

Website, guidelines and help desk

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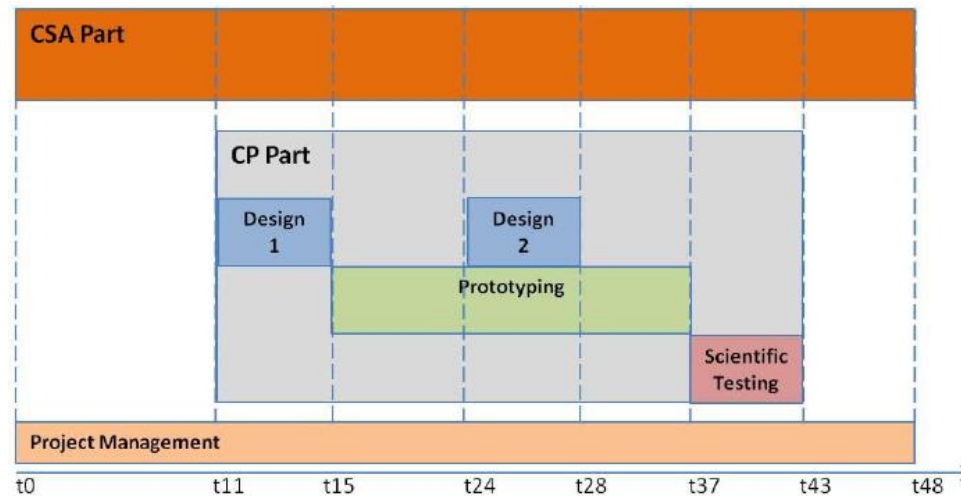
Tender schedule



	1	2	3	4	5	6	7	8	9	10
Tender preparation										
Pre-announcement										
Publication										
Tender closed										
Selection										
Negotiation & Contracting										
CP subcontracts ready to start										

- ❑ Publication of the call: **end May 2014**
- ❑ Deadline to present the proposals: **end July 2014**
- ❑ Selection of the winners: **end September 2014**
- ❑ End of the negotiation: **end October 2014**
- ❑ Start of the work: **1st November 2014**

Project implementation schedule



- ❑ **Contract start:** 1st November 2014
- ❑ **Design phase** (4 months): November 2014 – February 2015
- ❑ **Prototyping phase** (22 months): March 2015 – December 2016
 - First prototypes: March 2015 – October 2015
 - Re-design: November 2015 – February 2016
 - Second prototype: March 2016 – December 2016
- ❑ **Testing phase** (6 months): January 2017 – June 2017

Demonstrations



- The selected suppliers shall organise the following demonstrations:
1. Demo of the first prototypes at the **open source workshop** (Stockholm, December 2015)
 2. Demo of the second prototypes at the **experience workshop** (Berlin, December 2016)
 3. **Online demo** to the consortium to show the results of the testing (virtual meeting, June 2017)
 4. Physical presence with a booth at the **final conference** (Stockholm, December 2017)

How to get information



❑ **PREFORMA website:** www.preforma-project.eu

❑ **Information Days**

- Today
- PREFORMA networking session at EGI CF
2014: Helsinki, Wednesday 21/5/2014, 11am
– 12:30 pm

❑ **Help Desk:** info@preforma-project.eu

Pre-Announcement



- ❑ PREFORMA call for tender Prior Information Notice has been published on the ***Tender Electronic Daily (TED)***, the Internet version of the Supplement to the Official Journal of the European Communities:
<http://ted.europa.eu/udl?uri=TED:NOTICE:99290-2014:TEXT:EN:HTML>
- ❑ The **pre-announcement** presents the following sections of information to suppliers, and other interested parties:
 - Contracting Authority
 - Object of the contract, including information about the Framework Agreement, type of contract and place of delivery or of performance, the scheduled date for start of award procedures etc.
 - Legal, economic, financial and technical information
 - Complementary information

25/03/2014 S59 Member states - Service contract - Prior Information Notice - Not applicable

Sweden-Stockholm: Research and development services and related consultancy services

