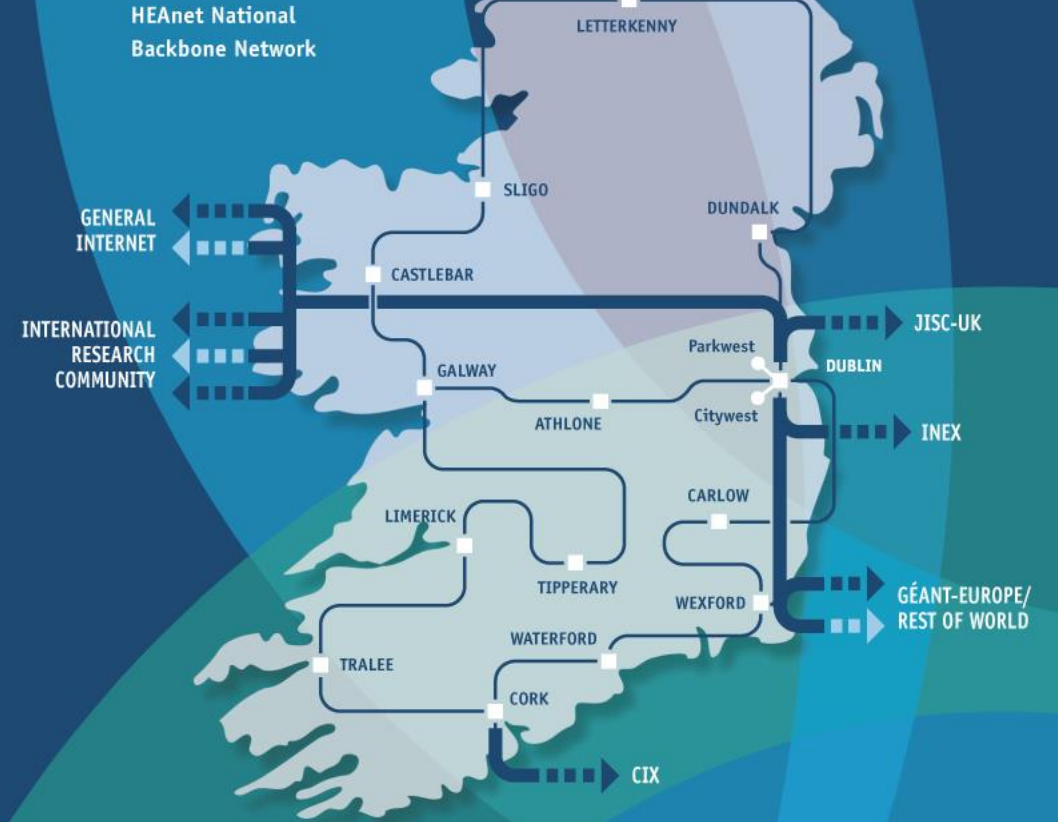




How Do you Survive a Tender That Received Almost 1100 Bids?

