

# How Do you Survive a Tender like OCRE?



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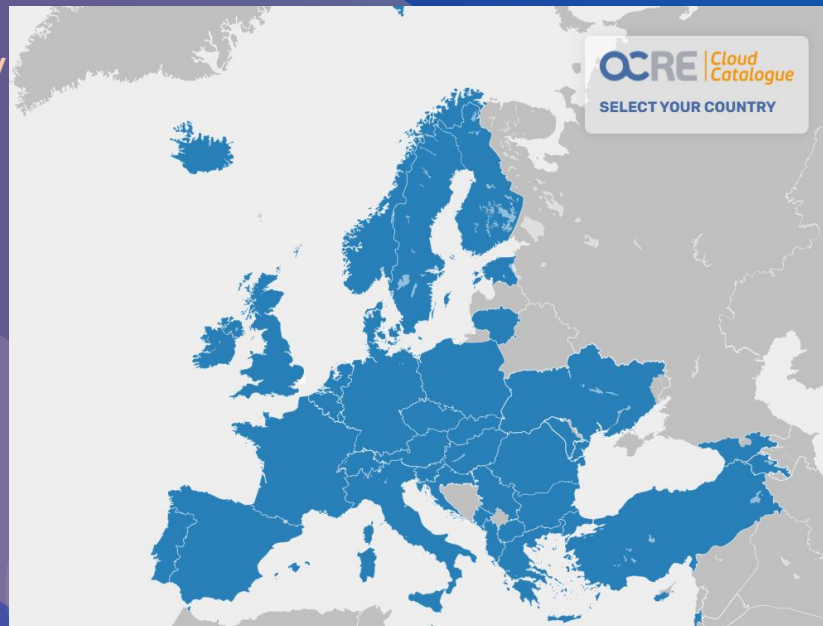


## GÉANT and the NRENS

- ☐ Catalogue of Cloud and Digital Services
- ☐ Develop relationships with market in-country
- ☐ **Provide access to call-off agreements \*\*\***
- ☐ Support local cloud forums
- ☐ Data ingress/egress waivers in place
- ☐ Host agreed upon supplier training
- ☐ Coordinate funding calls for institutes
- ☐ Provide support for local buyer groups
- ☐ **Report on local consumption trends**
- ☐ **Drive strategy and relevance**

**NO** institution should need to run their own full tender \*\*\*

**OCRE** | Open Clouds  
for Research  
Environments



# OCRE Framework legitimacy



- ✓ Framework ITT followed all guiding principles of EU tendering law, procured under Dutch law
- ✓ Competition between resellers per lot within the Framework Contract
- ✓ Call off Contracts as result of a mini-competition or direct award between reseller and institution
- ✓ For EC funded projects Voucher Contracts are signed between GÉANT and reseller to be VAT and EC GA compliant
- ✓ Institutions responsible for scoring and awarding decision
- ✓ Direct award possible under certain conditions
- ✓ Template documents to support mini-competitions
- ✓ All Contracts completely aligned with EC GA and Dutch and EU VAT legislation
- ✓ NREN may facilitate relationships between supplier and local R&E community



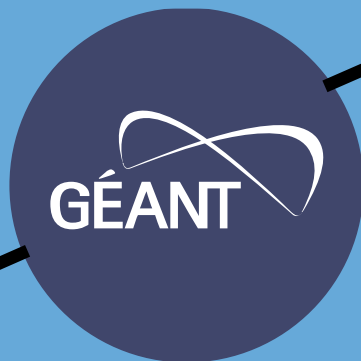
## OCRE EC Funding Procedure



OCRE EC AG

NO additional  
Dutch VAT

Payment + VAT >  
Voucher



Claims costs

VAT  
payment

MoU &  
Voucher

Supplier



Consumption  
of Services



Institute

# EC Funding for Proposals of research projects



Planning

**OCRE CLOUD services resellers** – be awarded up to €500,000 - Driving Adoption of Cloud Services within EU & UK research projects - until remaining EC budget ceiling is completed (taken EO into account).

Minimum requirements like:

- Proven adoption of Cloud Services within research project(s)
- Representing Ethical research
- One proposal per awarded EU or UK lot – several projects possible
- No double funding
- Institutions support and on time input for EC report
- Usual mini-competition MR: Vouchers, VAT, Exit plan etc.

