



Tender Procedure and Requirements

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What is a PCP?

- ☁ A phased, competitive approach to purchasing “R&D services” for the development of innovative solutions not yet available on the market
- ☁ Risk- and benefit-sharing contracts based on a functional specification, where results are owned by the contractor
- ☁ Exemption from EU Procurement Directives for R&D services – specific legal framework for Horizon 2020 PCP actions

What are R&D services?

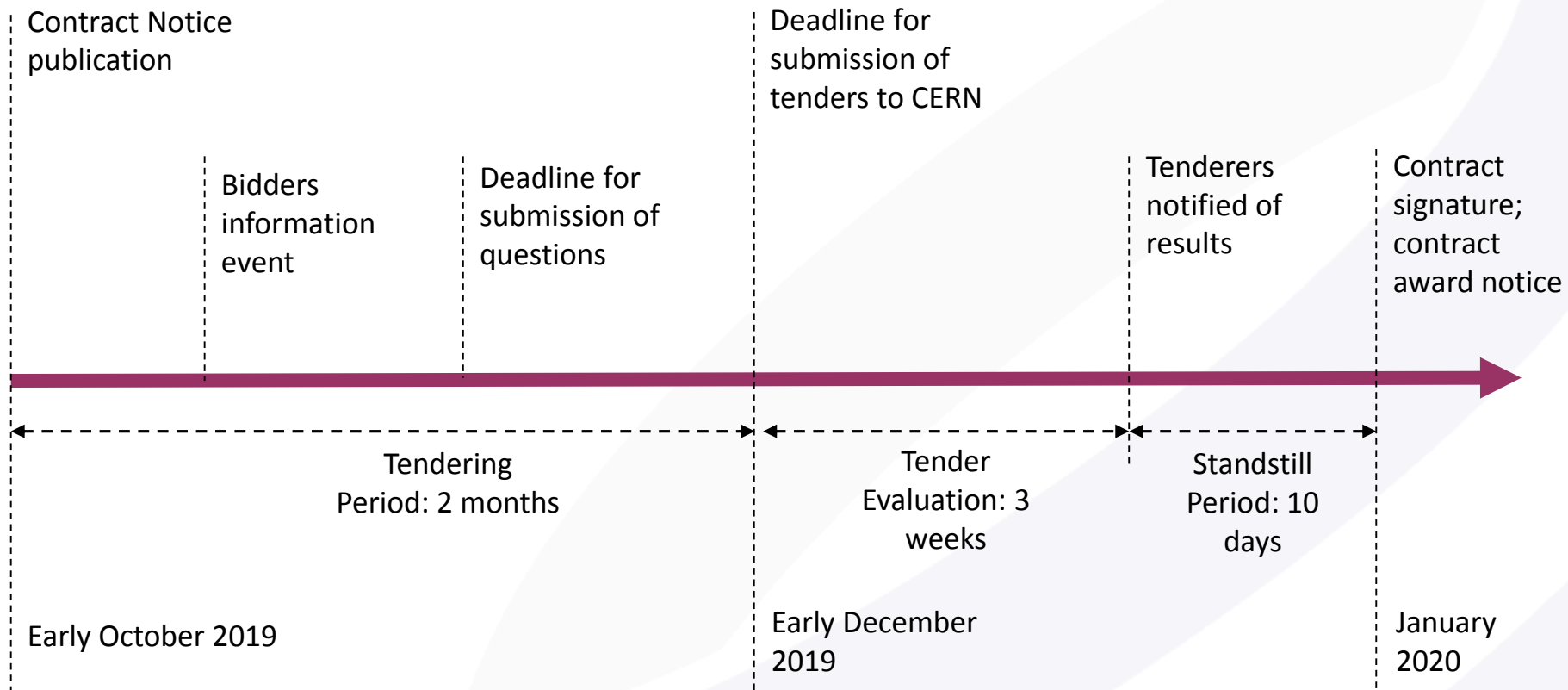
“R&D services” includes:

- ☁ exploration and design of solutions;
- ☁ prototyping up to the original development of a limited volume of first products or services in the form of a test series;
- ☁ limited production or supply in order to incorporate the results of field-testing and to demonstrate that the product or service is suitable for production or supply in quantity, to acceptable quality standards;

“R&D services” does not include:

- ☁ quantity production or supply to establish commercial viability or to recover R&D costs;
- ☁ commercial development activities such as incremental adaptations, integration, customisation, or routine or periodic changes to existing products, services, production lines, processes or other operations in progress.