Garvan McFeeley
Brokerage Services Manager
HEAnet



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

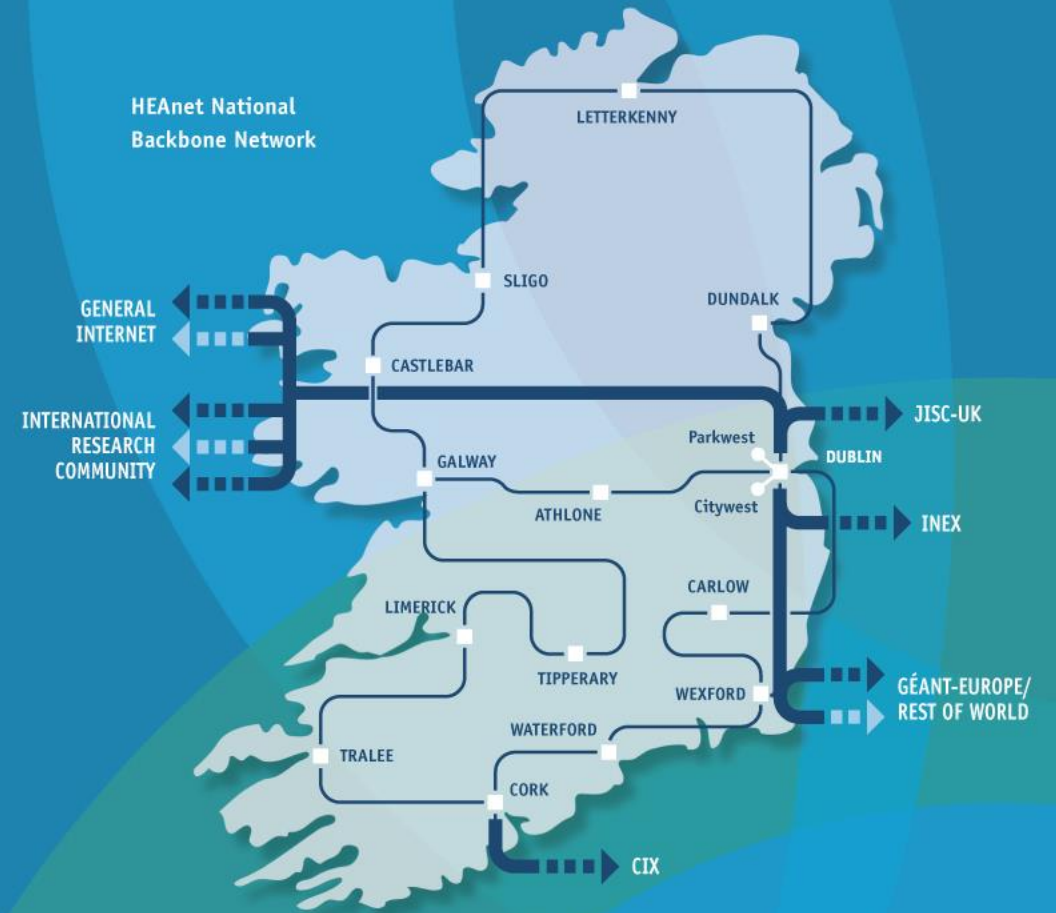
- How to
 - Structure tender questions to facilitate evaluation
 - Analyze bids
 - Extract information from bids
 - Manage the scoring process
 - Generate success/regret letters
 - Populate and sign framework contracts
 - Build information bundles for the community

