Technical Application Training

18th of January 2024 | 11:00 – 13:00 (CET)

This project has received funding from the European Union’s Horizon Europe under Grant Agreement n° 101092208.
**Technical: Questions, slides etc.**

All information will be shared

---

**DURING EVENT**

**Video, microphone, recording**

- This meeting is **recorded** (with Q&A)
- Video and mics will be opened for participants at the end
- Please unmute yourself and turn on video when speaking

**Networking**

- Present yourself in Chat with name, what you “offer”, contact details
- Register on the Matchmaking Platform on [https://circularpsp.eu/](https://circularpsp.eu/)
- Someone has to make the first step ... so contact people (all you could hear is a no)

**Questions**

- Ask anytime using Q&A function (not Chat!)
  - We try to pick up on questions during presentation to degree possible
  - If we do not, there is a very good chance your question will be answered on slides
- Q&A will be live following questions and questions asked live
- Critical / new questions are added to FAQ on website and announced publicly
- Q&A are recorded

---

**AFTER EVENT**

**Presentation**

- Slides will be shared on website: [https://circularpsp.eu/](https://circularpsp.eu/)
  - All registered will be notified via mail

**Information**

- All are invited to the newsletter and social media channels – any critical changes to tender or FAQ will be shared
- Interested Cities, organisations and other Procurers who are not part of our Network can become Followers
Above all: this is the second of multiple events

Objectives

To explain core principles and terminology of the tender

To explain expected outcome during the Project (TD1 Section 2.1)

To explain what is required in the tender: TD2 Challenge Brief

To explain how TD2 and application Template TD6 are connected
Tender Summary
Overview of Tender Documents
Tender documents (TDs) overview

We did our best to make it transparent and avoid duplication, however, it is a large contract and will be some effort.

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call for Tenders</td>
<td>Central documents on conditions, content and challenge</td>
<td>TD1 Call for Tender&lt;br&gt;TD2 Challenge Brief (includes Annexes)</td>
</tr>
<tr>
<td></td>
<td>Administrative Forms to be filled by tenderers</td>
<td>TD3a Declaration of Honour - Exclusion Criteria&lt;br&gt;TD3b Declaration of Honour – On/off Award Criteria&lt;br&gt;TD4 Power of Attorney</td>
</tr>
<tr>
<td>Proposal to be submitted</td>
<td>Application Templates to be filled by tenderers</td>
<td>TD5 Tender Application Template – Administrative&lt;br&gt;TD6 Tender Application Template – Technical&lt;br&gt;TD7 Tender Application Template – Financial</td>
</tr>
<tr>
<td></td>
<td>Application Submission</td>
<td>TZ1 Tender submission zip-archive</td>
</tr>
<tr>
<td>Project</td>
<td>Contract Templates to be signed by successful contractors</td>
<td>TD8 PCP Framework Agreement&lt;br&gt;TD9 PCP Specific Contract for Phase I-II-III</td>
</tr>
</tbody>
</table>
Tender documents (TDs) overview

Today's webinar focuses on TD2, TD6 and a section of the TD1

* See full detail in Section 4.1 of TD1 Call for Tenders
Expected outcomes during Project

Section 2.1 in TD1
Core outputs across phases

Each supplier will design, develop and test the outputs across all areas which constitute the CE-solution

R&D PROGRESS THROUGHOUT PROJECT

<table>
<thead>
<tr>
<th>Need area</th>
<th>Outputs (simplified, see TD1 – 2.1.2 for detail)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>AI (CE Taxonomy is developed jointly)</td>
</tr>
<tr>
<td>Operation</td>
<td>CE Mission, CE Workflows, CE Indicators</td>
</tr>
<tr>
<td>Organisation</td>
<td>Public Service Platform (PSP), communication and networking</td>
</tr>
<tr>
<td>Change</td>
<td>Change Framework, self-assessment tool, Upskilling, knowledge and wisdom creation</td>
</tr>
</tbody>
</table>

CONTENT OF SECTIONS

- **Phase I**
  Solution Design (See: TD1 – 2.1.3)
  - Development of critical components

- **Phase II**
  Prototype Development (See: TD1 – 2.1.4)
  - Core components (v1) and integrated operational system (v2)

- **Phase III**
  Development & Testing of Pilot Systems (See: TD1 – 2.1.5)
  - Demonstration of Pilot Systems at each demonstration site*

* See Table 4 in Section 2.1.4 of TD1 Call for Tenders for more info on the demonstration sites in Phase III
Table 1 (of TD1) describes the progress on R&D documented in the deliverables depicted below.

**Deliverables**

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Call for Tender</th>
<th>Phase I</th>
<th>Phase II</th>
<th>Phase III</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Solution Design</td>
<td>Prototype Development</td>
<td>Development &amp; Testing of Pilot Systems</td>
<td></td>
</tr>
</tbody>
</table>

**Expected outcomes**

- **M2.4 CE solution**
  - **Phase I** Solution Design
  - **Phase II** Prototype Development
  - **Phase III** Development & Testing of Pilot Systems

**Graphic represents evolution of key documents to be delivered**

**TD1 Table 1 describes the progress on CE-solution (i.e. AI, Workflows, Platform, Change)**
TD2 Challenge Brief

Common challenges of cities to transition to Circular Economy
Desired Innovations (simplified)

The areas of need require digital innovation and CE expertise

- AI using taxonomies, NLP
- Circular Missions & Workflows
- Public Service Platform
- Change & Upskilling
  - Capacity-building and training
- Operation
  - Information
  - Organisation
CircularPSP is technology neutral

