

Request for Proposal (RFP)

# **SELECTION OF A PARTNER FOR BUSINESS INTELLIGENCE AND DATA ANALYTICS**

Zurich, 21.04.2023

# Content

<b>LIST OF ABBREVIATIONS</b>	<b>4</b>		
<b>1. INTRODUCTION</b>	<b>5</b>		
1.1. Introduction, Purpose of the Document	5	4.6.	Expectations of responsibilities 22
1.2. Switzerland Global Enterprise	5	4.6.1.	Strategic Advisory & Forward Thinking 22
1.3. Contracting Authority	6	4.6.2.	Sprint Planning & Coordination 23
1.4. Legal Principles and Reservations	6	4.6.3.	Maintenance & Monitoring 23
<b>2. CURRENT SITUATION AND VISION</b>	<b>7</b>	4.6.4.	Infrastructure Improvements 23
2.1. Introduction and expectations for cooperation	7	4.6.5.	BI Basics & Hindsight Use Cases 23
2.2. BI Product within S-GE	7	4.6.6.	Insight & Foresight Use Cases 24
2.2.1. Definition of a product at S-GE	7	4.7.	Inputs regarding scope of the described services and budget development 24
2.2.2. Definition BI product	7	<b>5. ADMINISTRATIVE</b>	<b>26</b>
2.2.3. Roles & responsibilities BI product team	7	5.1.	Client / Contact 26
2.2.4. Current and target team setup	9	5.2.	Tender Schedule and Binding Deadlines 26
2.3. Working mode and collaboration	9	5.2.1.	Formal Requirement of Submission of Requests to Participate 27
2.3.1. Working Mode	9	5.2.2.	Questions on the Tender Document 27
2.3.2. Collaboration and tools	10	5.2.3.	Presentation 27
2.4. BI Strategy	11	5.2.4.	Contract conclusion 27
2.4.1. Mission & Vision	11	5.3.	Duration of the Contract 27
2.4.2. Guiding Principles	11	<b>6. GENERAL REQUIREMENTS</b>	<b>28</b>
2.4.3. From Hindsight to Insight & Foresight	11	6.1.	General Remark 28
2.5. Current Situation & Aspired Vision	13	6.2.	Structure of the Offer 28
2.6. Technology	13	6.3.	Cases 29
2.7. Data	14	6.3.1.	Case 1: Dashboard & Reporting Landscape (BI Basics + Hindsight) 29
2.8. Organization	15	6.3.2.	Case 2: Infrastructure Improvement 30
2.9. Use Cases	16	6.4.	Applicable Legislation 31
2.10. High-Level Strategy-Roadmap	17	6.5.	Pre-referral and Prejudice 31
<b>3. TECHNICAL SOLUTION OVERVIEW</b>	<b>18</b>	6.6.	Language of Procedure 31
<b>4. SCOPE OF TENDER</b>	<b>21</b>	6.7.	COMPENSATION / PITCH FEE 31
4.1. Description of services requested	21	6.8.	PARTIAL OFFERS 31
4.2. Type of collaboration/work	21	6.9.	VARIANTS 31
4.3. Out-of-scope and delimitations	21	6.10.	DIVISION INTO LOTS 31
4.4. Required Roles and Experience	22	6.11.	SUBCONTRACTING 31
4.5. Collaboration Model	22	6.12.	BIDDING CONSORTIA 31

6.13.	Financial Information_____	31
6.14.	RESERVATION AND CONFIDENTIALITY _____	32
6.15.	EXCLUSION CRITERIA _____	32
6.16.	ADDITIONS TO THE TENDER DOSSIER_____	32
6.17.	MODIFICATIONS AND WITHDRAWAL OF OFFERS_	32
6.18.	VALIDITY OF THE OFFER _____	32
6.19.	Information on legal remedies_____	32
6.20.	Place of Jurisdiction _____	32

## **7. EVALUATION AND SELECTION \_\_\_\_\_ 33**

7.1.	Selection Procedure _____	33
7.2.	Preliminary Check by S-GE _____	33
7.3.	Eligibility Criteria _____	33
7.4.	Selection Criteria_____	34
7.4.1.	General impression and expertise of provider's company (SC1)_____	35
7.4.2.	BI experience (SC2) _____	35
7.4.3.	Team Set-up & way of working (SC3)_____	35
7.4.4.	Price (SC4) _____	35
7.4.5.	Presentation (SC5) _____	36
7.5.	Rating Scale _____	36

## **8. ANNEXES \_\_\_\_\_ 37**

## List of abbreviations

Abbreviation	Definition
<b>AGB</b>	Allgemeine Geschäftsbedingungen / General Terms and Conditions
<b>BI</b>	Business Intelligence
<b>BöB</b>	Bundesgesetz über das öffentliche Beschaffungswesen / Federal law on public procurement
<b>CRM</b>	Customer-Relationship-Management
<b>D+I</b>	Value Stream “Data+Insights”
<b>D+T</b>	Division “Digital+Technology”
<b>EC</b>	Eligibility Criterion (Eignungskriterium): mandatory criteria related to contractors, failure to meet leads to immediate withdrawal from the tendering procedure.
<b>ELT</b>	Extract-Load-Transform
<b>ETL</b>	Extract-Transform-Load
<b>ERP</b>	Enterprise-Resource-Planning
<b>GATT</b>	General Agreement on Tariffs and Trade
<b>NDA</b>	Non-disclosure Agreement
<b>PD</b>	Person-days
<b>QA</b>	Quality Assurance
<b>RFP</b>	Request for proposal
<b>SC</b>	Selection Criteria
<b>SECO</b>	Schweizerisches Staatssekretariat für Wirtschaft / Swiss State Secretariat for Economic Affairs
<b>S-GE</b>	Switzerland Global Enterprise
<b>VöB</b>	Verordnung über das öffentliche Beschaffungswesen / Regulation on public procurement
<b>WTO</b>	World Trade Organization (WTO) also includes the GATT as an umbrella organisation.

# 1. Introduction

## 1.1. INTRODUCTION, PURPOSE OF THE DOCUMENT

In the interest of applying the principle of continuous service improvement and boosting the efficiency of internal processes, Switzerland Global Enterprise invites qualified and suitable companies to bid on the running, support and further development of the Business Intelligence and Data Analytics environment, taking into consideration the requirements set out herein. We are envisioning an ongoing regular partnership over the course of 5 years. The contract will be concluded for 3 years with an option of extension for 2 years.

Based on this public tender in an open procedure interested companies can participate in the procedure. The present tender documents (RFP) regulate the procedure and form of tender submission.

Switzerland Global Enterprise assumes no liability for errors in these documents.

The present specification describes the objectives which are to be pursued and achieved with the present procurement object. It serves as a basis for the present invitation to tender. The document is divided into the following categories:

- **Introduction:** Provides information on the organization Switzerland Global Enterprise and the legal principles.
- **Current Situation and Vision:** Describes the overall request, the underlying objective and vision as well as the roadmap on which the tender is based.
- **Technical Solution Overview:** Explains the technical situation.
- **Scope of tender:** Describes the requirements and expectations of Switzerland Global Enterprise as the basis for the offer but also towards the future partner.
- **Administrative:** Explains the formal offer process and deadlines.
- **General Requirements:** Describes the framework requirements for the preparation of the tender.
- **Evaluation & Selection:** Explains the criteria for the selection of the PARTNER.
- **Annexes:** Contain further documents as a template for the submission of the tender (they form an integral and formal part of the tender response).

## 1.2. SWITZERLAND GLOBAL ENTERPRISE

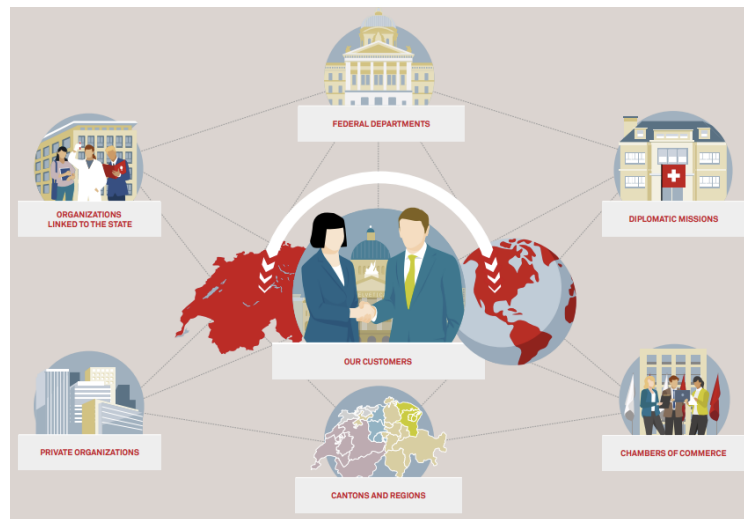
Switzerland Global Enterprise (S-GE) is the official Swiss consultancy, promotion and platform organization for export and investment promotion with around 200 employees throughout Switzerland and in 30 countries.

We support Swiss SMEs in their international business and help innovative foreign companies to establish in Switzerland. In doing so, we rely on a unique network of national and global partners. This is how we create added value for our clients and prosperity for Switzerland.

S-GE focuses on a consistent customer orientation and integrated service provision with partners. This means we are able to respond proactively to changing customer requirements and to changes in the economic and political environment, while simultaneously acting in accordance with the Confederation's foreign economic strategy and its sustainable development goals.

As a non-profit organization, we provide a public service for our clients on behalf of the Swiss Confederation (State Secretariat for Economic Affairs SECO) and the cantons. The Swiss Confederation (State Secretariat for Economic Affairs SECO) has been mandating us to promote exports since 1927, and SECO and all cantons have been mandating us to promote Switzerland as a business location since 2008. Since 2016, S-GE has in particular been promoting the export of Swiss cleantech solutions on behalf of SECO and the Swiss Federal Office of Energy (SFOE). After three pilot years (2017-2019), the marketing of Switzerland Innovation has been integrated into the investment promotion mandate. Our mandates form important pillars of Switzerland's national economic promotion and foreign economic policy. They complement each other and by fulfilling them S-GE creates synergies, based on the combined expertise for the promotion of

international business. The Liechtenstein Office of the National Economy mandates S-GE to support Liechtenstein SMEs in their international business.



### 1.3. CONTRACTING AUTHORITY

Switzerland Global Enterprise is the contracting authority for the services provided and services requested in this call for tenders and is hereinafter referred to as "S-GE".

### 1.4. LEGAL PRINCIPLES AND RESERVATIONS

This tender is open to the public (open procedure; BöB Art. 18)) and is subject to the GATT/WTO regulation. It is not a legally binding contract offer and does not create any obligations to the benefit of the recipients of this invitation to tender.

SECO and therefore S-GE awards its mandates in accordance with the Federal Act on Government Procurement (BöB) and its implementing regulations (VöB, Org-VöB). It publishes mandates above the threshold value of CHF 230,000 on [simap.ch](http://simap.ch), both to the public and across Europe. [simap.ch](http://simap.ch) is the procurement portal for the federal administration.

The submission of an offer, even if it meets all the requirements of this document, does not oblige S-GE to enter into a contractual relationship with the contractual partner, nor to provide information on the selection of the future contractual partner. However, if the offer is accepted, it will be an integral part of the contract.