2014/S 059-099290

Prior information notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1) Name, addresses and contact point(s)

Riksarkivet

202100-1074

Box 12541

Contact point(s): Administrative Division

For the attention of: Per Elfner

SE-102 29 Stockholm

SWEDEN

Telephone: +46 104767104

E-mail: per.elfner@riksarkivet.se

Fax: +46 104767120

Internet address(es):

General address of the contracting authority: <http://www.riksarkivet.se>

Address of the buyer profile: <http://www.preforma-project.eu/>

Further information can be obtained from: The above mentioned contact point(s)

I.2) Type of the contracting authority

Ministry or any other national or federal authority, including their regional or local sub-divisions

I.3) Main activity

General public services

I.4) Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: no

The PREFORMA Website: TENDER section



The screenshot shows the PREFORMA website interface. At the top, there is a navigation bar with links: HOME, PROJECT, PARTNER, TENDER (highlighted with a white circle), ACTIVITIES, OPEN SOURCE PORTAL, COMMUNITY, DOWNLOAD, and CONTACTS. Below the navigation bar, the "TENDER" section is displayed. It includes a pre-announcement URL, publication date, deadline date, budget, call ID, status, and OJ reference. A sidebar on the right lists links: OPEN DIALOGUE, CALL DESCRIPTION, CALL DOCUMENTS, INFORMATION DAY, FAQ, and GET SUPPORT. At the bottom of the section, it says "Submit a proposal: Soon available".

PREFORMA

HOME PROJECT PARTNER **TENDER** ACTIVITIES OPEN SOURCE PORTAL COMMUNITY DOWNLOAD CONTACTS

TENDER

Pre-announcement: <http://ted.europa.eu/udl?uri=TED:NOTICE:99290-2014:TEXT:EN:HTML>

Publication date: n/a

Deadline Date: n/a (Brussels local time)

Budget: n/a

Call ID: n/a

Status: to be published

OJ reference: n/a

Submit a proposal: Soon available

OPEN DIALOGUE
CALL DESCRIPTION
CALL DOCUMENTS
INFORMATION DAY
FAQ
GET SUPPORT

The PREFORMA Website: TENDER section



☐ **BASIC INFORMATION**

☐ **OPEN DIALOGUE**

- Results of the open dialogue process between memory institutions and technology providers

☐ **CALL DESCRIPTION**

- Call objectives, expected outcomes and implementation details

☐ **CALL DOCUMENTS**

- Invitation to Tender
- Challenge Brief
- Framework Agreement
- Guide for tenderers

☐ **INFORMATION DAY**

- Link to the webpages dedicated to the PREFORMA info days

☐ **FAQ**

- Most common PCP-related questions such as who might apply, when the tender must be submitted and how, whether one company/or university/other entity might submit several tenders or just one and so on

☐ **GET SUPPORT**

- Contact details to ask specific questions

Invitation to Tender



- ❑ The basic information of the **Invitation to Tender** will be pre-announced on the project website, under the TENDER section. This includes publication date, deadline date, budget, status of the tender, call ID and link to the publication on the Official Journal.
- ❑ From the **project website** it will be also possible to download the whole *Invitation to Tender*, which includes:
 - An Introduction to the PCP
 - Administrative Instructions
 - Exclusion Criteria
 - Minimum requirements
 - Assessment of Tenders
 - Confidentiality, publicity and information about the project
 - Distributions of IPR resulting from the project
 - Judicial review
 - List of documents
 - Scoring Model
 - Channel for submission

Challenge Brief



- ❑ The challenge of the PREFORMA R&D project will be presented in a **Challenge Brief** document available for download from the **project website**.
- ❑ This brief contains the background of the PCP carried out. It provides details on the functional and technical requirements, the desired outcomes and the scope of the PCP. It also outlines very briefly and succinctly the Tender Process as a whole.
- ❑ Tenderers are expected to accept the requirements in the challenge brief as a whole, i.e. the software development and the ecosystem establishment (even if the offers refer to minimum 1 format).