...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

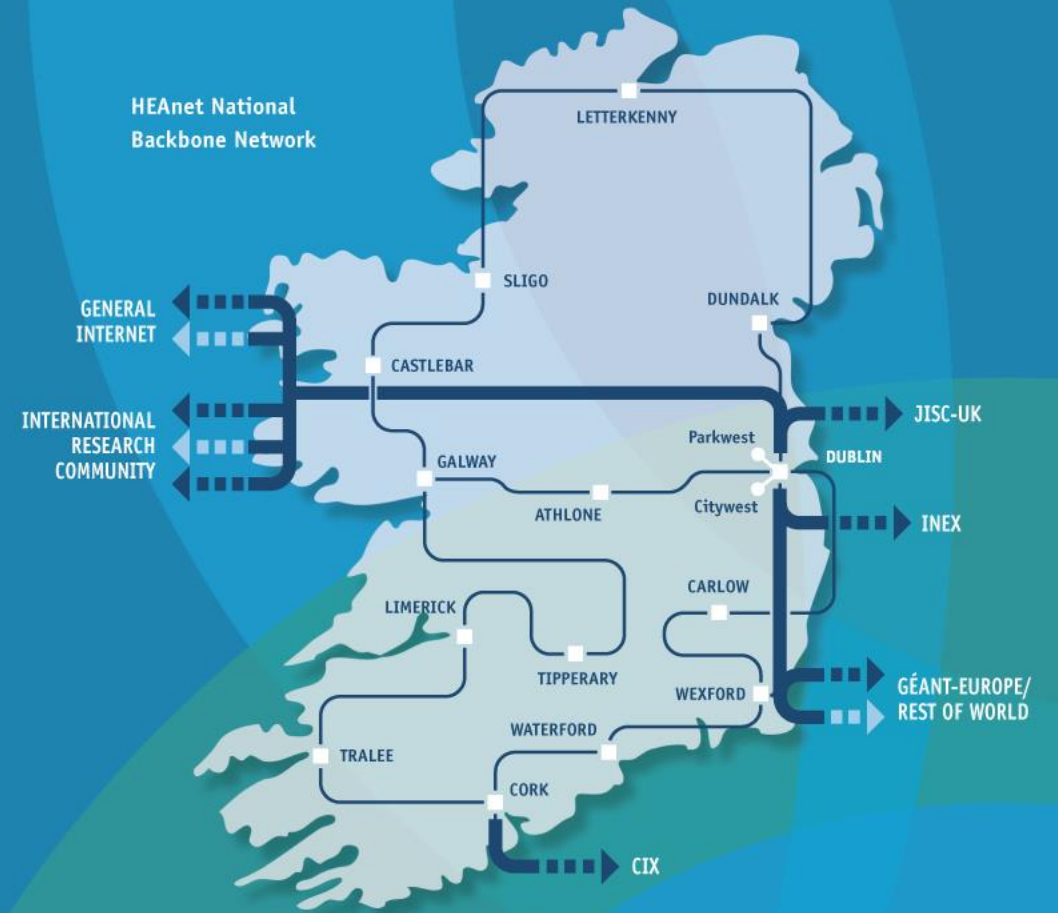
- To balance the needs of:
 - NRENs
 - Institutions
 - Funders
 - Providers
- Taking into consideration the:
 - Varying maturity level of countries
 - Variations in NREN remit
 - EU/EEA/Subject to EU procurement rules and third countries
 - Local law variations
 - Framework and Call-off contract law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