Our focus is to describe the actual problem – you need to come up with technical and practical solutions

Buyers Group defined a (very complex) problem and award criteria

Suppliers define the solution

...any constellation of technologies is thinkable if it fulfills design principles and requirements etc. ...
Technical Application Template TD6
Structure of Weighted Award Criteria in TDs
The Challenge = tender: TD2

The Challenge is structured along the Award Criteria as is the tender/proposal you are going to write

<table>
<thead>
<tr>
<th>(Weighted) Award Criteria</th>
<th>Challenge Brief</th>
<th>Tender Application Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Technical criterion</td>
<td>1 Technical criterion</td>
<td>1 Technical criterion</td>
</tr>
<tr>
<td>T1 – Overall approach to CE-solution</td>
<td>T1 – Overall approach to CE-solution</td>
<td>T1 – Overall approach to CE-solution</td>
</tr>
<tr>
<td>T2 – Information</td>
<td>T2 – Information</td>
<td>T2 – Information</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

TD1 Call for Tenders, Section 3.4 and 3.5 include:
- Maximum points
- Thresholds & weights
- Assessment scheme
- Formulas

TD2 Challenge Brief includes:
- Challenge description for each criterion
- Minimum requirements as Must or in bold (in bullet lists)
- Aspects relevant for assessment
- Annexes

TD6 Tender Application Template - Technical includes:
- Pre-defined sections, sub-headings and some standardised tables
- Notes on content expected
**Weighted Award Criteria & Price Quality Ratio**

CircularPSP defined three weighted award criteria accompanied with 10 sub-criteria and a price quality ratio of 90-10

<table>
<thead>
<tr>
<th>Weighted award criteria for Phase I</th>
<th>Maximum points</th>
<th>Threshold</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Technical Criterion</strong></td>
<td></td>
<td></td>
<td>50%</td>
</tr>
<tr>
<td>T1 – Overall approach to CE-solution</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T2 – Information</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T3 – Operation</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T4 – Organisation</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T5 – Change and Upskilling</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total for technical criteria</strong></td>
<td>100</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td><strong>Commercial Feasibility Criterion</strong></td>
<td></td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>CF1 – Innovativeness compared to market SOA</td>
<td>55</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>CF2 – Business Model</td>
<td>45</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CF3 – Commercialisation Plan*</td>
<td>-*</td>
<td>-*</td>
<td></td>
</tr>
<tr>
<td><strong>Total for commercial feasibility criteria</strong></td>
<td>100</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td><strong>Project Management Criterion</strong></td>
<td></td>
<td></td>
<td>30%</td>
</tr>
<tr>
<td>PM1 – Quality and completeness of the work-plan as well as detail of task and result descriptions</td>
<td>45</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>PM2 – Feasibility of plan and resources to meet the objectives</td>
<td>55</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total for project management criteria</strong></td>
<td>100</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td><strong>Overall score for tender</strong></td>
<td>100</td>
<td>50</td>
<td>100%</td>
</tr>
</tbody>
</table>

* Commercialisation Plan is only applicable for the call-offs for Phase II and III. See full detail in Section 3.4 & 4.5 of TD1 Call for Tenders
Next steps and Q&A
Tender Events (online)

CircularPSP organises a Tender Launch Event, one training focused on the tech. part and one training on admin/finance parts

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Time</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender Launch Event</td>
<td>11 January</td>
<td>11.00 - 13.00 (CET)</td>
<td>Presentation and recording</td>
</tr>
<tr>
<td>Technical Application Training</td>
<td>18 January</td>
<td>11.00 - 13.00 (CET)</td>
<td>Presentation and recording</td>
</tr>
<tr>
<td>Administrative &amp; Financial Training</td>
<td>25 January</td>
<td>11.00 - 13.00 (CET)</td>
<td>Registration</td>
</tr>
<tr>
<td>Open sessions for questions</td>
<td>15 February + TBD</td>
<td>10.00 - 14.00 (CET)</td>
<td>Open</td>
</tr>
</tbody>
</table>

**Phase I** May ‘24 – Sep. ‘24  
**Phase III** Jun. ‘25 – May. ‘26
Suppliers are invited to create a consortium

Search of partners is supported with the Matchmaking Platform

**MATCHMAKING**

- Become visible among other suppliers looking for partners
- Steps, describe:
  - What you are looking for
  - What you are offering
  - Some basics + contact information
- Completing the form takes only ~5 minutes
- We encourage companies that cannot cover the whole CircularPSP solution to team up with other companies and apply together with international partners in a joint tender (consortium).

**PLATFORM**

- Location: [https://circularpsp.eu/matchmaking/](https://circularpsp.eu/matchmaking/)
You have been added to a “supplier newsletter” but great if you subscribe beyond 1.4.24

Read and do some form of gap analysis

Build consortium asap

Create an outline and concept – write and iterate

Ensure all formal steps & submit in time
Procurers are also busy

- We answer your questions
- We prepare the evaluation (also during project)
- We grow & inform the Follower Network > if you are a city, write in Chat / any of us
- We work on the CE Taxonomy
- We inform about results early May – Phase 1 starts a couple of weeks after information
We go through Q&A

We unmute everyone – please raise hand

Ask anything – sometimes we will refer to a section or upcoming event

Any new question will be added to FAQ

Recording stops now
This project has received funding from the European Union’s Horizon Europe Pre-Commercial Procurement Programme, under Grant Agreement n° 101092208.

The sole responsibility for the publication lies with the editor and does not necessarily reflect the opinion of the European Commission. The European Commission is also not responsible for any use that may be made of the information contained herein.