The contracting authority reserves the right to award subsequent contracts relating to this contract to the successful tenderer by direct agreement.

The contracting authority reserves the right to make corrections and additions to the documents submitted within the time limit for the submission of tenders. It shall simultaneously communicate these corrections and additions in writing to all tenderers and, if necessary, extend the time limit for the submission of tenders. Tenderers must take account of these corrections and additions in their tender.

If, after the contract has been awarded, the contract is not executed in accordance with the tender or the contract, the contracting authority is entitled to revoke the award. In this case, the contracting authority reserves the right to award the contract without a new invitation to tender to the tenderer with the next best offer.

If none of the tenders submitted fulfills the criteria or requirements laid down in the tender documents, or if changed framework or boundary conditions arise, or if more favorable tenders can be expected due to the elimination of distortions of competition, or for other important reasons, the procedure may be discontinued or repeated.

The contracting authority is not obliged to accept a tender. In addition, the approval, the award and the implementation are reserved to the responsible bodies of S-GE.

All applying companies receive a confidentiality declaration with the tender documents (RFP\_BI\_Annex-01). The signed confidentiality declaration must be submitted together with the tender documents.

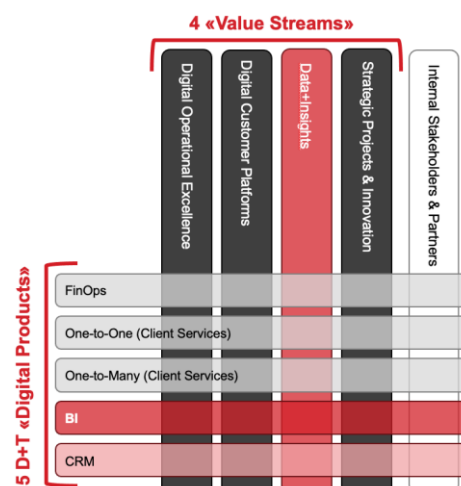
## 2. Current Situation and Vision

### 2.1. INTRODUCTION AND EXPECTATIONS FOR COOPERATION

This public tender is published by S-GE's Digital + Technology (D+T) division. The division was established in July 2022 to drive digitalization as a fundamental part of the company's strategy. As a Digital + Technology team, we shape the digital experience of employees and clients globally. The division works in four value streams: Digital Operational Excellence, Digital Customer Platforms, Data + Insights (D+I), and Strategic Projects + Innovation. Each value stream has a strategic responsibility for specific digital topics and manages digital products which continuously generate value for customers, employees and partners.

The D+I value stream is responsible for the development and maintenance of Business Intelligence (BI) infrastructure and the CRM platform to collect, manage and activate customer insights.

We are looking for a partner to complement our newly defined BI product team, capable of maintaining and developing our BI infrastructure, proposing agile solutions, and adding measurable value for our customers and business. Our goal is to establish a strong partnership with a motivated team to take our business intelligence and data analytics services to the next level.



### 2.2. BI PRODUCT WITHIN S-GE

#### 2.2.1. Definition of a product at S-GE

A digital product in terms of the D+T division is a digital service which continuously generates added value for our customers, employees and partners. A digital product team is a cross-divisional team led by a product manager to build, to roll out, to promote, to support and to continuously improve the product based on insights and feedback.

#### 2.2.2. Definition BI product

Our BI product is a comprehensive suite of digital services that deliver dashboards/reports, data analysis, and insights for S-GE's business operations. It involves strategic development and maintenance of S-GE's BI infrastructure, including data collection, data management and data activation. The primary objective of our BI product is to provide and activate customer insights in order to support and enable our business and operations teams to make better data-driven decisions, enhance customer experience, and discover new business opportunities.

#### 2.2.3. Roles & responsibilities BI product team

Following the development of our recently established BI strategy, we have carefully outlined the necessary roles and responsibilities that are vital for the successful launch of our BI product team.

To provide you with a comprehensive overview, we have created a table that outlines the various roles and responsibilities that we have identified. It's worth noting that these roles are not confined to full-time equivalents (FTEs) or limited to one person and as such, each individual can take on several roles.

Role	Role Description	Split INT/EXT	Qualifications
<b>Product Lead</b>	Leads the D+I value stream, overarching responsibility for both the BI and CRM product, aligns strategies, approves roadmaps, allocates budgets, ensures effective communication among teams and stakeholders.	100/0	Professional experience: Extensive professional experience with regards to data analysis/interpretations and BI technologies Leadership: Ability to lead interdisciplinary teams and/or project groups. Project Management: Ability to manage complex BI-projects and to effectively prioritize and allocate resources. Stakeholder Mgmt: Ability to build and maintain strong relationships with key stakeholder, incl. sr. mgmt, other divisions and ext. partners Strategic thinking: Ability to think and act strategically and ensure full alignment with corporate and divisions' strategies. Roadmapping: Product roadmapping and strategy
<b>Product Manager</b>	Represents product to stakeholders, defines strategy/roadmap, advises on use cases, works with cross-divisional teams, and manages product backlog aligned with divisions.	75/25	Project and product management: Ability to manage cross-functional teams and deliver projects on-time, using tools like Azure DevOps or JIRA. Agile methodologies: Knowledge of agile software development methodologies, such as SCRUM and Kanban. Data visualization: Knowledge of various BI platforms and tools, such as Tableau, Power BI, and LookerStudio. Roadmapping: Product roadmapping and strategy. Technical acumen: Understanding of data analysis, data warehousing, and cloud computing.
<b>Product Owner</b>	Manages tickets, sprint planning, feature prioritization, stakeholder alignment, and cross-divisional collaboration to deliver the product.	50/50	Project management: Proven project management experience Business acumen: In-depth understanding of business operations and strategy Agile methodologies: Knowledge of agile software development methodologies, such as SCRUM and Kanban. Communication: Ability to communicate effectively with stakeholders, including technical and non-technical audiences.
<b>Solution Architect</b>	Aligns architecture with strategy, designs data infrastructure, oversees implementation, and ensures scalability, security, and maintainability.	50/50	Data architecture design: Ability to create, update and maintain an innovative data architecture. Enterprise application integration: Ability to ensure effective integration with applications and business processes. Data security: Understanding of data security best practices.
<b>Developer</b>	Designs and implements storage solutions, extracts and loads data, ensures data quality, automates processing, and collaborates with analysts.	10/90	Programming: Proficiency in a programming language such as Python and SQL. Database management systems: Knowledge of database management systems like Postgres, MSSQL, and Azure, and the ability to effectively use these platforms to build and manage data processing and storage infrastructure. Database design: Understanding of database design and administration. Data security: Understanding of data security best practices.
<b>Quality Assurance</b>	Designs and executes tests to ensure accuracy and reliability of data and BI systems, and collaborates with developers to address potential defects.	10/90	QA Management: Ability to establish test planning and manage it on an ongoing basis. Agile methodologies: Knowledge of agile software development methodologies, such as SCRUM and Kanban. Bug tracking and reporting: Ability in identifying, describing and tracking bugs within the data infrastructure. Processes & Standards: Ability to develop and implement QA processes and standards.
<b>Analyst</b>	Analyses and interprets data, creates effective visualizations, develops and maintains reporting systems, and provides insights to stakeholders.	70/30	Data analysis: Ability to use data analytics tools and techniques for complex data analysis, incl. SQL. Data visualization: Proficiency in data visualization tools, such as Tableau and Power BI. Database management: Knowledge of database management systems like Postgres, MSSQL, and Azure. Data warehousing: Knowledge of star schemas, fact tables, and dimensional modeling. Programming: Proficiency in SQL and the ability to create and maintain complex data models. Business acumen: Understanding of business operations and processes.
<b>Process Owner</b>	Representative/power-user from a division. Provides 1st-level support, validates inquiries, creates backlog tickets, and analysis data.	100/0	Business acumen: In-depth understanding of business operations and processes. Agile methodologies: Knowledge of agile software development methodologies, such as SCRUM and Kanban. Data visualization: Knowledge of various BI platforms and tools, such as Tableau, Power BI, and LookerStudio.



## 2.2.4. Current and target team setup

As our organization progresses through the transition towards building an effective BI product team, we are aware of the necessity to optimize our internal resources. To that end, we have established a lean team structure where each member owns specific roles in the team. The Director of Data + Insights is taking on a pivotal role as the product lead for our BI and CRM products. However, we have recognized the need to hire a BI product manager/owner to allow our Director of Data + Insights to focus on the leadership role. Additionally, we are freeing up our Data Science Manager from organizational tasks so that he can concentrate on the technical and product-specific roles. By taking these steps, we aim to increase our internal skills and ownership of our BI Product team.

Despite our efforts to optimize internal resources, we also acknowledge that seeking external resources is essential to support our current and future roles. The fast-paced and ever-evolving nature of the BI industry requires constant learning and staying up to date with the latest technologies, which can be a challenging task for a lean team. By partnering with an external provider, we can complement our team's existing skills and knowledge and gain access to specialized expertise and resources that we may not have in-house. Our primary goal is to develop a dynamic and agile team that can rapidly adapt to changes and deliver cutting-edge BI solutions that support our business and clients.

See below for a detailed summary of our current and future team setup:

	Current setup				Target team setup after public tender				
BI Product Team	Director Data + Insights	Data Science Manager	Representatives of S-GE divisions	External Partner	Director Data + Insights	Data Science Manager	BI Product Manager/ Owner	Representatives of S-GE divisions	External Partner
	Internal	Internal	Internal	External	Internal	Internal	Internal <i>to be hired</i>	Internal	External <i>s.t. tender</i>
<i>It's important to note that the percentages do not apply to FTEs but reflect the distribution of a role and its responsibilities among one or multiple BI-Product team members (incl. ext. partner).</i>									
Product Lead	100%				100%				
Product Manager	50%			50%			75%		25%
Product Owner		50%		50%			50%		50%
Solution Architect		25%		75%		50%			50%
Developer & QA		10%		90%		10%			90%
Analyst	20%	20%	10%	50%		30%	20%	20%	30%
Process Owner			100%					100%	

## 2.3. WORKING MODE AND COLLABORATION

### 2.3.1. Working Mode

- Planning and roadmap

To ensure the successful execution of our S-GE strategy, it is crucial for the product team consisting of both S-GE and our service provider to meet on a quarterly basis. During these meetings, the product team reviews the collaboration, assesses progress on our roadmap, and identifies future opportunities. We also work together to shape priorities and determine the roadmap for the upcoming quarter, taking into account the unique needs of each division such as Finance, Digital + Technology, Export Promotion (EP), Invest Promotion (IP), and People + Culture.

- Agile sprints

The sprint team is following an iterative and agile process in sprints spanning two weeks. This means we have established sprint reviews/plannings, refinement meetings and sprint retrospectives. The work our team is focusing on each sprint is derived from the given user stories, which are aligned to the product and

project roadmaps and priorities. Every user story is enriched with multiple tasks for all stakeholders of the sprint team to work on during the sprint.

Technical maintenance, monitoring and operations related to the BI infrastructure and platform are ongoing efforts and an integrated part of the sprint.