- Published end April 2022
- MoI running until end of June
- Proposals Deadline 07/07/2022
- Scoring/Awarding July/August
- Sept 2022 standstill / start Projects
- Nov 2022 provide input for EC report

Awarding Criterium	Description	Weight (%)
1	Demonstrating the adoption and benefits of Cloud	40%
2	The project plan	20%
3	Sustainability	20%
4	Best value for money	20%

# A Monster Tender

- Why Do This?
- Where Did We Start?
- The Challenges
- How Did We Do This?
- What Happened Next?
- Time Saving Efforts
- The Result



## Why Did We Do This?

- To support the OCRE project's aims and ambitions
- To replace the 2016 IaaS Framework

## Where Did We Start?

- In all the usual places
  - Built a team
  - Engaged the market
  - Created tender documents



## The Obvious Challenges

- How to
  - run a tender for 40 countries
  - act as a central purchasing body for 10,000+ institutions
  - balance the needs of OCRE project vs. Institution needs
- BREXIT caused a change of jurisdiction



## The Less Obvious Challenges

- How to
  - Structure tender questions to facilitate evaluation
  - Analyze bids
  - Extract information from bids
  - Manage the scoring process
  - Generate success/regret letters
  - Populate and sign framework contracts
  - Build information bundles for the community



...AND still make consumption easy for end users



# How Did We Do This?

The Plan vs. Reality

## The Plan

- Identified a key set of mandatory requirements
- Identified a key set of awarding criteria
- Programs planned:
  - Build response spreadsheets
  - Analyze bids
  - Generate framework contracts -⚠



# The Reality!

## The Unforeseen

- Programs unplanned
  - Extract BYOL data from bids
  - Generate success/regret letters I
  - Generate success/regret letters II
  - Issue/manage e-signing of framework contracts
  - Build information bundles
  - OJEU award notices

## When the Tender was Published

- Pandemic Lockdown 1 was in place
- Suppliers given more time to respond
- Held a webinar mid-tender
- Answered >320 questions through the portal

**We expected c. 200-300 bids...**



## When the Tender was Closed

- We had 1060 bids
- Download of the responses was over 3.1GB
  - Over 2,000 files including
    - 740 pdfs
    - 250 spreadsheets
    - 300 Word documents
    - 48 zip files with additional documents

## Preparing for Evaluation

- Spreadsheet of bidder and country combinations
- Doing both allowed us to check program accuracy
- c. 100 bids were invalid



Built  
manually



Built by  
program

## Evaluating at Speed

- Looked for patterns in:
  - single bidder for multiple countries
  - single bidder for multiple platforms
  - multiple bids for a single platform
  - multiple bids for multiple platforms
- Sheet built manually for 4 qualitative criteria
- All other scoring computed by a set of programs







## Evaluation Complete

- Narrative reasons written by team for scoring
- Program generated success and regret letters
- All letters validated by the team before release to bidders
- 964 letters issued

## Standstill Complete

- 474 framework contracts generated by program
- All reviewed by the team
- Issued by eSign platform using a program to upload contracts
- Program tracked the progress of signoff status of all 474 contracts
- Downloaded and filed by program when signoff was completed



# General Observations

# Extremely Complex Task

- To balance the needs of:
  - NRENs
  - Institutions
  - Funders
  - Providers
- Taking into consideration the:
  - Varying maturity level of countries
  - Variations in NREN remit
  - EU/EEA/Subject to EU procurement rules and third countries
  - Local law variations
  - Framework contract under laws of Ireland
  - Call-off contract under local law

