

Solving big challenges together

Ai4Cities - Coaching Webinar
January 25th 2021



OUR MISSION

**We help people solve
big challenges together.**

Agenda

Use chat for questions during the presentation

1. Theory and practice of public bidding
2. Ai4Cities PCP application step by step
3. Hints and tips on how to make the best offer
4. Open questions





Theory and practice of public bidding

To bid or not to bid

1. Is the work offered interesting to us including
 - a. Contract and other terms
 - b. Timetable
 - c. Pricing
2. Can we win?
 - a. Exclusion criteria, selection criteria, compliance criteria - Must fulfil, no exceptions
 - b. Award criteria - Can we compete with others who are interested
 - i. Quality
 - ii. Price

SOMETIMES IT'S WISEST NOT TO BID AT ALL

Answer the question and only the question

1. Especially important in pass or fail questions like “do you have a conflict of interest?” or “Do you fulfil the capacity requirements?”
 - a. No, we don't have conflicts of interest
 - b. Yes, we fulfil the capacity requirements. We have attached six CVs.
2. Under no circumstances put any demands, reservations or conditions to exclusion criteria, selection criteria or compliance criteria
 - a. This will most likely get you disqualified
3. If you wish that procurement unit would make changes to the bid, suggest your changes during question period. Include very thorough arguments.
 - a. Forum Virium Helsinki via email (info@ai4cities.eu) in English up until 10.2.2021 at 17:00 CET. Any questions received after this deadline will not be answered.

Argumentation is very important

1. Especially important in the award criteria, where your application or bid is scored e.g.
 - a. Our solution reduces CO2 emissions, BECAUSE
 - b. Based on our calculations reduction is 20%. (Attach your calculations)
2. Everything you claim should be have some kind of justification or rationalization.
 - a. If estimate, then how did you estimate
 - b. If assumption, then why do make such assumption
 - c. Business plans, technical and scientific documentation

Public procurement is fair and equal

1. Same information to everyone at the same time
2. Selection criteria announced beforehand and selections made based on that criteria
3. Does NOT mean terms and criteria are favorable to everyone
4. Does NOT mean you will get mercy, if your papers are filled wrong.

An aerial photograph of a port area with several large cranes and a city skyline in the background. The cranes are white and red, and the city buildings are various colors. The water is in the foreground. The text "Ai4Cities PCP application step by step" is overlaid in white on the image.

Ai4Cities PCP application step by step

Tender_document_1_-_AI4Cities_Request_for_Tender

All of the crucial information

- You should read it all except perhaps
 - the other track
 - subcontraction if you are not using
 - ...
- Don't forget the appendixes

Ai4Cities bid must include these

1. Form_A_-_General_Tender_Submission_and_PoA
2. Form_B_-_Exclusion_Criteria
3. Form_C_-_Selection_Criteria
4. Form_D_-_Compliance_Criteria
5. Form_E_-_Technical_Offer_Phase_1_-_Final
6. Form_F_Financial_Price_Break_AI4Cities
7. Form_G_Financial_Offer_Phase_1_-_Final
8. Form_H_-_Executive_Summary_-_Final

Form_A_-_General_Tender_Submission_and_PoA

Consortium vs single tenderer

- In both cases you can have subcontractors
- Difference is...
 - “I am fully aware that the Consortium members are jointly and severally liable to Forum Virium Helsinki for the execution of the Contracts.”
- 3. Fill statement A OR B!!!
- Need statement or declaration from all consortium member and subcontractors

Form_B_-_Exclusion_Criteria

Public procurers are required by law to make sure that the service providers are paying taxes and take care of other similar obligations. If you are chosen you will have to prove some of these things.

Read these through, but most of us will be able to answer “NO” to all.

Form_C_-_Selection_Criteria

These are asked to make sure you can provide the R&D service the buyers group is looking for. Your company and your personnel should have experience of similar R&D work. At minimum your personnel should have this experience.