How to participate



1. Tenderers browse the TENDER section of the **PREFORMA website** and connect to Riksarkivet's **tender notification system**. From this moment, they are in the tender notification system.
2. Suppliers **register**, after having received the user name and login via e-mail, they enter the PREFORMA PCP section, and **download the tender documents**: Invitation to Tender and Challenge Brief + Framework Agreement, Tender Form and Guide for Applicants.
3. When a supplier has downloaded the documents, Riksarkivet is **notified** and a **list of potential suppliers** is created by the tender notification system.
4. On time before closing, tenderers **submit their proposals** directly to Riksarkivet as specified in the Invitation to Tender. The proposals must be in **English**.

Riksarkivet's tender notification system

A screenshot of the Visma Opic login page. The page has a light blue header with the Visma logo and flags for Sweden, Norway, and Denmark. The main content area is white and contains a login form with fields for "Användarnamn" (Username) and "Lösenord" (Password). Below the fields is a checkbox for "Kom ihåg mig" (Remember me) and a blue "Logga in" button. Links for "Glömt lösenord" (Forgot password) and "Ny användare" (New user) are provided. At the bottom left, there is contact information for support. At the bottom right, there is a "VI ANVÄNDER COOKIES" banner. The right side of the page features a large image of a person standing on a rocky peak with arms outstretched against a blue sky with clouds.

VISMA

Välkommen till Visma Opic

Användarnamn

Lösenord

Kom ihåg mig ☐

Logga in

[Glömt lösenord](#) [Ny användare](#)

Support 0771-440 200
support.opic@visma.com

VI ANVÄNDER COOKIES

Framework Agreement



- ❑ The **Framework Agreement** presents to the tenderers the terms and the obligations set forth by Riksarkivet (the National Archives), which is the Contracting Authority.
- ❑ The *Framework Agreement* (authored and produced by the Swedish Governmental Agency for Innovation Systems as part of the ongoing SILVER project) outlines the **terms and obligations** between the Contracting Authority and the suppliers, including intellectual property rights, rights to data and exploration of IPR.
- ❑ It is organized into a number of sections, subdivided into clauses:
 - Section 1: Form of Agreement
 - Section 2: Terms and Conditions
 - Section 3: Project
 - Section 4: Key Staff
 - Section 5: Documents
 - Sections 6-9: Work Orders for Phases 1, 2 and 3

Tender Form



- ❑ The ***Tender Form*** is organized in a number of sections, beginning with a description of the tender, and then followed by:
 - Tenderer Details
 - Contact Details
 - Impact on the Challenge
 - Technical Approach
 - Project plan and Methodology
 - Project Management
 - Resources
 - Risk Management
 - Potential Price
 - Professional Secrecy
 - Project Abstract
 - Fixed Price Breakdown
 - Declaration followed by signatures of the Managing Director, and other authorized persons.

Guide for Applicants



- ❑ A **Guidance document**, which give instructions to the tenderers how to fill out the *Tender Form*.
- ❑ It explains the terms of the procurement, and the pieces of information which the PREFORMA Evaluation Committee needs in order to carry out its assessment work.

The evaluation phase (1)



- ❑ The supplier selection will be done by the **Evaluation Committee** chaired by the Project Coordinator and composed by:
 - One representative from each partner
 - Two external experts.
- ❑ Evaluation of tenders will be preformed using a **three-steps model**:
 1. Compliance check
 2. Individual evaluation
 3. Consensus Meeting
- ❑ The **compliance check** consists of a check to make sure that tenders passed the following **criteria**:
 - a. Is the tender subject to any of the exclusion criteria?
 - b. Are the requirements in the administrative instructions met?
 - c. Are the minimum requirements set forth in the Invitation to Tender met?