- **Demand process**

The demand process for new requests is differentiated in three issue types:

- 1) **Projects** ( $\triangle$ large change): Technical features based on strategic project requirements
- 2) **Feature/Change Request** ( $\triangle$ medium change): Technical feature implementations and change requests of business and operations
- 3) **Bugs & Maintenance** ( $\triangle$ small/urgent effort): Technical maintenance and operations: bug fixes, minor adjustments and enhancements

The product manager/owner sources technical implementations or fixes to the corresponding party either directly or on a quarterly basis, depending on the impact and criticalness of the request. The S-GE team might address minor adjustments directly, while more significant work is assigned to the external service provider based on the affected area and required technical adjustments or enhancements.

- **Support**

1<sup>st</sup> level support (customer feedback, issue reporting, helpdesk, application of workarounds) and 2<sup>nd</sup> level support (root cause investigation, configurative adjustments) is primarily assigned to and handled by S-GE. Depending on the grade of impact or needed changes resulting from this activity, the 3<sup>rd</sup> level support is triggered through S-GE as part of an ongoing maintenance and support stream, wherever aligned however to our sprints. 3<sup>rd</sup> level support activities today include work such as supporting root cause investigations, identification of bugs and their fixing, so as solution change requests through technical adjustments.

We expect to work in the described support levels and maintenance streams with the future partner as subject to this tender.

### 2.3.2. Collaboration and tools

The primary tools we rely on as a sprint team are the following:

- Microsoft Azure DevOps (backlog, boards, sprints, etc.)
- Microsoft Teams (project channels, online meetings, etc.)
- Microsoft Sharepoint (file storage, etc.)
- Microsoft Office 365 (email, calendar, presentations, etc.)
- Confluence (currently in evaluation for documentation, etc.)
- Miro (cloud-based collaborative board)

Additional tools, sometimes specific to certain tasks or deliverables, are used where applicable and if available.

## 2.4. BI STRATEGY

During the course of Q1 2023 the newly formed BI product team defined the BI strategy with support of an external and independent Data Strategy Consultant (will not participate in the tender; not associated with the current external partner for BI).

### 2.4.1. Mission & Vision

The mission is defined based on input from various stakeholders and the overarching corporate strategy:

The mission of our Business Intelligence product is to unlock the value of data and analytics to **drive growth and enablement** for S-GE. We are committed to providing timely and accurate **insights** as well as actionable **recommendations**.

By working closely with other divisions we enable them to **act data-driven**, aim to **identify business opportunities** and **optimize processes and services**.

In order to achieve our mission, we ensure **measurability** of required data-points and leverage **modern technology** and analytical methods, while maintaining high **data quality and security**.

Also the vision is defined based on input from the stakeholders and aligned with the corporate strategy to support S-GE's overall vision:

To be the driving force behind **data-driven innovation**, unlocking **new opportunities** and enhancing **customer experience** through the power of insights that drive the Swiss economy.

We create a culture of **data-driven decision-making**, where everyone is capable of using data to unlock **new value** and foster our **competitive advantage**.

### 2.4.2. Guiding Principles

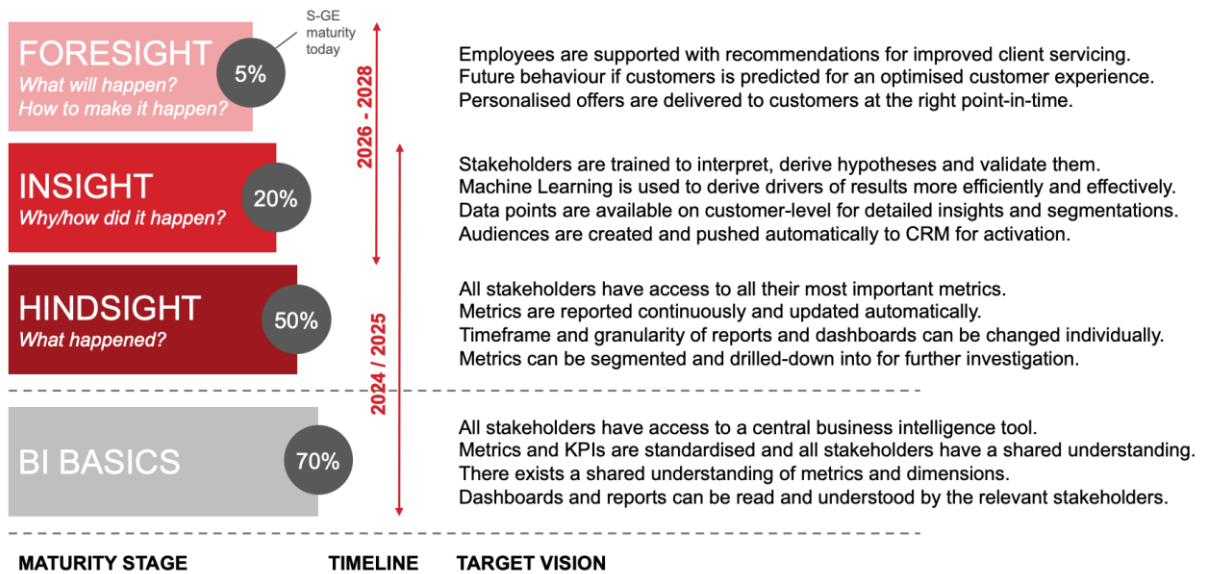
In order to support decision making and to ensure the vision and mission of the BI-product are achieved, we have defined guiding principles which are categorized in three buckets and split into four strategic themes each.

	 <b>Customer/Partner Value</b> <b>BUSINESS VALUE</b> <i>Does the feature / improvement benefit the customer?</i>	 <b>Data Excellence</b> <b>DATA</b> <i>Does the feature / improvement enhance S-GE's data capabilities?</i>	 <b>One Team</b> <b>ORGANISATION</b> <i>Does the feature / improvement facilitate collaboration or productivity?</i>	 <b>Tech Mastery</b> <b>TECH</b> <i>Does the feature / improvement considered best practice?</i>
Strategic Themes	Support data-driven decision-making (label: <b>decisions</b> )	Move to relational data model (label: <b>relationality</b> )	Serve as BI-Product with clear strategy (label: <b>BI product</b> )	Reduce architectural complexity (label: <b>simplicity</b> )
	Improve operational efficiency (label: <b>efficiency</b> )	Ensure high data quality (label: <b>data quality</b> )	Work integrated & aligned across teams (label: <b>team collaboration</b> )	Avoid lock-in effects (label: <b>flexibility</b> )
	Enhance customer experience (label: <b>CX</b> )	Ensure full measurability (label: <b>measurability</b> )	Work transparently and structured (label: <b>transparency</b> )	Use Tableau as central BI-tool (label: <b>tableau</b> )
	Identify new business opportunities (label: <b>opportunities</b> )	Ensure thorough documentation (label: <b>documentation</b> )	Clearly defined roles & responsibilities (label: <b>ownership</b> )	Be ready for a cloud migration (label: <b>cloud migration</b> )

### 2.4.3. From Hindsight to Insight & Foresight

S-GE has defined three data maturity stages and desires to excel in one stage after another during the next 3-5 years. While “BI Basics” and “Hindsight” use cases have already been worked on extensively over the last years, there is still ground to cover in the two coming years (see [Current Situation & Aspired Vision](#) for details).

From 2025 onwards, S-GE expects to focus more and more on driving value through “Insights” and “Foresight” use cases and initiatives in order to create added value to the organization and customer experience.



## 2.5. CURRENT SITUATION & ASPIRED VISION

As part of the BI strategy process in Q1 2023, interviews were conducted with stakeholders from all divisions as well as the external partners. The insights were consolidated in the following overview, split into the four categories: Technology, Data, Organization, and Use Cases.

**Legend:** Aspired vision is ● ...fulfilled, ● ...mostly fulfilled, ● ...somewhat fulfilled, ● ...not fulfilled

## 2.6. TECHNOLOGY

Technological capabilities represent the key components to enable data-driven organizations in the first place.

External Partner				
Section	Eval*	Situation	Complication	Aspired Vision
<b>Architecture &amp; Infrastructure</b>	<span style="color: yellow;">●</span>	<ul style="list-style-type: none"> <li>•Infrastructure overall stable.</li> <li>•Infrastructure has grown over more than a decade in multiple iterations.</li> <li>•Infrastructure driven by a bootstrapped strategy (e.g. open source tools) and pragmatic workarounds.</li> <li>•Contrary to remaining organization, BI is primarily on-premise and not in cloud.</li> </ul>	<ul style="list-style-type: none"> <li>•Bootstrapping and pragmatic workarounds may cause increased long-term costs.</li> <li>•Operating two different RDBMS for staging and live add unnecessary complexity</li> </ul>	<ul style="list-style-type: none"> <li>•There exists max. one type of RDBMS in the architecture across environments.</li> <li>•Possible future cloud-migration is kept in mind when changing or extending architecture.</li> </ul>
<b>Data Integration &amp; Modelling</b>	<span style="color: orange;">●</span>	<ul style="list-style-type: none"> <li>•ELT-process is overall stable but has grown complex. Process is monitored automatically on daily basis.</li> <li>•CRM data is fully historised, creating an advantage over in-tool reports in D365.</li> <li>•Data model (according to external partner) overall quite lean.</li> </ul>	<ul style="list-style-type: none"> <li>•High data engineering efforts for maintenance due to high number of sources.</li> <li>•Multiple data marts available to report on same numbers, creating unnecessary complexity to data model, deviation in metrics and duplicated work.</li> <li>•Missing relational data model for faster and simpler (ad-hoc) report creation.</li> </ul>	<ul style="list-style-type: none"> <li>•Incremental loads are used where possible, for maximum reduction of data load and increase in performance of the entire ELT-process.</li> <li>•Data data model is lean and without redundancies. Core tables are used, relationships are defined or, at best, a clear star-schema is leveraged.</li> <li>•ELT-process is resilient and does not break when changes are done on the source.</li> </ul>
<b>Tools</b>	<span style="color: yellow;">●</span>	<ul style="list-style-type: none"> <li>•Tableau is set to be the central tool for reporting.</li> <li>•HR is an exception, reporting directly with PowerBI using the API-connector to Dynamics365</li> </ul>	<ul style="list-style-type: none"> <li>•LookerStudio, PowerBI and Excel often used as a quick workaround tool when Tableau skills n/a.</li> </ul>	<ul style="list-style-type: none"> <li>•Tableau has access to all data sources, stored in the central BI database, for data analyses without LookerStudio or Excel.</li> <li>•All reports are created in Tableau (except HR-reports in PowerBI)</li> </ul>
<b>Transformation &amp; Scheduling</b>	<span style="color: orange;">●</span>	<ul style="list-style-type: none"> <li>•Transformation is mostly done with Windows Task Scheduler.</li> <li>•Full ELT-process currently runs around 9 hours every night.</li> <li>•Currently no git repository used for versioning and easier collaboration on code.</li> </ul>	<ul style="list-style-type: none"> <li>•Currently no or no innovative instance for code orchestration, scheduling and versioning.</li> <li>•Current setup makes it hard to roll-back in case of problems or faulty developments.</li> </ul>	<ul style="list-style-type: none"> <li>•Have a modern and central tool in place that orchestrates all data transformation and schedules all jobs.</li> <li>•Have a git repository in place for convenient collaboration and versioning of the entire code.</li> </ul>

## 2.7. DATA

Data is the fuel for a future BI-setup. Its quality, availability and application are critical to business success.

