the NRENs' directors, officers, employees, agents, auditors or advisers. GÉANT also reserves the right to disseminate information that is materially relevant to the contract to all Bidders, even if the information has only been requested by one Bidder, subject to the duty to protect any Bidders commercial confidence in its Services or Solutions. GÉANT will act reasonably regarding the protection of commercially sensitive information relating to the Bidder as per the latest published guidance in this area.

Any expenditure, costs, liability, work or effort undertaken or incurred by the Bidders in proceeding with and/or participating in this procurement ("Bidder Costs, direct or indirect") is a matter solely for the commercial judgement of the Bidder. GÉANT will not be liable to reimburse or compensate the Bidders in respect to any of the Bidder Costs, whether direct or indirect. Bidders participate in this process and submit detailed Services or Solutions in the knowledge and understanding that this is the case.

3.2.3.4 Accuracy of the Information of GÉANT and their advisers

The Tender document has been prepared by GÉANT Association in good faith but does not purport to be comprehensive or to have been independently verified. Bidders should not rely on the information and should carry out their own due diligence checks and verify the accuracy of the information. Nothing in the Tender document is or shall be a promise or representation as to the future.

Bidders considering entering into a contractual relationship with GÉANT should carry out their own due diligence, make their own enquiries and investigations (and shall be deemed to have done so). The subject matter of the Tender document shall only have contractual effect when it is contained in the express terms of an executed Framework Agreement.

Neither GÉANT nor its members, directors, officers, employees, agents, auditors or advisers make any representation or warranty as to, or accept any liability or responsibility in relation to, the adequacy, accuracy, reasonableness or completeness of the Information or any part of it (including but not limited to loss or damage arising as a result of reliance by the Bidder on any of the Information contained in the Tender document).

GÉANT makes no representations or warranties regarding the Bidders financial status or stability, technical competence or ability in any way to carry out the project.

3.2.3.5 Copyright

The copyright in the documents comprising the Tender document is vested in GÉANT and may not be reproduced, copied or stored in any medium without the prior written consent of GÉANT. The Tender document, and any document issued as supplemental to it, are and shall remain the property of GÉANT and must be returned upon demand.

3.2.3.6 GÉANT's Right to Reject the Service

The issue of the Tender document in no way commits GÉANT to award any Framework Agreement pursuant to this procurement process, and GÉANT shall be able at its sole discretion to withdraw from the procurement with any Bidder, or all Bidders, at any time and at no cost, either direct or indirect, for GÉANT.

GÉANT may (but shall not be obliged), at its discretion but always acting proportionately and in accordance with Public Procurement Rules, deselect a Bidder or a Service or Solution, if (without limitation):

- the price is unaffordable
- the Service places excessive risk on GÉANT
- the Bid scores below the satisfactory minimum threshold in any area (as described further in the evaluation criteria as part of the full Tender document, Vol. 2 Invitation to Tender) and/or
- the Service or Solution is incomplete, misleading or inaccurate.

3.2.3.7 Document Amendments

GÉANT reserves the right to issue amendments or modifications to the Tender documents. These will be issued to all Bidders simultaneously, and Services or Solutions will be assumed to take account of any such modifications and amendments.