Tendering Procedure



Tendering Procedure

- ☁ The Request for Tenders will be published on the [ARCHIVER project website](#) and the contract notice announced in the OJEU via TED
- ☁ Tenderers shall submit Tenders via CERN's e-Procurement platform. Instructions for use will be included in the Request for Tenders. You will need to create a lightweight account ([here](#))

Draft Tender Documents

- ☁ Draft tender documents are available at the [project website](#)
- ☁ Some documents are provided for consultation and your feedback is requested to help us scope the R&D challenge, feasibility and risk
- ☁ Some documents are provided for information to give you advance visibility of the project requirements

Disclaimer

- ☁ Draft documents (and therefore the details in these slides) are subject to further review and might change in the final published tender
- ☁ In any case, the published tender documents prevail

Eligible Tenderers

- ☁ Single Contractors

- ☁ Consortia, consisting of:

- ☁ A Lead Contractor

- ☁ Other Consortium Members signing a Power of Attorney in favour of the Lead Contractor

- ☁ In both cases, subcontracting is permitted

- ☁ A Single Tenderer or Lead Tenderer cannot participate in another Tender (including as a Consortium Member or subcontractor)

Tender Requirements: Overview

- ☁ The *Tenderer* shall comply with two sets of criteria:
 - ☁ Exclusion criteria (see Annex 1)
 - ☁ Selection criteria (see Annex 2)
- ☁ The *Tender* shall comply with compliance criteria (see Annex 3)
- ☁ A quality score will be attributed to the Tender based on award criteria (see Annex 4)
 - ☁ Failure to meet minimum specified quality scores shall result in the Tender being deemed non-compliant

Exclusion Criteria (Annex 1)

- ☁ The exclusion criteria must be met by each member of the consortium and all subcontractors
- ☁ Exclusion criteria relate to:
 - ☁ No criminal activity, fraud, etc.
 - ☁ No bankruptcy or insolvency proceedings
 - ☁ No conflict of interest
- ☁ Exclusion criteria will be evaluated on a pass/fail basis

Selection Criteria (Annex 2)

- ☁ The selection criteria must be met by the Tenderer
- ☁ For consortia, it will be specified whether each member of the consortium or the members of the consortium collectively have to meet the criterion
- ☁ The subcontractors are not concerned by selection criteria
- ☁ Selection criteria will be evaluated on a pass/fail basis

Key Selection Criteria

- ☁ Capacity and experience to perform R&D
- ☁ Competence and experience in the domains of cloud computing and data preservation and archiving
- ☁ Ability to protect and commercialise the Results
- ☁ Sufficient financial capacity, insurance, and contract management experience

Key Selection Criteria

☁ Operational ability to:

- ☁ offer digital storage capacity in the PB range

- ☁ offer multi-tenancy architectures

- ☁ establish a Wide Area Network connectivity with GEANT, based on specific minimum bandwidth requirements

☁ Certification or evidence of best practices for the relevant ISO/IEC Information Security Management System family of standards (ISO/IEC 27001, ISO/IEC 27040, ISO/IEC-19086 or equivalent)

Compliance Criteria (Annex 3)

- ☁ The Tender must meet the compliance criteria. This will be evaluated on a pass/fail basis.
- ☁ Compliance criteria relate to PCP-specific requirements including:
 - ☁ R&D services constituting the majority of the PCP contract;
 - ☁ The majority of the R&D activities, including the principle researchers working for the PCP contract, being located in EU Member States or H2020 Associated Countries;
 - ☁ No double public funding;
 - ☁ Ethical research principles.

Award Criteria (Annex 4)

- ☁ The Tender will be given a score based on the award criteria. Response guidelines and scoring details will be provided.
- ☁ The Buyers Group will establish an evaluation committee of technical experts for this purpose. Evaluators will score the Tenders first individually, then together as a committee - by consensus wherever possible.
- ☁ For some Award Criteria, the Tender will have to meet a specified minimum score.
- ☁ Overall, the Tender will have to meet a specified minimum score.