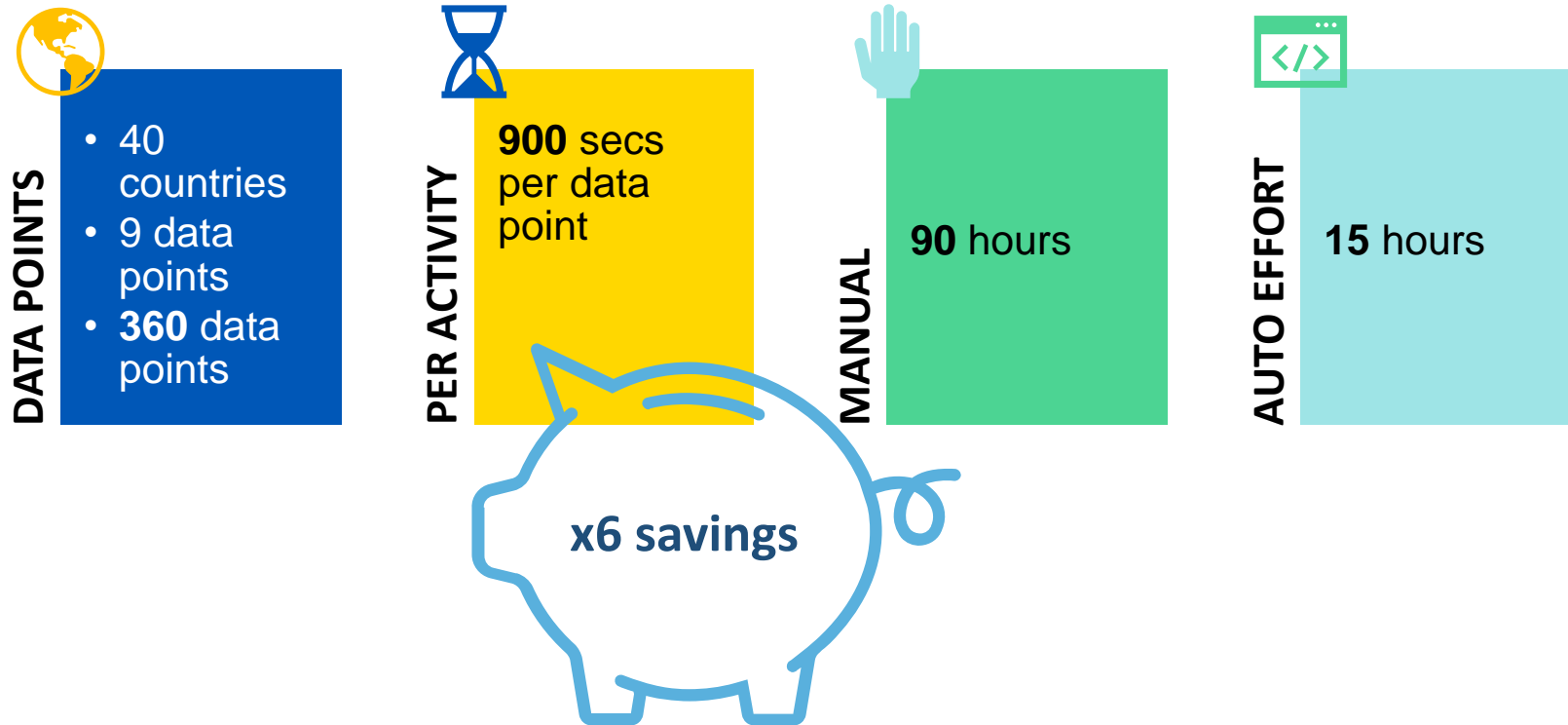
# Automation is Key

- Created template documents for
  - The Framework
  - Success/regret letters
  - Desktop mini competition
- Generated programs for:
  - Signing frameworks
  - Light mini-competition sheets
  - Bring Your Own License info
  - Award notices
  - Information bundles