Data				
Section	Eval*	Situation	Complication	Aspired Vision
<b>Data Quality</b>	●	<ul style="list-style-type: none"> <li>•All required data sources are connected and available on most granular level.</li> <li>•Data quality is not top of mind in the organization and hence not monitored continuously</li> <li>•Duration since data is available is high.</li> </ul>	<ul style="list-style-type: none"> <li>•Certain CRM entities partly not tracking relevant meta-information.</li> <li>•Google Analytics 4 data currently stored in partner's BigQuery instance (update: since 26.01.23 now stored in S-GE instance).</li> </ul>	<ul style="list-style-type: none"> <li>•Missing data is available in Tableau and all required meta-data is available in CRM.</li> <li>•Data quality is measured for all data sources ongoingly with regards to Accuracy, Completeness, Consistency, Timeliness, Validity and Relevance.</li> </ul>
<b>Data Security &amp; Privacy</b>	●	<ul style="list-style-type: none"> <li>•Topic addressed in Data Governance Concept which is currently worked on but still very complex.</li> <li>•New data privacy regulations coming up in 2023 for CH, adding importance.</li> </ul>	<ul style="list-style-type: none"> <li>•Access management to data only on data-mart-level, giving too many employees access to personal identifiable information (PII).</li> <li>•Current data governance concept too complex to operate.</li> </ul>	<ul style="list-style-type: none"> <li>•Access to data marts is managed actively and, where necessary, limited by columns and row.</li> <li>•BI-setup is compliant with upcoming data privacy regulations in CH.</li> </ul>
<b>KPIs &amp; Metrics</b>	●	<ul style="list-style-type: none"> <li>•KPIs are clearly defined on company-level but not always defined per division.</li> <li>•Same for targets values.</li> </ul>	<ul style="list-style-type: none"> <li>•Missing central standardization (documentation &amp; understanding) of KPIs and metrics per and across divisions.</li> <li>•Missing target values per KPI for improved reporting and decision-making.</li> </ul>	<ul style="list-style-type: none"> <li>•All KPIs and metrics are defined in one central place, harmonized across divisions and aligned with corporate strategy.</li> <li>•KPIs have defined target values that help to interpret the performance of single divisions and activities.</li> </ul>
<b>Documentation</b>	●	<ul style="list-style-type: none"> <li>•Certain documentation has been updated as part of the strategy-/RfP-process.</li> <li>•In-code documentation exists mostly.</li> </ul>	<ul style="list-style-type: none"> <li>•Only little documentation exists on entire BI-setup (architecture, data integration, data model...).</li> <li>•Missing central tool, place and process for technical documentation.</li> </ul>	<ul style="list-style-type: none"> <li>•Technical documentation is part of every development.</li> <li>•There is central place, tool and process for documentation which is constantly held up to date.</li> </ul>

## 2.8. ORGANIZATION

The organization is the key to success, as is a tool that must be used correctly and continuously by the people.

Organization				
Section	Eval*	Situation	Complication	Aspired Vision
<b>Vision, Mission &amp; Strategy</b>	● *	<ul style="list-style-type: none"> <li>•Data essential part of overall corporate strategy.</li> <li>•Vision and mission were set to be defined during this strategy.</li> </ul>	<ul style="list-style-type: none"> <li>•Multiple approaches on defining data strategy in past 2 years but no final result.</li> <li>•Vision and mission so far not tied to corporate strategy and aligned within D+T.</li> </ul>	<ul style="list-style-type: none"> <li>•Have a clearly defined vision and mission statement in place that guides the future of data within S-GE.</li> <li>•Have clearly defined guiding principles that help setting priorities and roadmaps on an ongoing basis.</li> <li>•Holding periodic ideation sessions to review degree of strategy execution, brainstorm new use cases and update roadmap.</li> </ul>
<b>Internal Team Setup</b>	● *	<ul style="list-style-type: none"> <li>•Ownership of data architecture has been spread across partners and internal.</li> <li>•Urgency and momentum for positive change and need for central data ownership is high.</li> <li>•Power users in EP and IP very valuable to enable departments to use data.</li> <li>•Already two FTEs in company committed only to data and insights.</li> </ul>	<ul style="list-style-type: none"> <li>•Data and budget ownership not clearly defined as it has been spread across organization until now.</li> <li>•Unclear/undefined roles, ownership and responsibilities so far.</li> <li>•Insufficient Tableau skills among power users (e.g. for finance reporting).</li> <li>•Internal data skills across divisions and BI-resources very limited.</li> </ul>	<ul style="list-style-type: none"> <li>•Shift towards a BI-product, with central budget and ownership for data and agency communications.</li> <li>•Identify and define relevant roles and responsibilities within the BI-team, group them to profiles and define future team setup, aligned with other value streams.</li> </ul>
<b>External Partner</b>	●	<ul style="list-style-type: none"> <li>•Somnitec responsible for providing infrastructure across organization.</li> <li>•Current ext partner responsible for operating BI-infrastructure and ELT-process. Able to provide all necessary resources and data skills but leads to high external costs and dependency.</li> </ul>	<ul style="list-style-type: none"> <li>•Budget fluctuations due to upcoming tender causes difficulty in planning and roadmapping</li> <li>•High dependency on external service provider generates high annual costs.</li> </ul>	<ul style="list-style-type: none"> <li>•There exists an excellent working mode with external partner, incl. collaboration on technical topics and efficient in sprint planning/prioritization.</li> <li>•Ownership for data infrastructure lies with internal BI-team. Ext. partner is responsible for strategic advisory, maintenance and further development.</li> <li>•Ext. partner is integral part of the BI-team, proactively collaborates on the execution of the strategy and roadmap definition.</li> </ul>
<b>Processes</b>	● **	<ul style="list-style-type: none"> <li>•Light processes exist for weekly meetings w/ partner and other value streams.</li> <li>•Sprints are started on a monthly basis.</li> <li>•Multiple entries exist for new reporting requests.</li> <li>•Extended internal BI-team works strongly integrated with external partner.</li> </ul>	<ul style="list-style-type: none"> <li>•Insufficient communication on source system changes (esp. CRM) and implications on data across divisions.</li> <li>•No clear request process exists, causing inefficiencies in backlog prioritization.</li> <li>•No shared processes across value streams for collaboration.</li> <li>•Working mode between current external partner and internal BI-team leaves room for improvement</li> </ul>	<ul style="list-style-type: none"> <li>•Have a clearly defined request/demand process in place, incl. request submission, definition, dispatchment and prioritization, aligned across all D+T value streams.</li> <li>•Have a shared working mode across D+T value streams in place, incl. meeting structure, sprint cycle and backlog prioritization.</li> </ul>

\*has now been defined as part of this strategy/project in last 3 months

\*\*have now been improved and aligned within D+T as part of this strategy/project in last 3 months

## 2.9. USE CASES

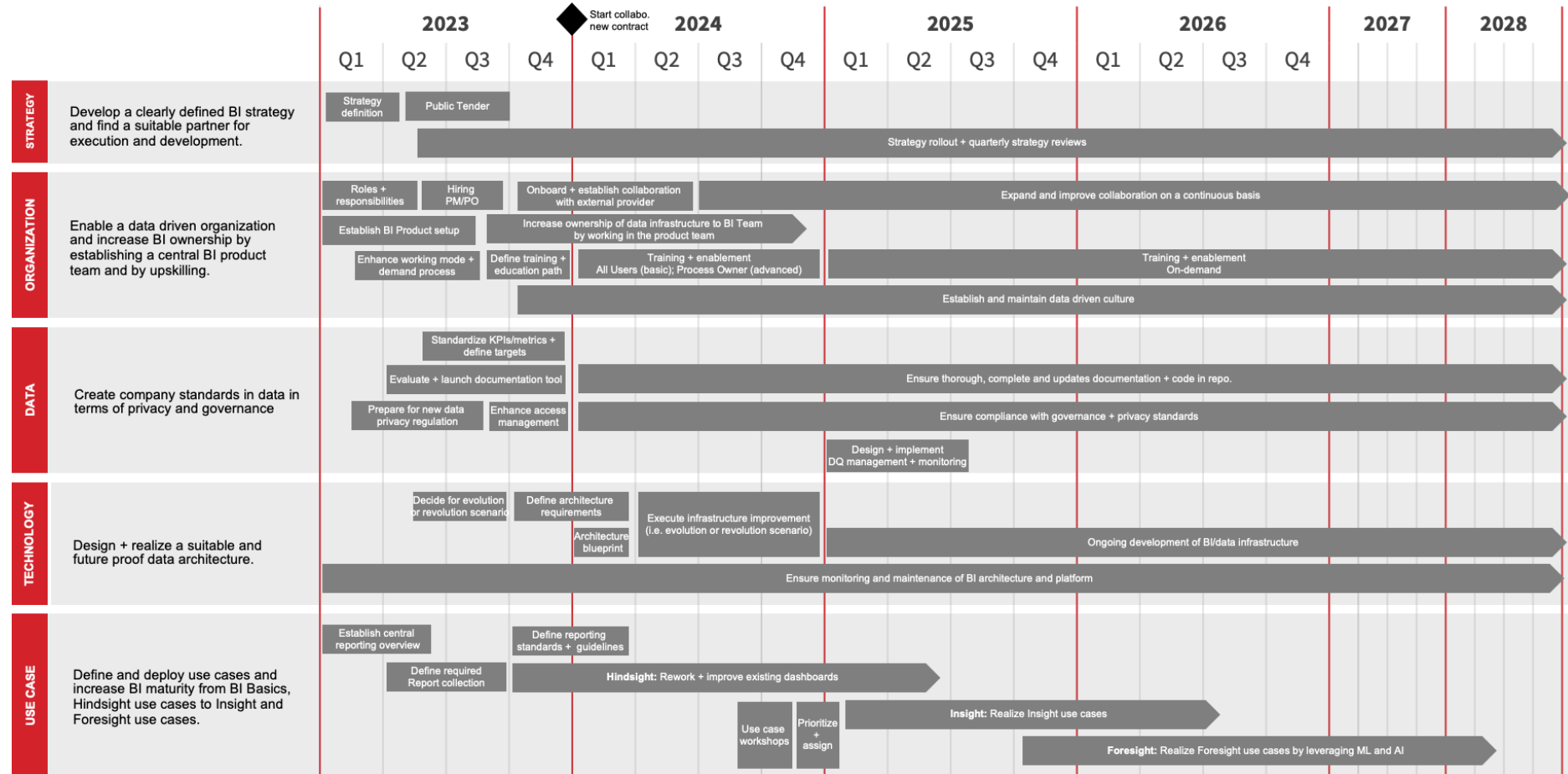
Use cases define the specific application of data and therefore represent the "why" in all efforts behind Analytics/BI.

