

How to participate to the tender

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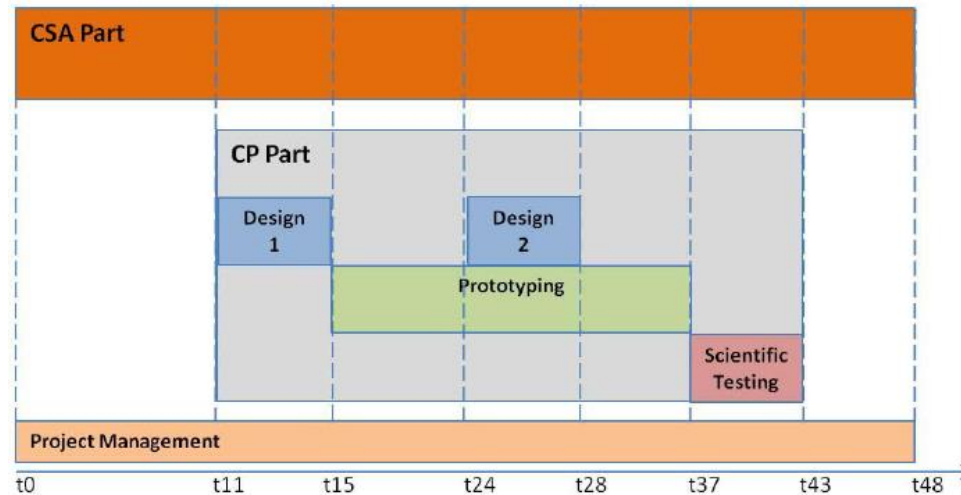
Tender schedule



	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 participate



1. Tenderers browse the TENDER section of the **PREFORMA website** (www.preforma-project.eu) 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**.

The PREFORMA Website: TENDER section



The screenshot shows the website's navigation menu with "TENDER" circled in white. Below the menu, the "TENDER" section contains a list of links on the right and detailed information on the left. The information includes a pre-announcement URL, publication date, deadline date, budget, call ID, status, and OJ reference. A "Submit a proposal" link is also present.

Navigation Menu: 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

Links: 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 Framework Agreement
- Challenge Brief 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).

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

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.

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.

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



- ❑ Publication of the call: **end May 2014**
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Follow us!



PREFORMA Website

www.preforma-project.eu

A screenshot of the PREFORMA website homepage as of Friday, 14 March 2014. The page features a navigation menu with links for WEBSITE, PROJECT, PARTNERS, TENDER, ACTIVITIES, OPEN SOURCE PORTAL, COMMUNITY, DOWNLOAD, and CONTACTS. The main content area is titled "PRESENTATION OF THE PROJECT" and includes a diagram showing a stack of documents being processed into a box and then a document with a smiley face. Below this, it states "A new Pre-Commercial-Procurement project started in January 2014" and "PREFORMA, FUTURE MEMORY STANDARDS". A sidebar on the left lists project coordinators and contact information. A "PARTNERS" section on the right lists Riksarkivet, PAKED, PROMOTER, Fraunhofer IDMT, and the University of Skövde.

A screenshot of a blog post on the PREFORMA website. The post is titled "PREFORMA, FUTURE MEMORY STANDARDS" and discusses the project's goal of implementing good quality standardised file formats for preserving data content in the long term. It mentions that the project is a new Pre-Commercial Procurement (PCP) project started on January 1st, 2014, and co-funded by the European Commission. The post also includes a "UPCOMING EVENTS" section for "BRUSSELS 4 APRIL 2014 PREFORMA CALL FOR TENDER, INFORMATION DAY" and a "LATEST NEWS" section for "PREFORMA Call for Tender, Information Day".

PREFORMA Blog

www.digitalmeetsculture.net/projects/preforma/

PROMOTER
Information technology, research and innovation

DIGITAL MEETS CULTURE.net

PREFORMA Networking Session
Helsinki, 21 May 2014



Thank you!

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