# Herculean Time Saving Efforts

# Setup of spreadsheet for tender responses



# Master Scoring Setup



## Data Points

1060 bids

48 data points per bid = **50,880** data points total



## Manual Effort

60 seconds per data point = **848** hours



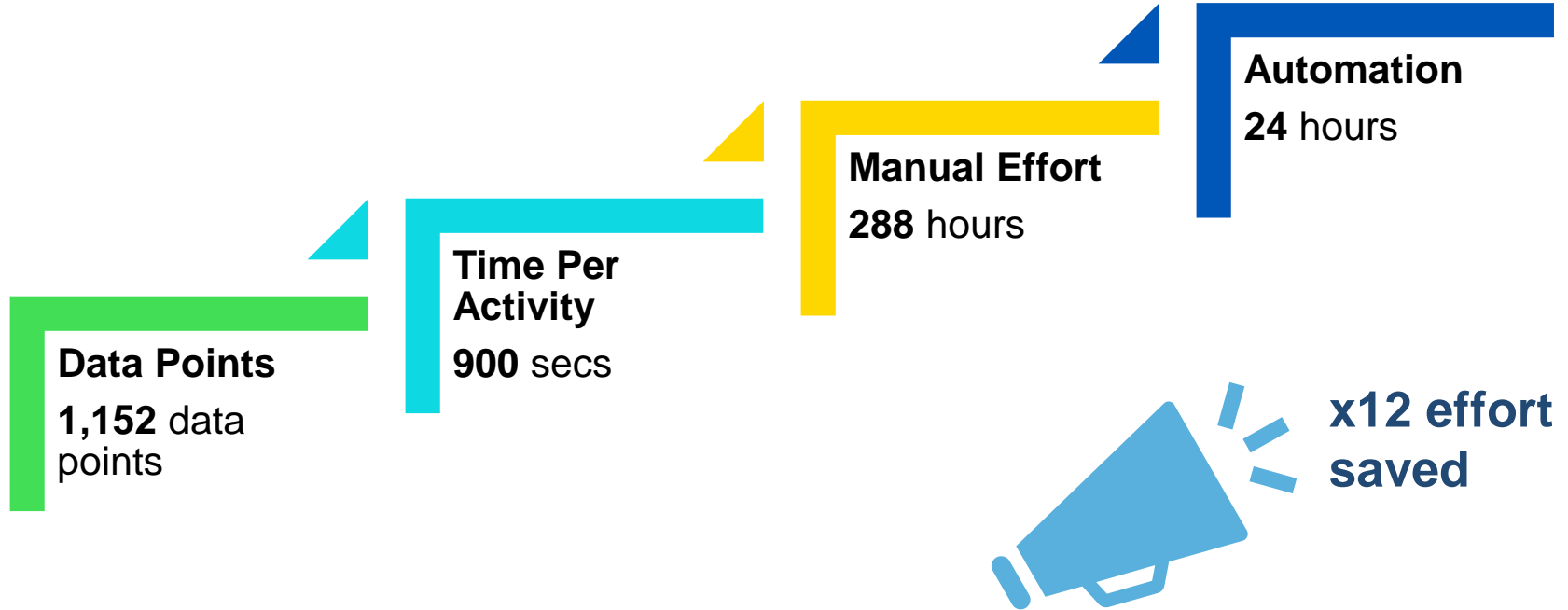
## Automation Effort

75 hours

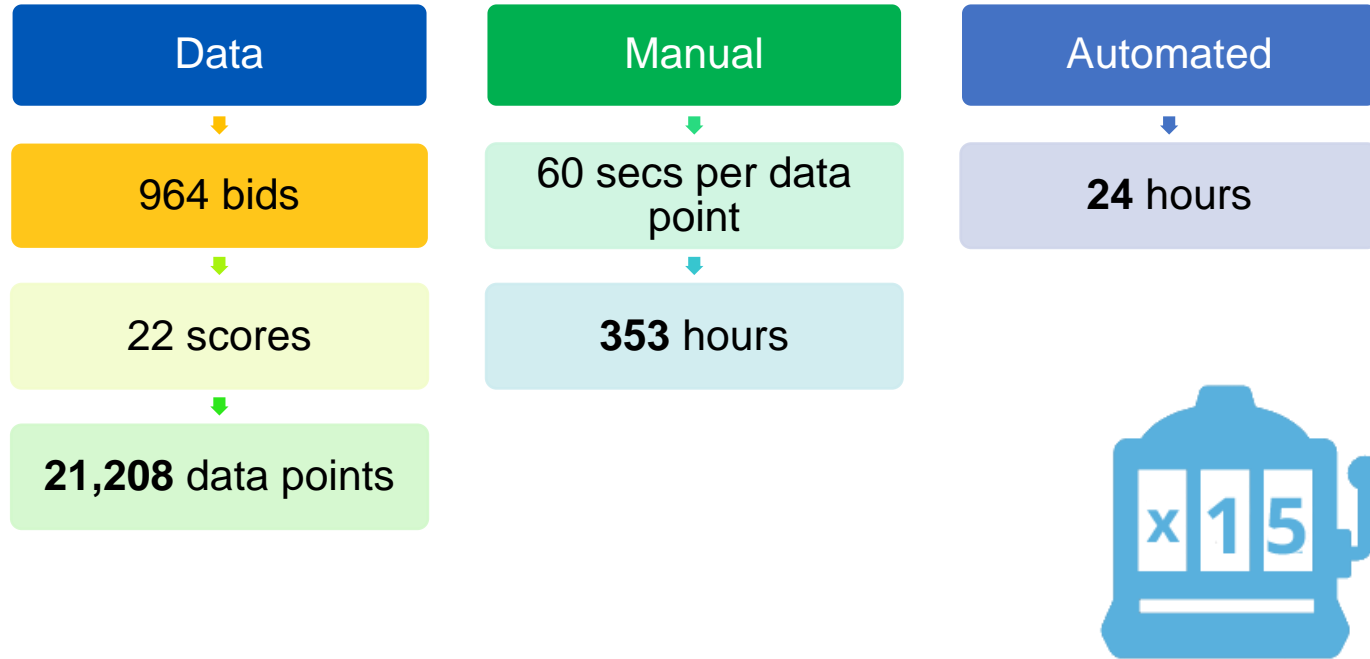




## When Bid Eliminated – Recalculation



# Bid Score Update – Recalculation



## Success/Regret Letters

- Without automation:
  - We would still be writing these today
  - Massive margin for manual error
- In addition to standard data points:
  - Scoring table
  - Narrative reasons
  - **> 50 data points per letter**