- Time - Last 5 years
- Scope - similar
- Clearly linked
- Short description (Assignment/Results), Time, Scope (working days/€), Roles,...

Form_D_-_Compliance_Criteria

This part is here to help you focus on some key details of the contract. These are absolute requirements set up for this bid.

Form_H_-_Executive_Summary_-_Final

The **SAME** executive summary as in Form E.

Use of infographics and/or pictures is encouraged.

Possible to use this in wider circulation e.g. marketing or supplying information based on public information act.

Form_E_-_Technical_Offer_Phase_1_-_Final

- Choose lot (Energy/Mobility)
- Sub-challenge
- Executive summary (FR1, FR2, FR3 & NFR1)
 - Tender_document_1_-_AI4Cities_Request_for_Tender, 4.5.1 Weighted award criteria
- Project plan
- Functional Requirements
- Non-Functional Requirements
- Commercial Feasibility
- Declaration of Pre-Existing Rights
-

Argumentation is very important

1. Especially important in the award criteria, where your application or bid is scored e.g.
 - a. Our solution reduces CO2 emissions, BECAUSE
 - b. Based on our calculations reduction is 20%. (Attach your calculations)
2. Everything you claim should be have some kind of justification or rationalization.
 - a. If estimate, then how did you estimate
 - b. If assumption, then why do make such assumption
 - c. Business plans, technical and scientific documentation

Form_E_-_Technical_Offer_Phase_1_-_Final

The AI4Cities partners do not expect Suppliers to already have all these features in place when submitting their tender; this work is part of the R&D process.

In the Technical Offer (via Form E), Suppliers need to make clear how they intend to achieve the must haves and (if any) how they will implement the nice to haves.

These explanations will be appraised by the Technical Evaluation Committee, assisted by a panel of external experts.

Form_E_-_Technical_Offer_Phase_1_-_Final

The Technical offer will not be evaluated on a pass/fail basis: failure to (sufficiently) describe the “must haves” are therefore not a reason to be excluded from this tender, but will merely lead to lower evaluation scores.

The evaluation will be assessed based on the following criteria. The model Appendix 3 “Scoring Model for the Award Criteria” will be used to assess and score the extent to which a Tender meets the award criteria.

Form_E_-_Technical_Offer_Phase_1_-_Final

WORKSHOP: COMMERCIAL FEASIBILITY (CF 5)

With the business plan there should also be an initial market analysis. The market analysis should include:

- Preliminary assessment of the market potential of the solution in both the pilot regions as well as on an European scale
- A brief analysis on the competition

Lastly, describe the added value of the AI4Cities solution compared to the current state-of-the-art on the market

Form_E_-_Technical_Offer_Phase_1_-_Final

WORKSHOP: COMMERCIAL FEASIBILITY (CF 5)

With the business plan there should also be an initial **market analysis**. The market analysis should include:

- **Preliminary assessment of the market potential of the solution** in both the **pilot regions** as well as on an **European scale**
- A **brief analysis** on the **competition**

Lastly, describe the **added value** of the AI4Cities solution **compared to the current state-of-the-art on the market**

Form_E_-_Technical_Offer_Phase_1_-_Final

Assessment	Description	Score
Outstanding	The response exceeds the requirement providing significant added value to it, which is described very convincingly.	10
Excellent	The response fully meets the requirement and the provided explanation is very convincing.	9
Very good	The response addresses the requirement very well, but a small number of inconsistencies, or minor shortcomings are present.	8
Good	The response addresses well the requirement in most respects and provides certain information which is relevant, but a small number of shortcomings are present.	7
Fairly good	The response meets the requirement in certain material respects and provides certain information which is relevant, but which is lacking or inconsistent in material respects, or a number of shortcomings are present.	6

Form_E_-_Technical_Offer_Phase_1_-_Final

WORKSHOP: COMMERCIAL FEASIBILITY (CF 5) - **market analysis**

How to exceed the requirement in this case? Provide added value?

“The response exceeds the requirement providing significant added value to it, which is described very convincingly.”

