



Consolato Generale d'Italia
Houston

Houston, November 17th, 2023
Prot. N. 4077

E-ARC
3700 Westchase Dr.
Houston, TX 77042
Att.n Mr. Jim Sheridan
Att.n Mr. Chris Alch

**CALL FOR PROPOSALS FOR THE ADJUDICATION OF DIGITALIZATION
SERVICES OF THE CONSULAR ARCHIVES OF
THE CONSULATE GENERAL OF ITALY IN HOUSTON**

- 1. Contracting Entity:** Consulate General of Italy, 1330 Post Oak Blvd., ste. 1950 Houston, TX 77056
- 2. Method of Adjudication:** the most economically advantageous offer. While inviting a number of companies to submit an offer, this Consulate General saves the right to proceed to adjudication in the case of only one candidate presents an offer.
- 3. Object of the contract:** The object of the contract is the digitalization services of the consular archives of the Consulate General of Italy and the training of the consular personnel to elaborate digitalized documents when a new file is opened. The service will be performed in accordance with the attached Technical Specifications (Annex A). No modifications of any kind regarding the Technical Specifications are permitted during submission of the bid or during the performance of the contract. Once the selection procedure is completed and the adjudication occurs, the Consulate will enter into a binding contract with the Winning Company.

The consular archives of the Consulate General of Italy in Houston contain, at the date of this call for proposal, about 15,000 (fifteen thousand) files with an average of 50 images per file, stored in approximately 90 linear ft. of shelving.

Maximum contract amount: US\$ 120,000.00

- 4. Mandatory requirements for participating in the bidding process:**
 - a) The contract between the Consulate and the Company will be signed for a fixed amount of time and the price will be fixed for the duration of the contract.
 - b) Companies interested in submitting an offer, before formalizing their offer, must visit the facilities where the services covered by this contract are to be provided. The visit is

necessary for collecting all the information useful at the time of submitting the offer for the performance of the tasks indicated by this call for proposals.

For each visit carried out, a specific supporting document will be delivered to the representative of each company concerned, to be inserted in envelope n. 1 "Administrative Documentation". Failure to accredit this visit will result in the exclusion of the formulated proposal, with no possibility of rectifying this circumstance by visiting the structures once the deadline for submitting offers has expired.

5. Place of performance: Consulate General of Italy, Houston, TX

6. Governing Jurisdiction:

- a) bid selection governed by Italian Laws and specifically by D.lgs n. 50/2016 and DM 192/2017;
- b) contract regulated by Italian Law, based on the provisions of D.lgs n. 50/2016 and DM 192/2017.

7. Business License

Pursuant to D.lgs n. 50/2016 and DM 192/2017 the bid is open to companies and/or temporary joint ventures with possibly at least one operating branch in either the State of Texas, Louisiana, Arkansas, or Oklahoma (one operating branch in one State only is required) in possession of an appropriate business license. They must be qualified, licensed and registered to do business in one of the aforementioned States and/or in the territory of the United States.

8. Absence of causes for exclusion. In order to participate in the bidding process, the bidder must declare (see attachment n.1):

- a. That they are not in a status of bankruptcy, liquidation, closure of activities, or composition with creditors or in any other analogous condition and that no proceedings leading to same are currently under way;
- b. That they have not been declared insolvent by a Court in a determination other than a decision of bankruptcy that entails, in compliance with U.S. legislation, the partial or total incapacitation to manage or dispose of assets;
- c. That there are no pending proceedings to verify a state of insolvency that may lead, in compliance with federal, state or local legislation, to a declaration of bankruptcy or to any other condition entailing the partial or total incapacitation to manage or dispose of assets;
- d. That they have not been convicted by a court of any crimes against professional conduct or of financial crimes; this affidavit must be provided also for all company management and experts and for all employees that will be used;
- e. That they have not been convicted of making false statements in the drafting of required information for other solicitations and awards;
- f. That they have not been in the past and are not presently in default with the conditions of another contract;
- g. That they have not been in the past and are not presently in default with social security contributions and other benefits due employees under U.S. law;
- h. That they have not been in the past and are not presently in default with tax and fee obligations of any nature;

- i. That they have not been convicted of financial crimes or professional misconduct;
- j. That they do not use child labor and/or other forms of trafficking in human beings;
- k. The irrevocable understanding and acceptance that the contract will be governed by Italian law, as well as US federal law and all applicable state laws.