Use Cases				
Section	Eval*	Situation	Complication	Aspired Vision
Hindsight	●	<ul style="list-style-type: none"> <li>•All departments are serviced with reports about past performance today already</li> <li>•There is a vast amount of those retrospective reports available in the organization already.</li> <li>•Users often hindered from using reports due to reports being not user-friendly or over-stuffed.</li> </ul>	<ul style="list-style-type: none"> <li>•Some reports are hard to consume due to vast amount, overwhelming amount of sheets and little standardization within and across divisions (i.e. formatting, naming conventions/definitions of metrics etc.).</li> <li>•Employees have hard time knowing and understanding where to find, where to look and how to use the dashboards, causing a dashboard fatigue.</li> <li>•Missing know-how in creation of operations reports (esp. financial controlling).</li> </ul>	<ul style="list-style-type: none"> <li>•All stakeholders have access to all their most important metrics which are reported continuously and updated automatically.</li> <li>•Timeframe and granularity of reports and dashboards can be changed individually, metrics can be segmented.</li> <li>•The BI-team is capable of consulting in the creation of several different reports as e.g. business, marketing, operations reports.</li> </ul>
Insight	●	<ul style="list-style-type: none"> <li>•Current reports do not support easy interpretation of the data.</li> <li>•Power Users in divisions help to get more but not yet all out of existing reports and dashboards.</li> </ul>	<ul style="list-style-type: none"> <li>•Current reporting setup does not support business to maximize insights.</li> <li>•Skills are missing in the wider organization to derive more insights from existing reports.</li> </ul>	<ul style="list-style-type: none"> <li>•Stakeholders are enabled to interpret data, derive hypotheses and validate those. Machine learnings helps in addition to derive drivers of results faster.</li> <li>•Data points are available on customer-level for detailed insights and segmentations. Segments can be derived for activation in CRM and Sales.</li> </ul>
Foresight	●	<ul style="list-style-type: none"> <li>•First advanced analytics use cases have been piloted but not made productive.</li> <li>•Data is currently not yet fed back into source system for activation (esp. CRM)</li> </ul>	<ul style="list-style-type: none"> <li>•Organization missing capabilities and ownership to operate advance analytics use cases.</li> </ul>	<ul style="list-style-type: none"> <li>•Employees are supported with recommendations for improved client servicing.</li> <li>•Future behavior of customers is predicted for an optimized customer experience and personalised offers.</li> </ul>
Knowledge Sharing	●	<ul style="list-style-type: none"> <li>•Knowledge sharing exists to a certain degree within BI team, incl. power users.</li> <li>•No central place and process to document insights, hypotheses and results.</li> </ul>	<ul style="list-style-type: none"> <li>•Insights generated are not documented and shared in organization sufficiently.</li> </ul>	<ul style="list-style-type: none"> <li>•Reports, dashboards, metrics, dimensions are documented centrally</li> <li>•Insights are shared with relevant people in the organization.</li> </ul>



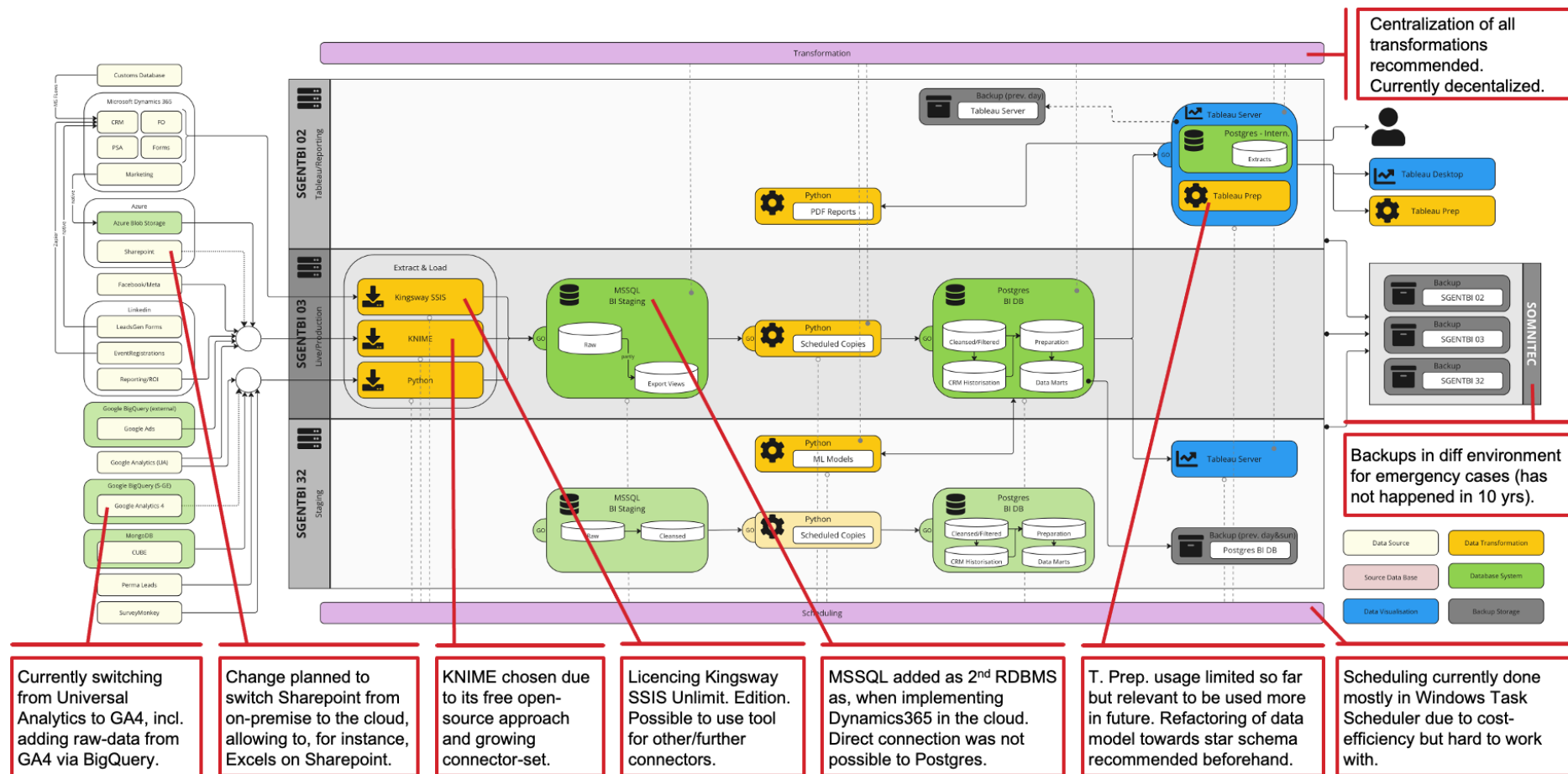
## 2.10. HIGH-LEVEL STRATEGY-ROADMAP

Based on the aspired vision for the BI-Product, S-GE has defined a high level roadmap for the current and the next five years. The roadmap excludes currently unforeseen changes for the future which will be subject to additional scope and budget.



### 3. Technical Solution Overview

The current BI-infrastructure has grown historically over a course of >10 years and has been guided by principles like pragmatism, cost-efficiency and completeness, in terms of connected data sources and granularity. Pragmatism and cost-efficiency have partly led to workarounds, like running two different RDBMS and cost-efficiency has hindered bigger changes in the recent years. Please refer to [“Technology”](#) for more context on the solution and to [“Roadmap”](#) for more details on the plan to improve the setup



There are three data integration services used in the current BI-infrastructure: Kingsway SSIS, KNIME and Python. Which service is being used, is usually decided based on the most pragmatic solution or a quick comparison. The infrastructure is hosted on three different Windows servers which are provided by Somnitec. Somnitec is S-GE's partner for the technical infrastructure corporate-wide. Their scope (provisioning of the infrastructure, incl. server and RDBMS, but excl. maintenance) **is not** subject to this tender. The three servers have the following purpose(s):

- SAGENTBI 02: Used primarily to host the Tableau server.
- SAGENTBI 03: Production database on which the entire ELT-process and both RDBMS are hosted.
- SAGENTBI 32: Test/Development Environment: Replication of the production databases and Tableau server for testing purposes (incl. ML models). Data updated only on demand.

Somnitec performs daily backups of all three environments. Tableau server itself is backed up in its own environment ('02). The Postgres "BI DB" in the production environment is additionally backed up onto the testing environment ('32).

Data is then ingested into a MSSQL database named "BI Staging" which can be described as a landing zone for the raw data. Here non-required tables or columns may be dropped before Python scripts copy the data to the Postgres database "BI DB". In this database, CRM data is being historised and data marts (i.e. reporting tables) are modeled in multiple steps using SQL.

Data transformation is primarily scheduled within Windows Task Scheduler but also in the data integration tools and partly within Tableau.

Below you find a list of additional dimensions and values for context on the volume of data within the BI platform.

Dimension	Category	Value	Source
Employees in CH	Company	117	Annual Report
Employees abroad	Company	100	Annual Report
Swiss Business Hubs / Trade Points Locations Worldwide	Company	26	Annual Report
Active contacts in CRM	CRM/Projects	242'000	MS Dynamics365
Active companies in CRM	CRM/Projects	136'000	MS Dynamics365
Leads in CRM in 2022	CRM/Projects	56'000	MS Dynamics365
Customers (A-C category)	CRM/Projects	18'400	MS Dynamics365
Supported SMEs 2022	CRM/Projects	5'547	MS Dynamics365
Members (companies)	CRM/Projects	2'035	MS Dynamics365
Started projects/opportunities in 2022	CRM/Projects	1'260	MS Dynamics365
Establishment projects (IP)	CRM/Projects	129	MS Dynamics365
Postgres DWH "BI DB"	BI	500 GB	BI Platform
Staging tables from CRM	BI	100	BI Platform
Reports (folders)	BI	60	Tableau
Active Data Marts	BI	33	Tableau

## 4. Scope of tender

### 4.1. DESCRIPTION OF SERVICES REQUESTED

To continuously provide timely and accurate insights as well as actionable recommendations to all divisions in the organisation, we are looking for a business intelligence and analytics partner who supports the BI product team in:

- Ongoing strategic advisory (high-level) and operative sparring (use-case-focused)
- Sparring in general sprint management and coordination
- Maintenance of existing BI infrastructure and platform
- Monitoring of entire ELT-process (for max. up-time) and data quality
- Connection of new data sources (where need be)
- Improvement of existing infrastructure, regarding performance, resilience and security
- Further development of and responsibility for the data model
- Support in data visualization (reporting/dashboarding) and analyses
- Development of advanced analytics use cases (e.g. machine learning)

We wish for a partner who feels comfortable in the described situation and working environment, brings the skills required to support and to complement us as a key player in the established agile team with already given processes and technical platforms, and thus fits into the team and our digital product work.

Our goal is to establish a long-term partnership with a motivated partner and its team of specialists to help our BI product team in the journey bringing S-GE's BI products to the next level – by adding measurable value for the business and our customers.

We are not looking for a one-time project partner and envision an ongoing regular and long lasting partnership.

### 4.2. TYPE OF COLLABORATION/WORK

The partner and its team members adapt to work with and use the cloud-based collaboration tools and platforms provided by S-GE.

The partner will be represented with a central point of contact as an integrated member of the S-GE's BI product team. The partner will take part in planning and topic specific deep-dive meetings (e.g. sprint planning, sprint weekly, sprint retro, deep-dive, workshop, etc.). Upon the decision of S-GE, the meeting might be fully on-site at S-GE's premises in Zurich where it profits the quality of the outcomes. The partner ensures the presence of the required people.

The partner is expected to manage proactively assigned tasks, to-dos, and relevant status updates. Controlling and reporting with the required transparency and truthfulness are considered part of the job.