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



Spreadsheet Setup



DATA POINTS

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



PER ACTIVITY

900 secs
per data
point



MANUAL EFFORT

90 hours



AUTO EFFORT

15 hours



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



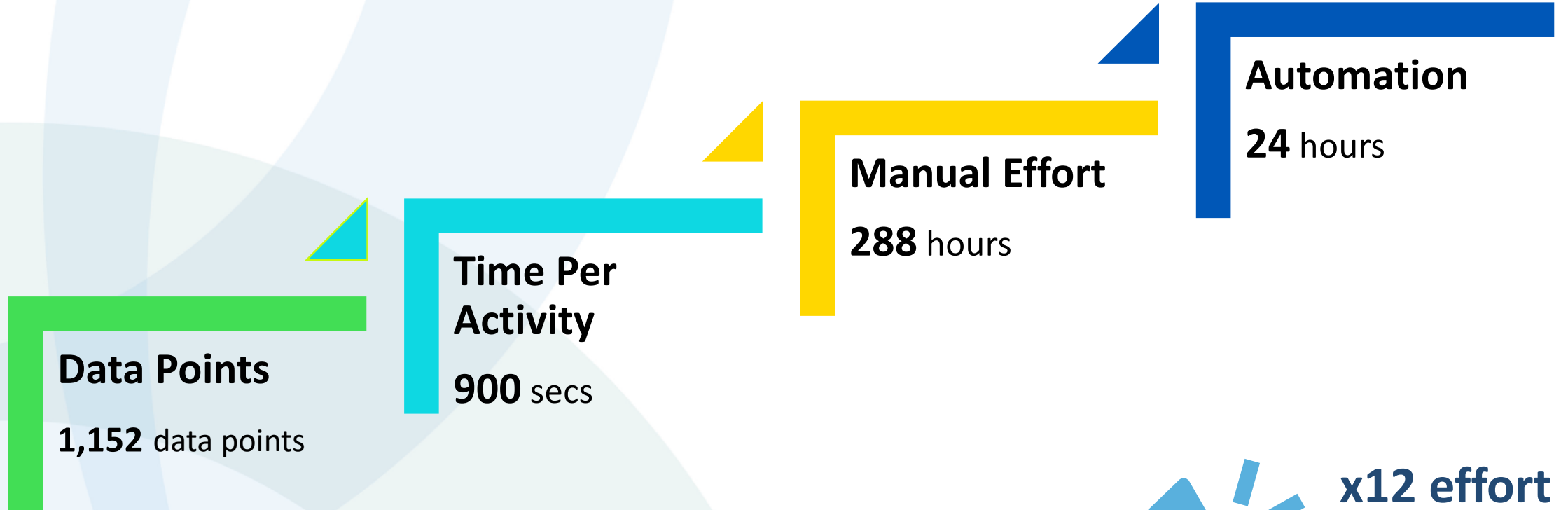
Automation Effort

75 hours

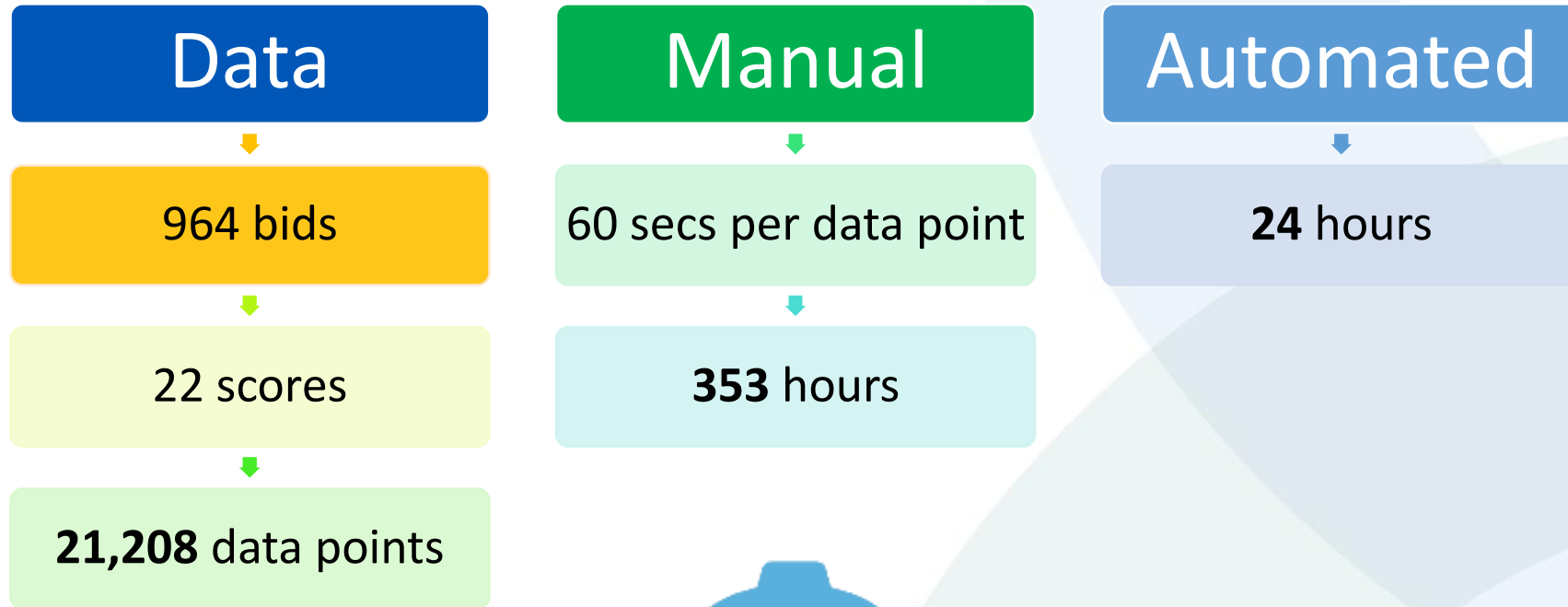


x10 savings

When Bid Eliminated – Recalculation



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**



Success/Regret Letters



3,856 hours

manual effort for 964 letters



161 hours

required through automation

x24 SAVINGS