x24 SAVINGS

## Success/Regret Letters



**3,856 hours**

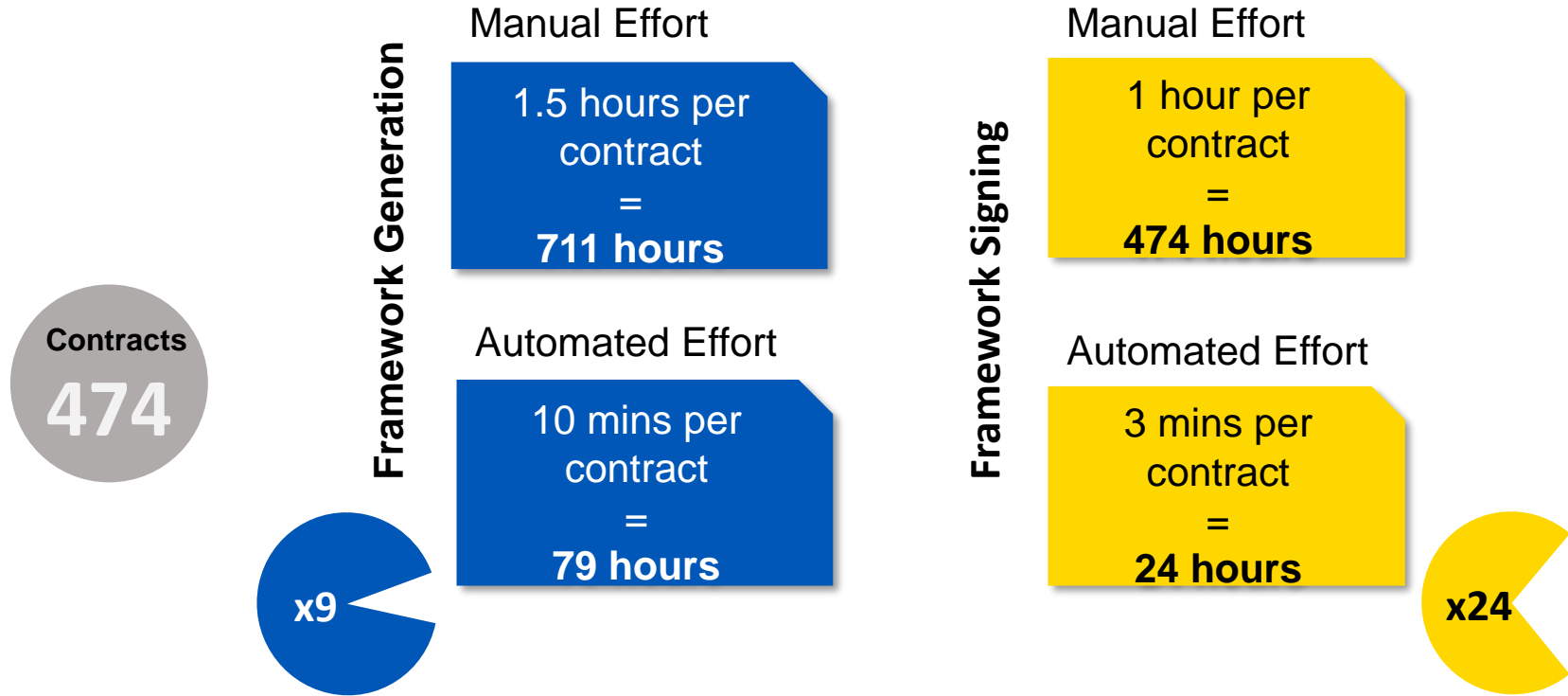
manual effort for 964 letters



**161 hours**

required through automation

# Framework Generation & Signing





## OJEU Award Notices

### Manual

- 474 contracts
- 60 minutes per notice
- 474 hours manual effort

### Automated

- 474 contracts
- 3 minutes per notice
- **24 hours** automated effort



# Things We Broke...







**But We Succeeded...**

## The Result

**An easy-to-use European framework  
and a template for future use**

# Thank you

## Any Questions?

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