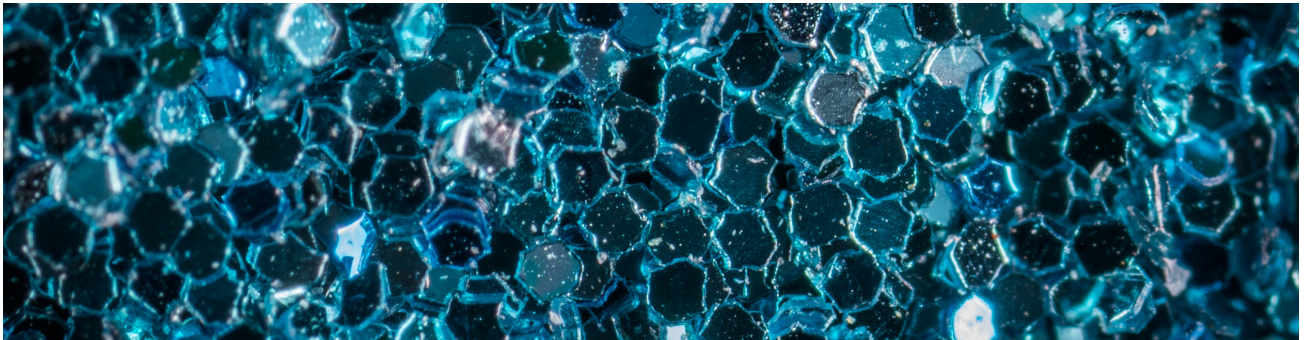
3.2.3.8 Subcontractors

Where a Bidder intends to use a subcontractor(s), it will be the responsibility of the Bidder to provide the subcontractor(s) with all the necessary information (having regard to the provisions relating to confidentiality in the Tender document) and to provide GÉANT with all similar information about the Subcontractor(s) as requested by GÉANT of the Bidder. All information about the subcontractor(s) should be submitted through the eProcurement portal by the same dates as per Table 3.1.

GÉANT recognises that arrangements in relation to subcontracting may be subject to future changes. However, Bidders should be aware that where the nominated subcontractors play a significant role, any changes to the subcontracting arrangements may constitute a material change to their tender (including the ESPD form and ITT response) and may affect their ability to continue in the procurement process. GÉANT should therefore be advised immediately if any such change occurs.

3.2.3.9 Validity of Offers

All offers made in response to this procurement shall be available for acceptance until at least 6 months days after the deadline for sending in offers. See Table 3.1 Procurement Plan.



4 OCRE Cloud Funding for Research

One of the goals that OCRE aims to achieve is to encourage more researchers to use commercial cloud and digital Earth observation services to empower their research capabilities. The OCRE tenders address this by selecting the most in-demand services from the European research community.

In addition to this, OCRE also has at its disposal €9.5 million in adoption funding to be distributed to institutions and groups of institutions that procure services through the tenders. This means the demand side is incentivised to acquire more resources from the winning suppliers from the OCRE procurement process.

Once the OCRE IaaS+ Tender is in place, OCRE will stimulate adoption in three waves. Wave 1 targets individual researchers. Only Part 2 of Wave 1 will include services resulting from the tender. Wave 1 – Part 1 is reserved for the services from the GEANT IaaS Framework. Wave 2 will fund research projects from individual institutions, and Wave 3 will co-fund services for research projects from groups of institutions represented by a lead institution. Below are the types of adoption funding available specifically for use on the resulting services of the OCRE IaaS+ Tender.

- **Individual IaaS+ Vouchers for Researchers (Wave 1 - Part 2)**

Up to €1,035,00 in vouchers are available to be distributed to individual researchers for services that result in the OCRE IaaS+ Tender.

- **Cloud Funding for Research Projects from Individual Institutions (Wave 2)**

€1,000,000 in adoption funding are available to individual institutions and groups of institutions that have listed themselves in this OCRE IaaS+ Tender

- **Co-Funding for Research Projects from Groups of Institutions Represented by a Lead Buyer (Wave 3)**

Groups of institutions that procure in the OCRE IaaS+ Tender will receive up to 50% co-funding. €2,250,000 is currently allotted for this in OCRE.

Fair and transparent distribution of the adoption funds will be ensured through the Expert Advisory Board composed of individuals external to the project and are themselves not applying for adoption funding themselves.

Multiple calls are expected to be announced with the first call for funding confirmed for launch on 15 September 2020. Additional guidelines covering precise selection criteria and distribution mechanisms will be available upon the launch of the calls.

4.1 Launch of the OCRE Cloud Funding for Research Call

OCRE will launch a new open funding call focused on consumable commercial cloud and digital services for researchers, available via its frameworks. The first funding call for projects will begin on 15 September 2020 with a webinar on the same day at 11:00 CEST and will last for six weeks with no extensions currently foreseen. Under this new funding call, OCRE aims to fund projects which:

- Intend on consuming cloud and digital services to accelerate research outcomes
- Are able to demonstrate the impact of these services in terms of their outputs and agility
- Are not currently using these tools at scale
- Provide significant relevance in terms of their research discipline
- Form part of the broader European research community
- Hope to support further research and collaboration through their efforts
- Look to begin consuming services at year end 2020 to early 2021

To receive notice of updates, research institutions interested in putting forward projects for OCRE funding can express their interest in these calls in the following link: <https://www.ocre-project.eu/express-interest-ocre-cloud-funding-opportunities>.

