Supporting Research Information Management systems in Ireland

1 PROBLEM

Research performing institutions need to manage information on research to monitor grants, track outputs and identify research strengths. Many Current Research Information Systems (CRIS) are available to support these actions including Elsevier's Pure, Converis, Dimensions, Worktribe and Sympletic Elements. Institutions typically procure these systems individually, however some countries such as Italy have pursued a national approach with a single system.

As part of its remit, HEAnet's Brokerage Team aggregates demand within its clients and runs procurements on their behalf. The resulting agreements give better terms than would otherwise be possible in addition to saving time, effort and money for clients.

HEAnet established a national *cRIS procurement framework. The purpose of this framework agreement is to allow HEAnet and its member institutions to purchase cloud/managed hosted CRIS services, including support and value-added services.

*cRIS = Research Grant Management / Current Research Information Systems and Associated Services & Support

2 APPROACH

HEAnet consulted with institutions to understand the main systems in use and the common requirements across the sector. Around half of Irish institutions are still using homegrown solutions. However, similar to other countries, several of the larger institutions have invested in formal CRIS systems. In collaboration with these clients, HEAnet identified the key service providers they could liaise with.

HEAnet ran a series of market engagement sessions with providers. This investment of time helped all as providers could inform the project team on the current state of the market.

The call to tender focused on qualitative elements to enable institutions to assess options mainly based on service quality. This approach aims to move away from cost being such a dominant factor in the evaluation process.

The qualitative elements focused on the following:

A. Infrastructure
B. Integration, Professional and Training services
C. Onboarding services and Exit Strategy
D. Support
E. Upgrade and release management
F. Functionality
G. Cost

The award criteria were based on these seven requirements. The above A:F criteria were each awarded 10-16%, while cost (G) accounted for 30% of the overall score. Tenderers were required to achieve a minimum rating of 41% of the marks available for each of the qualitative criterion (A:F) in order to avoid elimination from the competition.

3   OUTPUTS / OUTCOMES

Six providers were admitted to the framework: Clarivate, Digital Science, Elsevier, Smartsimple, Vidatum and Worktribe.

The Framework supports a direct award mechanism, light weight mini tender and full mini tender process.

A sample institution is included as part of the technical specification. This allows institutions to assess the relative pricing for the specific set of services and features they require.

The sample institution description includes users, research grants, storage, training and system integration requirements. Providers are asked to calculate costs for initial setup, licensing, consultancy, project management, training and maintenance. Day rate costs are also included.

All prices quoted by Service Providers in response to the Tender are maximum prices for the framework duration for both the sample institution and any additional services purchased.

The framework initial term is to 31 March 2024 with the right to extend by four 12-month periods. This is an important factor as it provides continuity for institutions. With a CRIS being such a complex system requiring integration to many other systems, you need to allow for a reasonable lead-in/out time. A typical CRIS setup cycle could take 18-24 months.

For more information
Research Information System/Grant Claims Management:
bit.ly/3kwmjxl

ADVICE

Liaising with service providers early via market engagement exercises definitely helps to front-load issues and lead to a smoother signing of the Framework.

A multi-supplier multi-lot lotting strategy has proven to be very successful for the sector.

If there is sufficient demand from other NRENs to adopt a similar approach, the paperwork to establish this procurement framework could be genericised and shared via GÉANT to enable uptake in other countries. Since many of the providers operate in multiple territories, NREN's issuing similar tender document bundles would further streamline the procurement process.