The partner shares the philosophy of working as “one team” in a respectful, hands-on environment focusing on delivering quality.

The partner and its team members have a solution-oriented attitude, a maker-mentality and live being forward-thinkers.

### 4.3. OUT-OF-SCOPE AND DELIMITATIONS

We want to highlight that we are not requesting the realization of one particular project but to find a partner that delivers the defined services in close collaboration with our in-house team.

We expect from the partner to be able to understand and onboard to this situation. We expect the partner to NOT blindly recommend an entirely new setup that suits their respective expertise and partnership with certain technology providers.

Provision and hosting of the technical infrastructure (excl. maintenance) is covered by Somnitec and thus not subject to this tender. Somnitec acts as a company-wide technology partner but is not involved in operating or using the platform.

Ownership of web tracking for Google Analytics 4, using Google Tag Manager, is internally owned by a different value stream and hence not subject to this tender. BI, however, works with the GA4 raw data via the BigQuery data stream.

#### 4.4. REQUIRED ROLES AND EXPERIENCE

As described in the sections [“Roles & responsibilities BI product team”](#) and [“Current and target team setup”](#) we are looking for specific roles and a fixed team setup. As we prefer a lean and efficient product team setup, we expect the service provider to identify persons who can take on several of the described roles. Moreover, we are sure that a simple price structure or a flat rate across specific roles can reduce the administrative burden and streamline the controlling process, allowing for a more efficient and cost-effective operation. Please keep this in mind when filling in the RFP\_BI\_Annex-09 (rates by role).

In addition to these roles, we expect the external partner to be experienced in:

- building and maintaining on-premise BI-infrastructures
- building and maintaining cloud BI-infrastructures with Microsoft Azure
- Python
- SQL data modeling for CRM, marketing and analytics data
- communicating and collaborating in English

We highly welcome experience in:

- building and maintaining excellent Tableau reports and dashboards
- SQL data modeling and data visualisation for finance, operations and HR data
- using KNIME and/or SSIS for data integration
- working with Microsoft Dynamics data
- communicating and collaboration in German

#### 4.5. COLLABORATION MODEL

The following list comprises meetings that we have identified as beneficial for our collaborative efforts. Fixed meetings follow a standardized way-of-working across all value streams within D+T.

Fixed meetings (standardized across value streams)

- Quarterly strategic review and outlook meeting (2-3 hours per quarter)
- Participation in bi-weekly sprint review and planning meeting (1 hour/2 weeks)
- Participation in bi-weekly mid-sprint review, refinement and alignment meeting (45min/2 weeks)

On demand meetings:

- Ad-hoc refinement/requirement meetings with product team and other S-GE employees regarding task related questions/topics (on average around 1-2 hours/week in total)

Optional meetings:

- Sprint retrospective meetings once a months (1 hour/month)
- Participation in daily stand-up meetings (2 times/week, 15 min each)

Ensuring suitable substitutes and planning of successors for any unavailability of key team members (sickness, vacations, sabbaticals, leaving the company). As we value your input and unique perspective, we kindly request that you share with us your preferred meeting routines and ways of working to ensure a productive and seamless collaboration (e.g. buddy-system in case of absence/leave/departure of a team member).

#### 4.6. EXPECTATIONS OF RESPONSIBILITIES

In order to fulfill our BI strategy and achieve the desired target vision, we expect our partner to take on the following responsibilities and range of services:

##### 4.6.1. Strategic Advisory & Forward Thinking

###### Strategic consulting and ongoing sparring

- Account management and client relationship building.
- Strategic sparring for internal product manager to further develop and execute S-GEs BI-strategy, shape roadmap and priorities.
- Prepare and participate in quarterly strategic review and outlook meetings and work with cross-divisional projects-teams.

###### Forward thinking

- Proactive identification, evaluation, and proposal of suitable solutions to add value to the product, the technology, and the services offering for S-GE or its customers.

#### 4.6.2. Sprint Planning & Coordination

##### Sprint Planning

- Qualification of requests into clearly defined tickets.
- Agile sprint planning including definitions and logging of epics, user stories and tasks with their artifacts.
- Participation and support internal PO in various sprint and on-site meetings or presentations.

##### Coordination

- General coordination and project management tasks.
- Ensure controlling and transparency regarding efforts and costs on task-level.
- Align between business stakeholder and tech team.

#### 4.6.3. Maintenance & Monitoring

##### Infrastructure

- Ongoing optimization, maintenance of infrastructure to ensure maximum up-time, performance, and security.
- Updates for infrastructure components (i.e. Tableau updates → 2x/year).

##### Data Integration & Model

- Automated monitoring, fixes and minor adjustments to data integration.
- Automated monitoring, fixes and minor adjustments to data model.
- Design and execute tests to ensure accuracy and reliability of modeled data .
- Ensure data quality and integrity through active data quality management.

##### Reports

- Maintain reports (incl. minor adaptations < 1h).

##### Support

- Support in terms of questions regarding dashboards/reports.
- Root cause investigations, identification of bugs and their fixing, so as solution change requests through technical adjustments.

##### Documentation

- Ensure thorough, complete, and updated documentation.

#### 4.6.4. Infrastructure Improvements

##### Development of Infrastructure, Data Integration & Model

- Design data infrastructure based on architecture and business needs.
- Implement changes to existing infrastructure and ensure the solution is scalable, secure, and maintainable.
- Refactoring of existing data integration and model for simplification and performance optimisation.
- Execute tests to ensure accuracy and reliability of modeled data.
- Ongoing adaptation of the infrastructure and data model in form of change requests (approx. 0.75-1 day per week, excluding separate projects, specific use cases).

##### Documentation

- Ensure thorough, complete, and updated documentation.

For further info see [Case 2: Infrastructure Improvement](#)

#### 4.6.5. BI Basics & Hindsight Use Cases

##### Reporting/Dashboard Basics - Standards + Guidelines

- Create standards and guidelines for reportings and dashboards.

##### Report/Dashboard Creation - Change

- Evaluate reporting requests and business requirements.
- Visualize data in clear and effective ways (i.e. dashboards & reports).
- Further develop reporting systems (i.e. Tableau).

##### Documentation

- Ensure thorough, complete, and updated documentation.

For further info see [Case 1: Dashboard & Reporting Landscape](#).

#### 4.6.6. Insight & Foresight Use Cases

##### Insights Generation

- Detailed data analysis, incl. deriving actionable recommendations on demand.
- Support stakeholders across the organisation on insights inquiries.

##### Advanced Analytics

- Build, test and optimize advanced analytics and activation use cases (will happen 2025+).

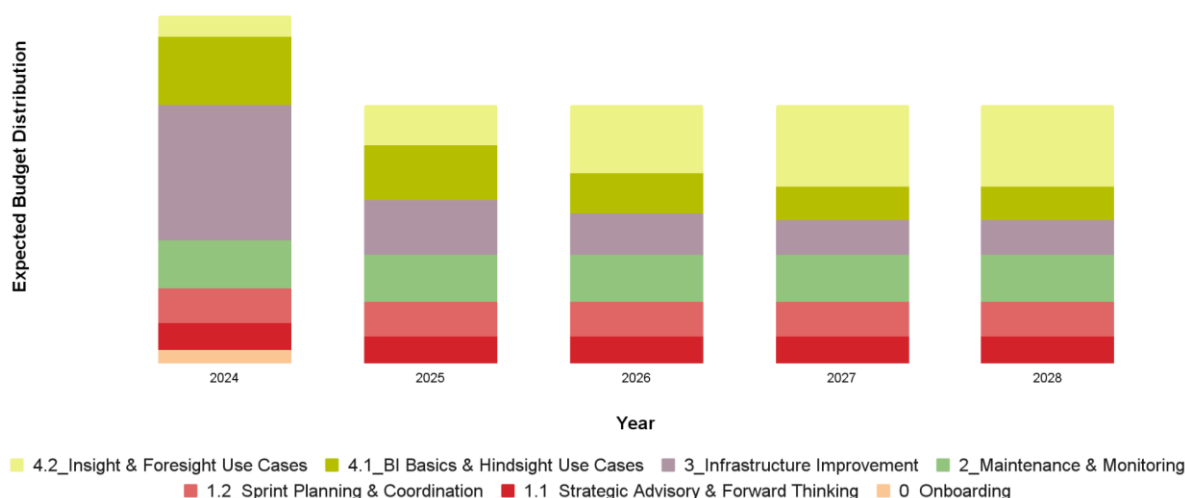
##### Documentation

- Ensure thorough, complete, and updated documentation.

#### 4.7. INPUTS REGARDING SCOPE OF THE DESCRIBED SERVICES AND BUDGET DEVELOPMENT

We anticipate that you will play a pivotal role in estimating the necessary scope of services required to fully support our BI strategy and roadmap. In light of this, we expect a surge in demand for resources during the initial year of our partnership to kick-start the realization of our defined target vision. Following this period, we anticipate a slight decline in resource allocation, albeit still at a high level. As our partnership matures, we expect a shift in resource allocation from BI infrastructure and reporting services towards more advanced analytics use cases.

To aid in your estimation of the required scope of services, we have provided you with some preliminary estimates, depicted in the following graph. However, please keep in mind that this graph is not based on scientific calculations and should only serve as a rough guideline. We trust that, with your expertise, you will review our BI strategy and the service components required and make your own informed assumptions. It is your prerogative to map the requisite roles to the scope of services as you see fit.



Elaboration of the scope of the BI service components, mentioned above:

- **Onboarding** (in case of provider change): We anticipate that onboarding will require minimal effort. While we are committed to fulfilling our responsibilities in this regard, we also value establishing a long-lasting partnership and appreciate any investment made by our partners towards achieving this goal. Please share your effort estimates in RFP\_BI\_Annex-09.
- **Strategic Advisory & Forward Thinking** (incl. sparring) will remain constant and formats are defined (e.g. quarterly strategic meetings). There might be possible changes depending on temporary topics or advanced use cases. Please share your effort estimates in RFP\_BI\_Annex-09.
- **Sprint Planning & Coordination**: Ongoing activities are unlikely to vary significantly assuming a consistent working relationship and no major changes in the project scope. Please share your effort estimates in RFP\_BI\_Annex-09.



- **Maintenance & Monitoring:** Costs are expected to decrease or remain steady over the next 3-5 years as the BI infrastructure becomes more established and automated. Please share your effort estimates in RFP\_BI\_Annex-09.
- **Infrastructure Improvement (Case 2):** The (r)evolution of the infrastructure will require a higher initial investment which may plateau or decrease in subsequent years as the infrastructure becomes more established. Our experience has shown that continuous adaptation based on business change requests currently takes up approximately 0.75-1 day per week (excluding separate projects and specific use cases). We require a budget scenario for both revolutionary and evolutionary changes. Detailed effort estimates in the pricing sheet RFP\_BI\_Annex-09 are only necessary for the evolution scenario, which shall include a baseline for continuous adaptations (change requests) after the implementation.
- **BI Basics & Hindsight Use Cases (Case 1):** These use cases (as outlined under [Use Cases](#)) and hence the standardization and creation of reports will be a strong focus on the first 1-2 years of the collaboration. These services may plateau or decrease in subsequent years as the reports become more established and less complex. Please share your effort estimates in RFP\_BI\_Annex-09 according to [Case 1](#) for the first year. The scope of ongoing years will be defined throughout the partnership.
- **Insight & Foresight Use Cases:** A shift towards more insights creation and advanced use cases will occur in years 2-3, which could require additional investment in areas such as data science and machine learning. Please provide your thoughts on how you typically approach those use cases. It's not necessary to provide an estimation of the efforts in RFP\_BI\_Annex-09 since these use cases will be handled as individual projects or on demand requests.