Given the limited timeframe where the research community can react and submit proposals, an early announcement was published on 15 July 2020 in the OCRE communication channels with dedicated outreach to European national research councils and NREs to disseminate the opportunity within their local networks.

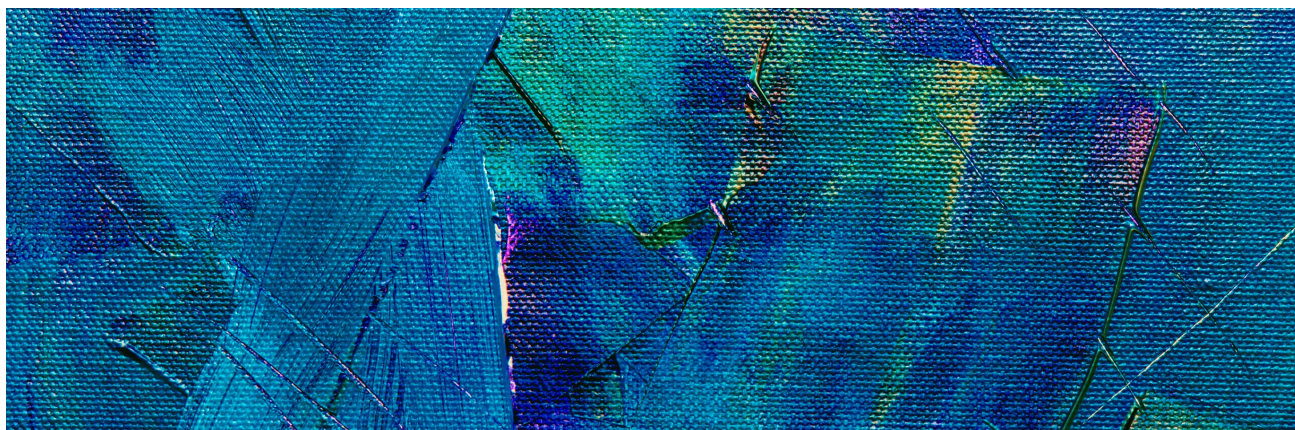
4.2 OCRE Expert Advisory Board

The OCRE Expert Advisory Board (EAB) has been established to assist the OCRE project with establishing impact and selection criteria for adoption funding and to support in the tender process. The EAB is composed of recognised external experts from diverse stakeholder groups that OCRE engages with. They ensure a fair and transparent evaluation of the tender and adoption funding distribution processes.

The advisors will work remotely and independently, in their personal capacity and not on behalf of an organisation, and they will be selected based on her/his field of expertise and proven experience in similar activities while ensuring that competences, geographical and gender coverage are factored in accordingly.

The assigned expert advisors signed a non-conflict and confidentiality agreement and are briefed on the principles guiding the calls, application and selection criteria and evaluation process. The expert advisors are granted access to the tender responses and adoption funding requests. The expert advisors' assignment, briefing, formal review and evaluation are expected to last until the end of the project.

The full list of OCRE EAB members can be accessed online [[EAB](#)].



5 Conclusion

This OCRE Announcement Report provides a quick overview of the OCRE IaaS+ Tender and OCRE Cloud Funding for Research providing an update to the supply and demand-side communities of OCRE.

The OCRE IaaS+ Tender is an important milestone of OCRE as it paves the way towards achieving a framework that will allow European researchers to more easily access commercial cloud services. To access the complete Tender Document and submit offers, please access the eProcurement Portal [[Portal](#)].

The launch of the OCRE Cloud Funding for Research also presents an important milestone for the OCRE project as it practically facilitates one of OCRE's main goals of encouraging adoption of cloud services in research. To access all current and upcoming developments regarding the Cloud Funding programme, please visit OCRE Cloud Funding for Research on the OCRE website [[Web](#)].

Appendix A - Participating Entities

This appendix describes per Lot all entities that are eligible to use the framework. Per Lot the named NREN is eligible to procure against the frameworks together with all institutes, organisations and other entities that are listed by the NREN. In some Lots additional organisations are mentioned that are not represented by the NREN but who still are eligible to procure under the framework.