9. Adjudication criteria

The bid will be adjudicated to the most economically advantageous offer.

Each offer will be evaluated with a maximum score of 100 points*:

- (I) up to 70 points assigned to the technical proposal and
- (II) up to 30 points assigned to the economic proposal.

***Points will be awarded as follows:**

Meet all the requirements: maximum points available

Meet most of the requirements: 2/3 (0.66) of maximum points available

Meet some of the requirements: 1/3 (0.33) of maximum points available

Doesn't meet any of the requirements: 0 points

1. Technical proposal: up to 70 points will be awarded to this proposal

| <u>Evaluation of the technical proposal</u> | POINTS |
|---|---------------|
| 1. The technical offer, made explicit in a memorandum, must include all of the operational and organizational aspects outlined in the Technical specifications attached (with no additions or subtractions) | Up to 10 |
| 2. The company must guarantee quality control outlined in the Technical specifications attached, included, when in possess of, ISO certifications | Up to 30 |
| 3. The company must guarantee formation of the Consular staff outlined in the Technical specifications attached | Up to 10 |
| 4. The company must guarantee security measures outlined in the Technical specifications attached | Up to 5 |
| 5. The company must guarantee a dedicated service department and a Dedicated Account Management Team | Up to 2,5 |
| 6. The company shall provide the client with bilingual support capability | |

| | |
|--|---------------------------|
| 7. The company shall provide scanners – which will remain at the Consulate - for the training of the personnel | Up to 2,5 Up to 10 |
|--|---------------------------|

2. Economic Proposal: up to 30 points will be awarded to this proposal

Points on the economic proposal will be calculated as follows:

The least costly offer will be awarded the most points.

Other bids will be calculated proportionally on a sliding scale based on the following formula:

$$X = (A/B)*C$$

X = Economic points attribution

A = amount of the least costly service

B = amount of bid

C = highest points attribution

The winning bid will be based the highest total points, calculated on the sum of points awarded to the technical and economic proposal. In the event of a tie, the winning bid will be drawn from a lot.

10. Bid submission guidelines and terms

Bids must be submitted no later than *January 3rd, 2024* in a closed and sealed envelope to Consulate General of Italy, 1330 Post Oak Blvd, Ste 1950, Houston, TX 77056.

Any submission not conforming to this guideline shall be excluded.

The following statement must be written on the front of the envelope:

| |
|---|
| “DO NOT OPEN – Digitalization services offer enclosed |
|---|

Bidders may hand deliver Bids on weekdays, except Saturdays, from 10:00am to 1:00pm, to the front desk of the Consulate General of Italy in Houston (see address above).

In the event of hand delivery, the dedicated personnel will issue a receipt indicating the date and time of receipt of the Bid.

The timely delivery of the Bids is the exclusive responsibility of the sender.

The Bid must contain three sealed envelopes, indicating the name of the sender, the subject of the Bid and the following wording:

“A- Administrative Documents”

“B- Technical Proposal”

“C- Economic Proposal”

1) Contents of "A- Administrative Documents" envelope

Failure to provide the following documents, to be sealed in the "A- Administrative Documents " envelope, constitute grounds for rejection of Bid:

- 1) The "A- Administrative documentation" envelope must indicate the Bidder's information (name, address, telephone number and e-mail for further contacts) and the following documents:
- 2) Proof of license to do business in the State of Texas, Louisiana, Arkansas, or Oklahoma (one operating branch in one State only is required) and/or in the territory of the United States (together with a copy of ID of the bidder and copy of authorization issued by the competent U.S. local authorities to operate) as listed under point 8 of this call for proposals;
- 3) Proof of technical qualifications in the field, possibly ISO 27001 and ISO 9001 certifications¹ or equivalent US certifications;
- 4) Written sworn statement from the Company's representative that the Company has personnel to be placed at the Consulate to perform the above mentioned job. The figures shall be appointed for the full time of the contract duration. Furthermore, it must have personnel to substitute - during regular business hours - the appointed workers in case of their absence for any reason (i.e. sick days, vacation, other leave of absence, etc.);
- 5) Written sworn statement from the Company's representative of two years of professional capabilities and sound business practice in their field in the United States;
- 6) The total value of its technical qualifications through submission of a list of major provisions of services similar to those being awarded contracted during the last two years, showing dates, amounts, and procurers;
- 7) Declaration stating the absence of causes for exclusion as listed under point 8 of this call for proposals (see attachment 1). The signature under this document must be sealed by a Notary public.
- 8) Document on the protection of personal data (see attachment 2);
- 9) A copy of this letter duly signed for acceptance.

2) Contents of "B- Technical Proposal" envelope

Failure to provide the following documents, to be sealed in the " B- Technical Proposal" envelope, constitute grounds for rejection of the Bid.

¹ These are certifications, respectively the international standard that defines the requirements for setting up and managing an information security management system the first, and standards and guidelines that define the requirements for implementation within an organization of a quality management system, the second

The " **B- Technical Proposal** " envelope must indicate the Bidder's information (name, address, telephone number, and e-mail, for further contacts).

The Technical proposal must illustrate in detail how the bidder intends to meet the required criteria under the "*Technical Specifications*"-Annex A.

3) Contents of the "C- Economic Proposal" envelope

The "**C- Economic Proposal**" envelope must indicate the Bidder's information (name, address, telephone number, and e-mail, for further contacts). The economic proposal must illustrate the digitalization services plan cost.

11. Adjudication

a) Award will be adjudicated to the bidder that, following the invitation extended pursuant to point 11 of the invitation, submits the most economically advantageous offer.

In the event of a tie, the winning bid will be drawn from a lot.

An adjudication will be made even if only one bid is received. The adjudication will occur even at the presence of only one single bidder providing a complete and valid offer. The Consulate reserves the right to cancel the bidding procedure where it is deemed appropriate.

b) Partial bids are not admissible.

c) Upon adjudication and prior to stipulation of the contract, the Consulate will request presentation of a guarantee in the form of a performance bond or certified check in the amount of 10% of the total amount of the contract.

12. Company documentation to be presented at adjudication

See Annex B

13. Award notification and contract agreement

The Consulate, after having selected and adjudicated the winning bidder, will notify the same for the execution of the contract.

14. Confidentiality and access rights

The Consulate informs each and every bidder that:

- a) Bidder's data are gathered and handled for the present bid;
- b) The entity collecting the data is the Consulate General of Italy in Houston, TX.

15. Further information

The envelopes containing the required documentation for the bid will be opened for inspection at the Embassy of Italy on the first useful day after the expiration of the 30 days' notice for the sole purpose of verifying the reception of the required documents. The interested bidders will be informed of the date in which the envelopes will be open; only one representative for each company will be allowed to witness the opening of the same envelopes.

For further clarification on the bidding process and guidelines, please contact the Consulate General of Italy in Houston, TX - Administration Office (at contabile.houston@esteri.it) by five business days since the deadline for submitting the bids. The Consulate will respond to requests for clarification - to all of the participants - by e-mail no later than three days prior the deadline for the submission of bids.

16. Personal data protection

The Embassy guarantees the protection of the personal data provided by the economic operator in accordance with the Italian and Law and Regulations on the protection of physical persons with regard to the processing of personal data. (see attachment n.2).

Mauro Lorenzini
Consul General of Italy in Houston



For acceptance:
E-ARC

Attachments:

Annex A - Technical Specifications

Annex B - Documentation to be presented if winning the bid

1. Declaration on lack of causes for exclusion;
2. Declaration on the protection of personal data