In summary, maintenance, coordination, and strategic advisory services will remain stable while optimization and reporting services may require more investment initially and then plateau or decrease. A strong BI basis and standardized reports will be prioritized in the first 1-2 years, with resources going towards advanced use cases from year 3 onwards.

We expect the service provider to consistently provide **Strategic Advisory & Forward Thinking, Sprint Planning & Coordination**, and **Maintenance & Monitoring** as part of their basic and constant scope of work. These critical activities are essential to ensure a smooth operation and success of the execution of our BI Strategy. Additionally, we understand that certain areas may require more in-depth work and a definition of the scope, such as for **Infrastructure Improvement, BI Basics & Hindsight Use Cases**, and **Insights & Foresight Uses Cases**.

Based on your experience, please provide binding resources and effort estimates that will ensure successful implementation of both cases. For the Insight and Foresight use cases, we do not expect any effort estimates for now, as these will be identified, prioritized, and planned during the course of the collaboration.

To minimize variance, we propose a forward-looking, rolling planning approach with our partner to estimate demand early on and adapt to needs.

## 5. Administrative

### 5.1. CLIENT / CONTACT

#### Switzerland Global Enterprise

Project: Selection of a Partner for Business Intelligence and Data Analytics

Stampfenbachstrasse 85  
P.O. Box  
CH-8006 Zurich

The contact person on the part of S-GE is responsible for the entire tender process

Name: Sarah Messmer  
Function: Digital Transformation Director  
Email: bi-tender@s-ge.com

Please assign a contact person for the entire process and communicate the details to the S-GE contact with receipt of this RFP.

The completed tender documents have to be sent in at the above e-mail address. The above e-mail box is only looked at on the tender opening day and has been created solely for the purpose of handling this tender. The box is not monitored until opening day and might be closed after reception of tenders.

### 5.2. TENDER SCHEDULE AND BINDING DEADLINES

Following the completion of the selection process, the applicant companies will be informed in writing (e-mail) of the results of the selection. The following dates are scheduled for the entire procedure (subject to change):

ID	Assignment	Deadline	Responsible
1	Simap publication	21.04.2023	S-GE
2	Supplier questions	08.05.2023	Supplier
3	Responses to supplier questions	15.05.2023	S-GE
4	Submission of tender	05.06.2023	Supplier
5	Opening of tender	07.06.2023	S-GE
6	Invitations to presentations	20.06.2023	S-GE
7	Presentations	10.07.2023 - 21.07.2023	Supplier
8	Selection decision / award	21.08.2023	S-GE
9	Contract conclusion	31.10.2023	S-GE
10	Handover phase (if needed)	01.11.2023 - 31.12.2023	S-GE / Supplier
11	Start collaboration	01.01.2024	S-GE / Supplier
12	Debriefing of not considered suppliers	21.08.2023 - 08.09.2023	S-GE / Supplier

S-GE reserves the right to adjust the procedure and/or timetable at any time.

### 5.2.1. Formal Requirement of Submission of Requests to Participate

The complete tender must be sent in by **e-mail** to the address listed under point 4.1 Client / Contact person S-GE.

The text of the electronically filed offer must be searchable using a search function. All documents have to be sent in without any password protection etc.

The offer must be submitted to the contact person of S-GE in full and with a legally valid signature and in the required form.

The application must be named and submitted with the note "Submission of S-GE BI-Tender".

Please be aware that failure to comply with the formal requirements will result in disqualification:

- not submitted in due time
- requested documents not complete
- not legally signed
- documents submitted changed
- unusually low bid can lead to exclusion
- proof of compliance with the conditions of participation not fulfilled

### 5.2.2. Questions on the Tender Document

Direct contacts between the applicant companies and the responsible persons at the awarding authority are not envisaged. Questions in connection with the RFP are to be submitted via the simap platform forum only in English language and will be answered on the simap platform, visible for all applying companies.

**Deadline for submission of questions: 08.05.2023**

### 5.2.3. Presentation

All contractors that have submitted an offer will be informed whether they will be invited for the presentations.

The presentation will last a maximum of 90 minutes, with an additional 30 minutes for questions and answers (120 minutes total).

The best ranked suppliers, that still have the possibility to win the tender, but in maximum three, will be invited to the presentation. The weighting of the selection criteria (SC1-SC4) is used to determine the suitable companies.

We expect the providers to present the use cases at the presentation day and to send their presentation documents to the S-GE contact person the day after the presentation.

We expect the key persons to be present to get a personal impression of the resources and the team.

### 5.2.4. Contract conclusion

After deciding on a provider, the contracts will be defined and concluded. This is based on the contract templates provided in the RFP process. S-GE reserves the right to cancel the process in the event of difficult contract conclusion or to continue with the second-placed provider.

## 5.3. DURATION OF THE CONTRACT

The contract duration is 3 years starting on January 1st, 2024, ending December 31st, 2026 with optional contract extensions of 1+1 years (max 5 years; until 31.12.2028).

Cancellation period is 6 months, always at the end of the month.

## 6. General Requirements

### 6.1. GENERAL REMARK

This RFP (with annexes), the explanations of S-GE in the forum of simap.ch as well as the questions and answers of tender-procedure serve as a basis for the offer.

### 6.2. STRUCTURE OF THE OFFER

In the interest of an evaluation that is as efficient and fair as possible, it is imperative that the applicant companies follow the below listed structure. Submitted proposals that are not structured as follows may be excluded from further proceedings.

**In addition to the below structure all annexes (RFP\_BI\_Annex-01...09) have to be completed and where requested legally signed.**

Chapter		Reference
<b>A</b>	<b>General Description of providers company expertise</b>  Please provide a brief overview of your company profile concerning <ul style="list-style-type: none"> <li>• skills and experience</li> <li>• organizational setup</li> <li>• working structure</li> <li>• size of knowledge groups</li> <li>• relevant BI knowledge</li> </ul>	Please use your own template.
<b>B</b>	<b>Deep Dive BI Experience</b>  Please provide a short summary of your understanding of the situation and vision of S-GE and where you see the challenges and chances for S-GE and how you would tackle it.  Explain your ability and your way of advising S-GE on mid- and long-term strategic BI topics (from BI basics and hindsight use cases to foresight use cases). Please highlight these competences with case studies / references which may be verified by S-GE.  Outline your capability to perform as sparring partner in operational tasks for data and analytics topics. Please highlight these competences with case studies / references which may be verified by S-GE.	Please use your own template.
<b>C</b>	<b>Case 1 and Case 2</b>  Please provide as detailed as possible a description and estimate for your concept/solution for the two cases. For more details on the cases, please refer to chapter <a href="#">6.3</a> .	Please use your own template.
<b>D</b>	<b>Team setup and way of working</b>  Please show in a short description the following points to give us a solid overview and understanding about the planned setup, team, people and the way of working collaboration: <ul style="list-style-type: none"> <li>• Experience and availability of proposed account lead for S-GE</li> <li>• Proposed team set-up, incl. size, roles and skills</li> <li>• Proposed working mode and ability to work strongly integrated with the S-GE team</li> </ul>	Please use your own template.

	<ul style="list-style-type: none"> <li>Ability to handle high and low demand periods</li> </ul> <p>Please refer to our skill-matrix in RFP_BI_Annex-09 (sheet Roles &amp; Mapping).</p> <p>Please show your transition roadmap and explain as detailed as possible how you plan to implement the BI strategy together with us.</p>	
<b>E</b>	<b>Price Sheet</b> Please fill in the attached Price Sheet. We have defined three seniority levels (Junior, Senior, and Manager), whereas the Manager is the most senior one You are not allowed to add other seniority levels. You must match your levels into these 3 levels. The combination of level and roles gives 18 possible project profiles. You must insert a price for each project profile because future tasks could make use of them. The daily rate includes all costs except VAT and expense allowance. The expense allowance has to be listed separately (flat rate per year) Additional cost types, not mentioned here, must be included in the daily rate.	RFP_BI_Annex_09
<b>F</b>	<b>Framework Agreement</b> The attached framework agreement forms the basis of our cooperation. Please review it and, if necessary, incorporate proposed changes and remarks (using the change mode of Microsoft Word), which are clearly understandable by S-GE.	RFP_BI_Annex_08 RFP_BI_Annex_07
<b>G</b>	<b>Presentation</b> Based on your offering and on the cases we expect the invited providers to hold a presentation to the representatives of S-GE.	Please use your own template.

### 6.3. CASES

As part of your submission, we request that you provide solutions for two specific cases. These cases will be used to evaluate your skills and approach. We intend to execute both cases with the start of the collaboration. Please elaborate your solution approach and the corresponding effort expectations.

#### 6.3.1. Case 1: Dashboard & Reporting Landscape (BI Basics + Hindsight)

**Situation & Complication:** As outlined in [Situation & Aspired Vision \(Use Cases\)](#) and [Expectations of Responsibilities](#), the current dashboard and reporting landscape has organically grown, resulting in various formats and designs across Tableau, LookerStudio, and PowerBI, making it difficult for employees to navigate. The current reports lack user-friendliness, readability, and individual adjustments of timeframe, segments, and granularity, further adding to the challenge of interpreting and utilizing the data.

**Task:** Please outline your approach in supporting us to achieve our described target vision in regards to hindsight use cases ([Use Cases](#)) which involves developing a unified reporting/dashboard platform that is consistent and user-friendly across the organization. Please elaborate your approach and methodology on the following points:

- Develop unified reporting/dashboard guidelines and standards for consistency and a shared understanding across the organization.
- Consolidate and improve existing reports to provide a well-documented self-service-platform for employees, with a consolidated view of all reports in one place.
- Share two sample reports from your portfolio as a reference:
  - KPI report: provides a high-level overview of key performance indicators to track performance against goals and identify areas for improvement (e.g. quarterly KPI reporting).
  - Operative report: provides a detailed summary of the operations and activities performed by a particular department (e.g. Finance, Marketing etc.).
- Provide a rough timeline outlining your approach for year 1.
- Provide a rough estimation of cost to realize your approach for year 1. The scope of ongoing years will be defined in the course of the partnership.
- For reference, we aim to standardize 6 primary dashboards in year 1, visualizing data from 3-4 data sources (e.g. CRM data, campaign data, web analytics data, etc.).

Please ensure that your concepts

- are in line with the defined vision, mission, and guiding principles (see [BI Strategy](#)).
- solve the challenges and help reach the target visions, defined under [Situation & Aspired Vision](#).
- For clarification, you may raise open questions during the bidding phase under "[Questions on the tender document](#)".

### 6.3.2. Case 2: Infrastructure Improvement

**Situation & Complication:** As outlined in [Situation & Aspired Vision](#) (esp. Technology and Data) and [Technical Solution Overview](#), the current setup has grown over a long period of time and shows certain challenges to reach the target vision. S-GE sees three different scenarios to change the infrastructure during 2024.