The GÉANT organisation is eligible to procure under each of the 40 Lots. To allow GÉANT to subsidise, sponsor or pay for IaaS+ services on behalf of eligible Users of the framework agreements it must be able to procure services under all Lots. This provision is derived from the rules and regulations in the Grant Agreement between the EC and GÉANT.

If GÉANT procures IaaS+ services for its own operations procurement will take place via Lot 27, the Netherlands.

LOT number	Country	NREN name	NREN act as an	NREN act as an underwriter	Cost Recovery	Representing the following entities	Additional eligible organizations in this lot (not represented)	TED Value (Euro)
ALL	ALL	GÉANT Vereniging - Amsterdam Nederland		Y		https://www.geant.org/About/Membership/Pages/MAandGéants.aspx		
1	Albania	RASH -Academic Network of Albania	Y			https://www.rash.al/en/about-us/assembly-members/		€ 5,000,000
2	Armenia	Asnet	Y		Y	https://www.asnet.am/about.php?art=members&lang=en		€ 5,000,000
3	Austria	ACOnet	Y		Y	https://www.aco.net/teilnehmer.html	Spatial Services GmbH	€ 50,000,000
4	Belgium	Belnet	Y			https://belnet.be/en/customer-list		€ 50,000,000
5	Bulgaria	BREN / Bulgarian Research and Education Network	Y			https://ocre-project.eu/file/bgrenocre-institutionsdocx	Risk Space Transfer Office (RST-TTO) , Bulgarian Academy of Sciences Department of Computer Science,University of Library Studies and IT	€ 5,000,000
6	Croatia	Croatian Academic and Research Network - CARNET		Y	Y	https://www.carnet.hr/en/list-of-carnet-member-institutions/		€ 50,000,000
7	Cyprus	CYNET	Y		Y	http://www.cynet.ac.cy/english/CyNet_Members.htm		€ 5,000,000
8	Czech Republic	CESNET		Y	Y	https://owncloud.cesnet.cz/index.php/s/dataG7GLVepIwIX		€ 25,000,000
9	Denmark	DeiC	Y		Y	https://www.deic.dk/en/node/554		€ 25,000,000
10	Estonia	EENet/HITSA	Y		Y	http://www.eenet.ee/cgi-bin2.rb?qa=esl		€ 5,000,000
11	Finland	CSC - IT Center for Science Ltd		Y	Y	https://wiki.edunet.fi/x/4MYt_Bg	VTT Technical Research Centre of Finland Ltd.	€ 100,000,000
12	France	RENATER	Y			https://www.ocre-project.eu/file/renatervisx		€ 50,000,000
13	Georgia	GRENA	Y			https://www.grena.ge/ocre		€ 5,000,000
14	Germany	DFN	Y		Y	https://www.dfn.de/index.php?id=77550	CPOSI	€ 100,000,000
15	Greece	GRNET	Y			https://grnet.gr/infrastructure/peers/		€ 5,000,000
16	Hungary	KIFU	Y			https://www.ki.fu.hu/institutions/		€ 25,000,000
17	Iceland	Rhnet	Y			www.rhnet.is/english/connected.html		€ 5,000,000
18	Ireland	HEAnet	Y		Y	https://www.heanet.ie/about/client-list		€ 100,000,000
19	Israel	Inter-University Computation Center		Y		https://www.jucc.ac.il/en/infrastructuretechnologies/cloud-services/jucc-cloud-users-2019/		€ 5,000,000
20	Italy	GARR	Y			https://www.garr.it/en/infrastructures/network-infrastructure/connected-organizations-and-sites?key=all	Fondazione Scuola di Musica di Fiesole ONLUS; ISTITUTO SUPERIORE DI SANITA; Consiglio Nazionale delle Ricerche (CNR);	€ 100,000,000
21	Lithuania	Kaunas university of technology (LITNET)	Y					€ 5,000,000
22	Luxembourg	RESTENA Foundation	Y			https://wiki.geant.org/display/gn41sa7/TaaS+tender+institutions%3A+RES+TENA		€ 5,000,000
23	Macedonia	Macedonian Academic Research Network - MARnet	Y					€ 5,000,000
24	Malta	RicercaNET	Y		Y	http://www.ricerca.net.mt/connected/	University of Malta; CPOSI and KNP	€ 5,000,000
25	Moldova	RENAM		Y	Y	https://renam.md/category/members/		€ 5,000,000
26	Montenegro	MREN	Y			https://www.ocre-project.eu/file/mrenvisx		€ 5,000,000