- **Preliminary assessment of the market potential of the solution** in both the **pilot regions** as well as on an **European scale**

Form_E_-_Technical_Offer_Phase_1_-_Final

WORKSHOP: COMMERCIAL FEASIBILITY (CF 5) - **market analysis**

How to exceed the requirement in this case? Provide added value?

“The response exceeds the requirement providing significant added value to it, which is described very convincingly.”

- A **brief analysis** on the **competition**

Form_E_-_Technical_Offer_Phase_1_-_Final

WORKSHOP: COMMERCIAL FEASIBILITY (CF 5) - **market analysis**

How to exceed the requirement in this case? Provide added value?

“The response exceeds the requirement providing significant added value to it, which is described very convincingly.”

Lastly, describe the **added value** of the AI4Cities solution **compared to the current state-of-the-art on the market**

Form_F_Financial_Price_Break_AI4Cities

- The financial offer is presented with the approval of all Tender participants
- I have read thoroughly and acknowledge the conditions and general instructions listed in this form's section 2
- I have completed Section 3 - Presenting an estimation of the solution's market price and the Binding unit prices for the entire duration of the Framework Agreement
- I have completed section 4 - Binding costs for Phase 1 (Actual and Virtual)
- I have completed section 5 - Estimated costs for Phase 2 (Actual and Virtual)
- I have completed section 6 - Estimated costs for Phase 3 (Actual and Virtual)

Form_G_Financial_Offer_Phase_1_-_Final

Total Price in EURO (“Actual price”) for Phase 1 (excluding 24% VAT).

- Tender_document_1_-_AI4Cities_Request_for_Tender, Appendix 4 - Scoring Model for the Price
 - Points awarded = Weight awarded to Price * (Price lowest tender/Price Tender Phase 1)

However, all unit prices presented by the Tenderer are binding for the duration of the Framework Agreement, i.e. they may not be changed in between phases.

An aerial photograph of a port area. In the foreground, a large concrete pier or barge is visible, with several tall, white lattice cranes mounted on it. The cranes are positioned at various angles, some facing the water. In the background, a dense urban landscape is visible, featuring a mix of residential and commercial buildings, a prominent white dome, and a tall, thin tower. The sky is overcast and grey. The text "Hints and tips on how to make the best offer" is overlaid in white, bold, sans-serif font across the middle of the image.