Framework Generation & Signing

Contracts

474

Framework Generation

Manual Effort

1.5 hours per contract
=
711 hours

Automated Effort

10 mins per contract
=
79 hours

x9

Manual Effort

1 hour per contract
=
474 hours

Automated Effort

3 mins per contract
=
24 hours

x24



Award Notices

Manual

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

Automated

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

There Were Casualties...

Things We Broke!

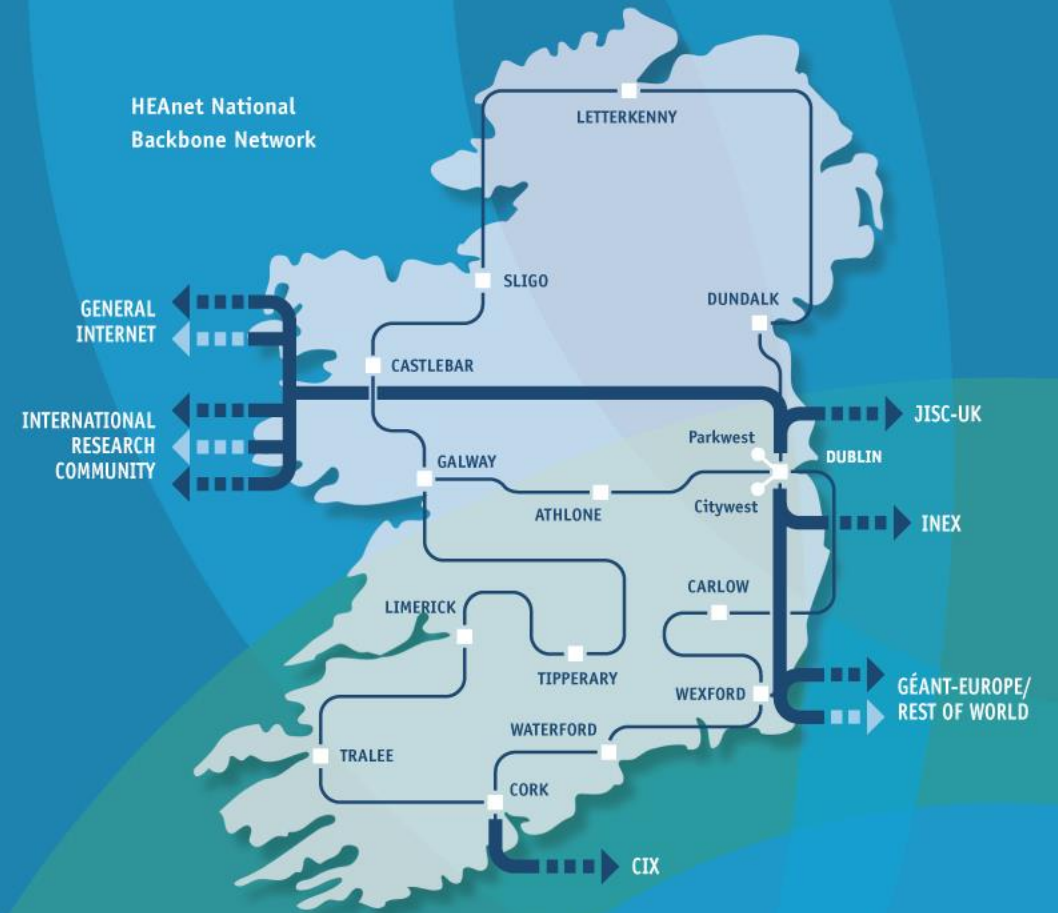


Negometrix





But We Succeeded...



The Result

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





Thank you

Any questions?