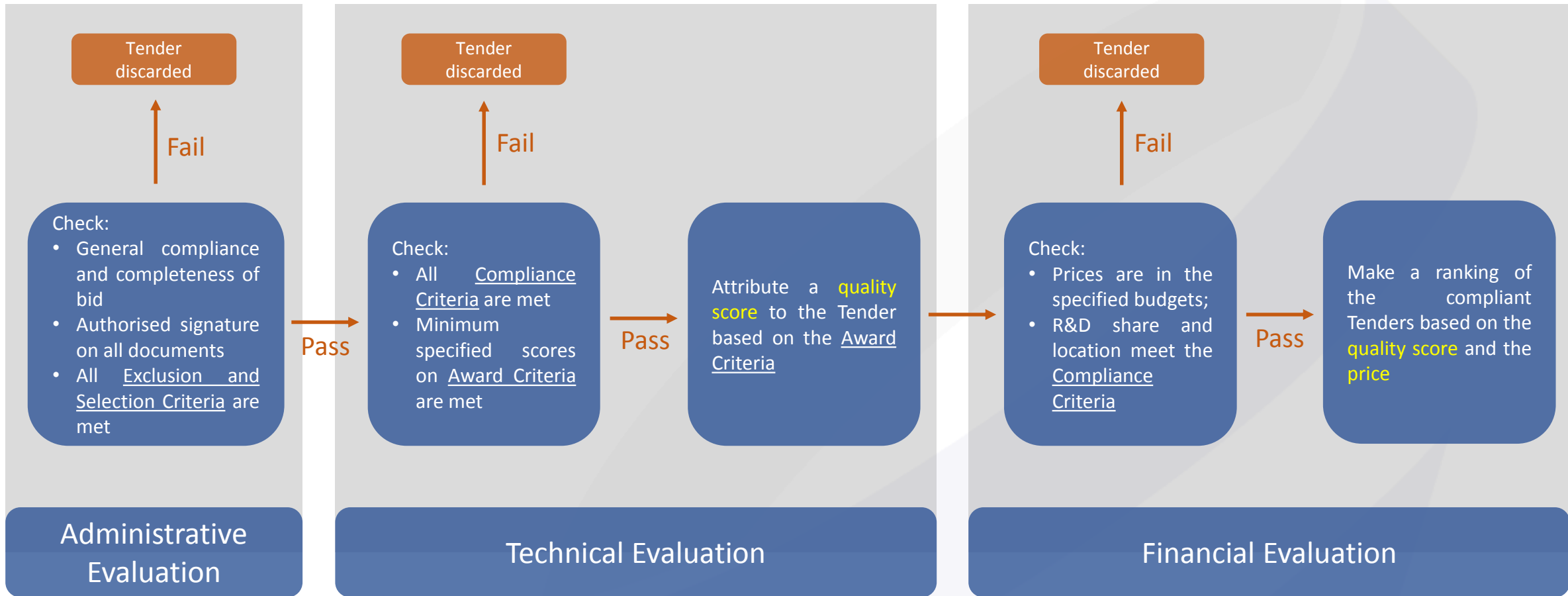
Key Award Criteria

- ☁ Proposed organisation of the contractor and the project
- ☁ Experiences and qualifications of key personnel allocated to the project
- ☁ Maturity of the commercialisation plan

Key Award Criteria

- ☁ Design based on the OAIS reference model
- ☁ Implementation of FAIR principles, covering aspects such as automatic discovery of (meta)data, persistent identifiers, limitations on data movements etc.
- ☁ Data Privacy and compliance with GDPR regulatory requirements
- ☁ Cost effectiveness and purchasing/deployment options
- ☁ Licensing model, software distribution mechanisms and Open Source

Tender Evaluation



Other Documents

- ☁ Framework Agreement
- ☁ Work Order
- ☁ Cloud Services Agreement
- ☁ Annex 5: Financial Offer
- ☁ Functional Specification
- ☁ Deliverables and Milestones

Summary

Criteria	Used to evaluate...	Apply to...	Are evaluated...
Exclusion Criteria	The basic eligibility of companies to participate in the project	<ul style="list-style-type: none"> • Single Tenderers • Each Consortium member • Subcontractor 	On a pass/fail basis
Selection Criteria	The minimum characteristics needed to participate in the project are met	<ul style="list-style-type: none"> • Single Tenderers • Each Consortium member OR the Consortium as a whole, as specified 	On a pass/fail basis
Compliance Criteria	The basic eligibility of the Tender	<ul style="list-style-type: none"> • The Tender 	On a pass/fail basis
Award Criteria	The quality score to the Tender	<ul style="list-style-type: none"> • The Tender 	According to stated scoring guidelines, with possible minimum pass/fail scores