The evaluation phase (2)



- ❑ In the **individual evaluations process** each tender is evaluated by at least three experts belonging to the Evaluation Committee.
- ❑ Based on the experts' assessments, the preliminary ranking is made, discussed and agreed upon during the **Consensus Meeting** between all the Members of the Evaluation Committee, to be sure that the assessments of all tenders are consistent and equal. The Evaluation Committee decides which companies will be awarded the R&D contracts.
- ❑ The PREFORMA PCP uses a **scoring model** based on the following main **evaluation criteria**:
 - a. Impact on the Challenge
 - b. Quality of the Tender
 - c. Price

Budget



- ❑ Total budget: **2.805.000 EUR**
- ❑ Maximum amount available for all projects in the design phase: **390.000 EUR**
- ❑ Indicative amount available for all projects in the prototyping and testing phases: **2.415.000 EUR**

- ❑ The PREFORMA consortium considers that proposals that cost in the order of 65.000 EUR for the design phase, 700.000 EUR for the prototyping and 105.000 EUR for the testing phase would allow this specific challenge to be addressed appropriately. Nonetheless, this does not preclude submission and selection of proposals requesting other amounts.

Important dates

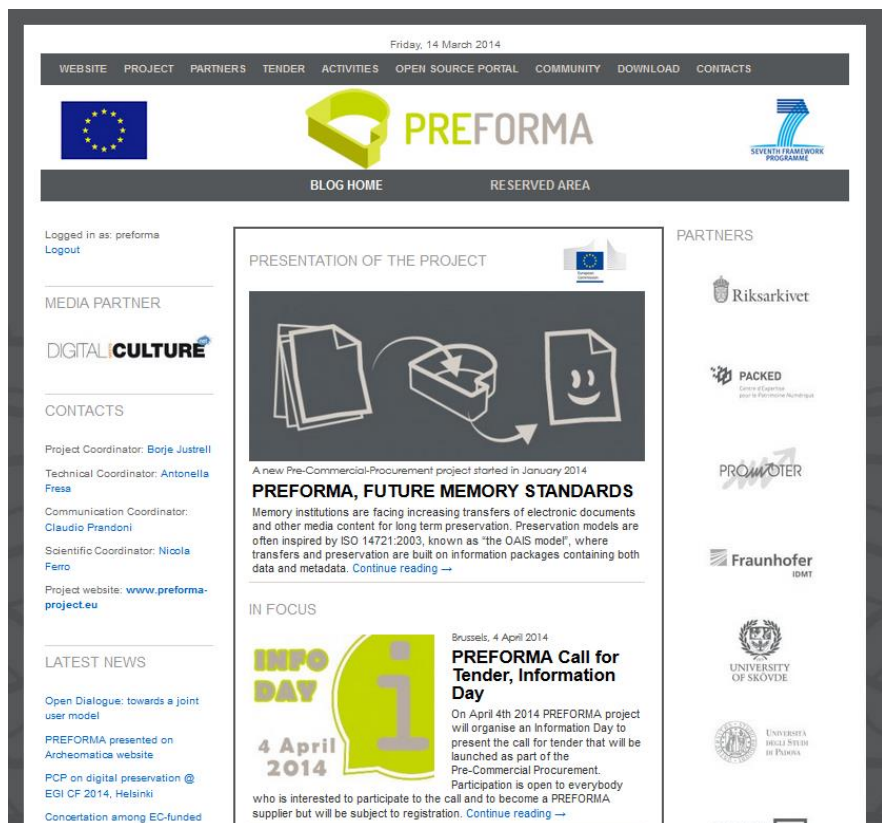


- ❑ Next Information Day: **PREFORMA Networking Session at EGI Community Forum 2014, Helsinki, 21 May 2014** - <http://www.digitalmeetsculture.net/article/preforma-egi-community-forum-2014/>
- ❑ Publication of the call: **end May 2014**
- ❑ Deadline to present the proposals: **end July 2014**
- ❑ Selection of the winners: **end September 2014**
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- ❑ Start of the work: **1st November 2014**

Follow us!

PREFORMA Website

www.preforma-project.eu



PREFORMA Blog

www.digitalmeetsculture.net/projects/preforma/



**PREFORMA Information Day
Brussels, 4 April 2014**





Thank you!

Antonella Fresa

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www.digitalmeetsculture.net