Hints and tips on how to make the best offer

Use the given criteria to your benefit

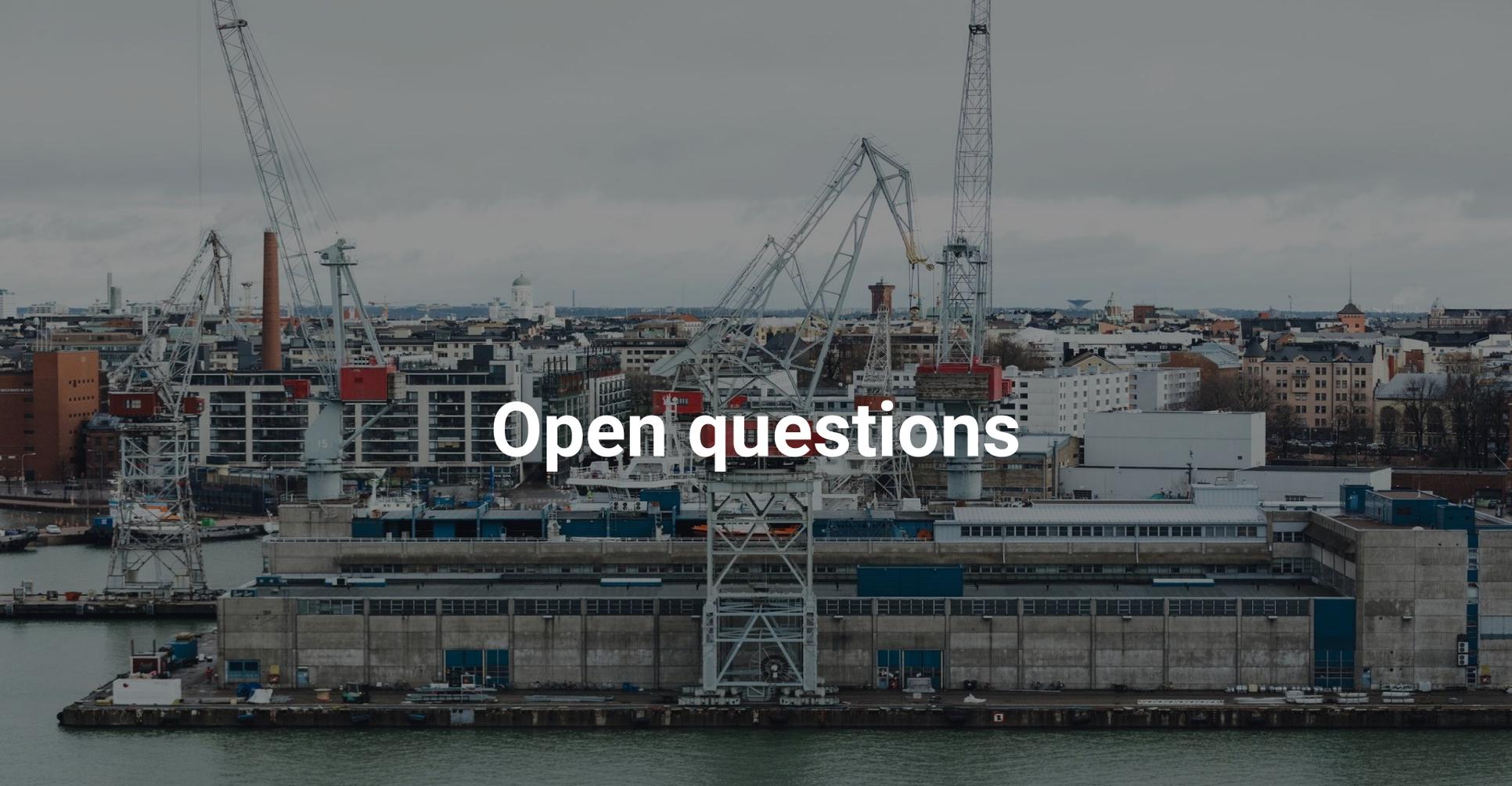
1. Often when making a bid you don't know, what exactly is the customer looking for. Now you do.
2. Make sure you answer all the questions and take into account the scoring model
 - a. Outstanding - The response **exceeds the requirement** providing **significant added value** to it, which is **described very convincingly**. - 10
 - i. What is the requirement? Exceed it in some way. Explain how you are exceeding it.
 - ii. What added value are you providing? Explain why it is significant.
 - iii. Is your description very convincing? Argument and reasoning!!!

Don't work alone. Get help.

1. Get someone meticulous/pedantic to evaluate your bid.
2. Show them the criteria and scoring model.
3. Ask them to evaluate what your bid is missing.
4. Repeat, repeat, repeat

Reserve enough time.

1. Writing a good bid takes time and diligence.
2. Bad bids are not worth making.
3. If you don't have the time, don't make a bid.

An aerial photograph of a port area. In the foreground, a large concrete pier extends into the water, with several tall, white lattice cranes. The middle ground shows a large, multi-story industrial building with a flat roof and many windows. In the background, a city skyline is visible under a cloudy sky, featuring various buildings and a prominent white dome. The text "Open questions" is overlaid in the center of the image.

Open questions

Reminder

For further questions, you may contact the lead procurer Forum Virium Helsinki via email (info@ai4cities.eu) in English up until 10.2.2021 at 17:00 CET. Any questions received after this deadline will not be answered.

The official tender closing time will be: 28 February 2021 at 17:00 CET. Tenderers can submit an offer via the Tender Submission Form on ai4cities.eu website.



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