How Do you Survive a Tender like OCRE?

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Session 8B

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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 ***
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

NO additional Dutch VAT
Payment + VAT > Voucher

Supplier
Consumption of Services

VAT payment
MoU & Voucher

Institute

OCRE EC AG
Claims costs

GÉANT
EC Funding for Proposals of research projects

**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.

**Awarding Criterium**

<table>
<thead>
<tr>
<th>Awarding Criterium</th>
<th>Description</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Demonstrating the adoption and benefits of Cloud</td>
<td>40%</td>
</tr>
<tr>
<td>2</td>
<td>The project plan</td>
<td>20%</td>
</tr>
<tr>
<td>3</td>
<td>Sustainability</td>
<td>20%</td>
</tr>
<tr>
<td>4</td>
<td>Best value for money</td>
<td>20%</td>
</tr>
</tbody>
</table>

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

[https://www.negometrix.com](https://www.negometrix.com)
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
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
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

**DATA POINTS**
- 40 countries
- 9 data points
- 360 data points

**PER ACTIVITY**
- 900 secs per data point

**MANUAL**
- 90 hours

**AUTO EFFORT**
- 15 hours

x6 savings
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

x10 savings
When Bid Eliminated – Recalculation

- Data Points: 1,152 data points
- Time Per Activity: 900 secs
- Manual Effort: 288 hours
- Automation: 24 hours
- x12 effort saved
Bid Score Update – Recalculation

**Data**
- 964 bids
- 22 scores
- 21,208 data points

**Manual**
- 60 secs per data point
- 353 hours

**Automated**
- 24 hours
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
Success/Regret Letters

3,856 hours
manual effort for 964 letters

161 hours
required through automation
Framework Generation & Signing

Framework Generation

Manual Effort
1.5 hours per contract
= 711 hours

Automated Effort
10 mins per contract
= 79 hours

Framework Signing

Manual Effort
1 hour per contract
= 474 hours

Automated Effort
3 mins per contract
= 24 hours

Contracts 474
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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