LOT number	Country	NREN name	NREN act as an	NREN act as an underwriter	Cost Recovery	Representing the following entities	Additional eligible organizations in this lot (not represented)	TED Value (Euro)
27	the Netherlands	SURF This Framework Agreement is also entered into for the benefit of participating institutions from primary education, special education, secondary education and Vocational education. The participating institutions from the aforementioned sectors will be specified via the link above no later than the latest day of the final notice to be released in response to questions, as indicated in section 2.1 of		Y	Y	https://www.ocre-project.eu/file/surf-ocre-eligible-institutions-v3.xlsx	GEANT Vereniging	€ 150,000,000
28	Norway	UNIT	Y		Y	https://www.unit.no/sites/default/files/media/filer/2020/02/RettigheterShare_rammeavtaler%20OCRE%202020.pdf		€ 100,000,000
29	Poland	PSNC/POZNAN		Y		https://drive.man.poznan.pl/s/7Zn5K65Qn4DPM		€ 50,000,000
30	Portugal	Fundação para a Ciência e a Tecnologia I.P.	Y		Y	https://www.fcgn.pt/wp-content/uploads/2019/07/OCRE_ListOfConfirmedEntities.pdf	INL; Universidade Lusófona	€ 25,000,000
31	Romania	Agency ARNIEC/RoEduNet	Y		Y	https://www.edu.ro/instituti%20inv_superior%20de%20stat%20civile https://www.edu.ro/instituti%20inv_superior%20de%20stat%20militare https://www.edu.ro/instituti%20de%20inv_superior%20particulare%20acreditate https://www.edu.ro/instituti%20inv_superior%20particulare%20autorizate%20provisionar https://www.edu.ro/biblioteca-universitare https://www.sir.edu.ro/carta/ http://www.research.gov.ro/articol/4485/structuri-subordonate-si-in-coordonare		€ 5,000,000
32	Serbia	Akademski mreža Republike Srbije -	Y			http://www.amres.ac.rs/cp/institucije/lista-amres-korisnika	University of Belgrade	€ 5,000,000
33	Slovenia	ARNES	Y			http://www.arnes.si/infrastructure/members-of-the-arnes-network/		€ 5,000,000
34	Spain	Entidad pública empresarial Red.es (RedIRIS)	Y			https://www.rediris.es/rediris/instituciones/lista.php		€ 100,000,000
35	Sweden	SUNET	Y		Y	https://www.sunet.se/sunets-nat/anslutna/		€ 100,000,000
36	Switzerland	SWITCH	Y		Y	www.switch.ch/edu www.unimeduisse.ch/de/ueber-uns/traegerschaft www.kispi.uzh.ch/de www.ukbb.ch www.balgrist.ch		€ 25,000,000
37	Turkey	TUBITAK ULAKBİM	Y			https://stat.ulakbim.gov.tr/harici/institutes.php		€ 5,000,000
38	Ukraine	URAN Association	Y			http://www.uran.ua/~eng/uran-members.htm		€ 5,000,000
39	United Kingdom	JISC	Y		Y	https://geantclouds.sharepoint.com/sites/clouds/OCRE/Forms/AllItems.aspx?Id=%2Fsites%2Fclouds%2FOCRE%2Fjac%2DMembers https://www.jupc.ac.uk/member-list https://www.supc.ac.uk/about-us/our-members/our-members http://www.newpc.ac.uk/our-members http://www.hepcw.ac.uk/members/ http://www.apuc-scot.ac.uk/#!/members		€ 100,000,000
40	Slovakia	NO NREN					Institute of Ethnology and Social Anthropology, Slovak Academy of	€ 5,000,000

Table A.1: Participating Entities

The above tables are also available as a separate document on the eProcurement portal.

Glossary

EAB

Expert Advisory Board

ESPD

European Single Procurement Document