**Task:** Please provide a concept for both scenarios, "Evolution" and "Revolution". Concepts need to include at least

- a technical architecture, including argumentation for the selected infrastructure components (you may request a link to the current architecture drawing during the phase "[Questions on the Tender Document](#)").
- a rough timeline to realize the changes.
- a rough estimation of cost to realize the changes (**Remark: Detailed effort estimates in the pricing sheet RFP\_BI\_Annex-09 need to be done for evolution scenario only.**)
- an elaboration on how the scenarios will impact monitoring and maintenance costs.
- recommendation for one of the two scenarios.

SCENA- RIO	NONSOLUTION	EVOLUTION	REVOLUTION
<b>Outline</b>	In this scenario no changes are undertaken to the current setup. Everything is kept as regarding architecture, infrastructure components, data integration and data model.	In this scenario only incremental improvements and extensions are to be made to the BI-platform. This case includes: <ol style="list-style-type: none"> <li>1. replacing max. one RDBMS with the other</li> <li>2. switching Dynamics365 to incremental data loads to reduce ELT jobs</li> <li>3. migration of scheduling and transformations into central and state-of-the art tools</li> <li>4. adding a git repository for easier collaboration and code versioning</li> <li>5. refactoring of data model towards a relational model or star schema</li> <li>6. adding missing documentation and documenting changes/additions</li> <li>7. upskilling organization in Tableau</li> </ol>	In this scenario the BI-platform is to be fundamentally changed and migrated into the cloud. This case includes: <ol style="list-style-type: none"> <li>1. points 2-7 from evolution</li> <li>2. migrating data integrations into cloud and, if justified, use another service (e.g. Data Factory)</li> <li>3. replacing the MSSQL "Staging DB" with a data lake</li> <li>4. hosting existing DB on Azure or replacing it with Synapse Analytics or Snowflake on Azure.</li> </ol>
<b>Given Factors</b>	Everything remains as it is.	Tableau is the only BI-tool.	Tableau is the preferred BI-tool. If you prefer others please elaborate. Azure is the only cloud platform. Hosting of services on Azure possible.

Please ensure that your concepts

- are in-line with the "Outline" and "Given Factors" above.
- are in-line with the defined vision, mission and guiding principles (see [BI Strategy](#)).
- solve the challenges and help reach the target visions, defined under [Situation & Aspired Vision](#).

#### **6.4. APPLICABLE LEGISLATION**

This tender will be made by open procedure. Procurement is subject to GATT/WTO regulations. The legal remedies provided for in BöB and VöB are applicable.

#### **6.5. PRE-REFERRAL AND PREJUDICE**

Companies involved in the preparation of these specifications and the evaluation of the bids will be excluded from submitting a bid.

This RFP was prepared with the assistance of an external vendor, Setova Management Consulting GmbH (Setova). Setova will not participate in the RFP, as required by law.

The services put out to tender are already being managed by an external provider. However, this provider was in no way involved in the tender process and had no access to information concerning the tender. Nor is the incumbent involved in the evaluation or any other part of the RFP. All information necessary to answer the RFP successfully is disclosed in the tender and ensures that everyone has the same chance of winning.

#### **6.6. LANGUAGE OF PROCEDURE**

The language of the case shall be English. The documents shall be submitted in English or German.

#### **6.7. COMPENSATION / PITCH FEE**

No compensation is provided.

#### **6.8. PARTIAL OFFERS**

Partial offers are not permitted.

#### **6.9. VARIANTS**

No variants are permitted.

#### **6.10. DIVISION INTO LOTS**

There is no division into lots.

#### **6.11. SUBCONTRACTING**

Subcontractors are permitted but must be disclosed in the offer. Any subcontractors must be specified in the offer. It is the responsibility of the tenderer to ensure that the procedural principles and regulations required by S-GE are also observed by his subcontractors. The responsibility for the services provided by the subcontractors lies entirely with the provider. The communication between the subcontractors and S-GE takes place exclusively via the provider. Subcontractors may only be commissioned after prior consultation with S-GE.

The main volume (30%) as well as the main tasks must be performed by the main contractor.

Should the Provider consider subcontracting during the project or for the provision of the services or for the provision of parts of the services, the Provider must at least state the name and address of the subcontractor as well as the main area of responsibility during the project. S-GE must be informed, and the consent of S-GE must be obtained before using further subcontractors not identified during the project.

#### **6.12. BIDDING CONSORTIA**

Bidding consortia will not be considered.

#### **6.13. FINANCIAL INFORMATION**

Prices are to be quoted in CHF, excluding VAT.

#### **6.14. RESERVATION AND CONFIDENTIALITY**

The project approval and granting of credit by the responsible bodies of S-GE are expressly reserved.

All tender documents remain the property of S-GE. They may only be used for the preparation of the tender and must be returned if the contractor decides not to participate in the procedure. The tender documents can be made available to all bodies involved.

The vendor undertakes to treat the information and documents provided for the tender and received during the execution of the order as confidential and not to make them available to third parties.

The information provided by the vendor and the documents submitted are used exclusively for this selection procedure and will be treated confidentially. The vendor authorizes the contracting authority to verify the information provided in the bid.

The enclosed NDA must be accepted and signed by the vendor and by involved subcontractors.

#### **6.15. EXCLUSION CRITERIA**

In the event of non-compliance with the regulations explained in [Chapter 1.4](#) and [Chapter 5](#), S-GE reserves the right to take steps up to the exclusion of the relevant contractual partner/event agency from the tendering procedure.

#### **6.16. ADDITIONS TO THE TENDER DOSSIER**

Before the deadline, S-GE may, on its own initiative or as a result of questions submitted or other new information, make additions and amendments to the tender dossier. Such changes will be communicated in writing to all contract partners and are binding for them.

The bid must be submitted in the structure defined in the tender documents. Forms are to be completed in the specified form.

#### **6.17. MODIFICATIONS AND WITHDRAWAL OF OFFERS**

The contracting partner can change or withdraw participation to the tender or a submitted offer before the deadline "Submission of offer" by means of a written notification. After expiry of the deadline for "Submission of offer", changes or withdrawals of the offer are no longer possible.

#### **6.18. VALIDITY OF THE OFFER**

The offer submitted is valid for at least until 31.01.2024.

#### **6.19. INFORMATION ON LEGAL REMEDIES**

An appeal against this invitation to tender may be filed in writing within 20 days of publication with the Swiss Federal Administrative Court, St. Gallen (Switzerland). The notice of appeal must be submitted in duplicate. It must contain a request, a statement of the facts and a statement of reasons. The contested invitation to tender must be enclosed. The evidence appealed against must be described precisely and, as far as possible, enclosed.

#### **6.20. PLACE OF JURISDICTION**

The provider is subject to Swiss law during the tender procedure and later during the service in the event of an award. The place of jurisdiction for disputes is Zurich (Switzerland).



## 7. Evaluation and Selection

### 7.1. SELECTION PROCEDURE

The identification of the most suitable company is carried out as follows:

1. Offers are assessed against the formal criteria (preliminary check). Offers that do not meet these formal requirements are excluded from the further procedure without further examination.
2. Offers are assessed against eligibility criteria (EC). Eligibility criteria are mandatory criteria and each of the EC will get one of the two possible status: "Fulfilled" or "Not Fulfilled". If one or multiple EC's of an offer have the status "Not Fulfilled", the offer will be excluded.
3. All remaining providers are evaluated against the selection criteria (SC1-4) described below.
4. The best ranked suppliers, that still have the possibility to win the tender, but in maximum three, will be invited to the presentation.
5. The provider with the highest score out of all selection criteria (SC1-SC5) wins the tender.
6. The winning company (of the total evaluation of SC1-SC5) is invited to the next phase for contract conclusion. S-GE reserves the right to extend contract conclusion to additional participants and/or to terminate contract conclusion with individual or all participants at any time.

### 7.2. PRELIMINARY CHECK BY S-GE

Only offers that have been received by S-GE by the deadline will be opened. The opened offers are checked for formal correctness. The formal requirements must be fulfilled for admission to the evaluation or will be excluded otherwise. These include:

- Formal criteria
- Deadline for submission
- Complete documents and annexes, in particular submitted full self-declaration
- Structure of the offer according to a predefined grid
- There are no unauthorized changes (deletions, additions).
- Legitimate signatures are provided under the offer and under the required enclosures

The remaining offers will be further evaluated.

### 7.3. ELIGIBILITY CRITERIA

The eligibility criteria must be met by the applicant companies and any subcontractors, otherwise the application for participation will be excluded from further evaluation.

Any (subsequent) violation of the eligibility criteria or technical specifications will result in exclusion from the procedure or withdrawal of the contract.

The eligibility criteria listed below must be fully documented, without restriction or modification, by means of the required proof of suitability and submitted with the application. Otherwise the application will be disqualified. All evidence must be provided in the listed annexes.

EC No.	Eligibility criteria (EC)	Verification
EC01	Extract from the commercial register & extract from the debt collection register	Extract from the commercial register, not older than three months Extract from the debt collection register, not older than three months
EC02	Self-declarations (General and Ukraine)	<ul style="list-style-type: none"><li>• The workplace health and safety provisions and employment conditions applicable at the place of performance</li><li>• The notification and authorisation duties in connection with combating illegal employment</li><li>• The provisions on the protection of the environment and the conservation of natural resources applicable at the place of performance</li><li>• The anti-corruption provisions (especially in accordance with the Swiss Criminal Code, the Federal Act on Unfair Competition and the Federal Act on Cartels and Other Restraints of Competition)</li><li>• The provisions on the equal treatment of men and women in</li></ul>

		terms of equal pay • etc.
EC03	Market position and experience	The applicant company has, at the moment of tender submission, the necessary size (min. 10 permanent employees), a sufficiently broad customer base and expertise to cover and deliver the requirements described in this call.
EC04	Central Point of Contact	Assurance that one person is available as a central point of contact for S-GE and that this person can work for S-GE in Switzerland at any time if required.
EC05	Language competence	Assurance that the personnel engaged have a command of written and spoken English (C1). English is a must, German an advantage.
EC06	Capacity availability	Assurance that sufficient capacity is available to fulfill the requested services.
EC07	Work Permit for Switzerland	Assurance that the assigned personnel can work for S-GE in Zurich at any time and at short notice (visa, work permit, etc.).
EC08	Company references	Confirmation and proof of services provided to at least three companies comparable to the request of S-GE and in accordance with the requirements of the request.
EC09	Agile project management experience	Examples of services for at least three companies in an agile project process and their integration into the development processes.
EC10	Non-Disclosure Agreement	Signed Non-Disclosure Agreement
EC11	General Terms of Conditions	Acceptance of S-GE's general terms and conditions (SIK ToC)
EC12	Formal requirements	The application must be complete and in the form requested in this RfP.
EC13	Time zone availability	Availability to Swiss office hours
EC14	Subcontractor share	Volume (CHF) of subcontractors shall not be greater than 30% of total offer volume

The following details are also given in RFP\_BI\_Annex-06 "List of eligibility criteria".

- Detailed description of the individual criteria
- Minimum requirements to be met per sub-criterion
- Evidence to be submitted per sub-criterion

The form is an integral part of the tender. It must be completed in full, signed and legally binding and enclosed with the application.

If one of these mandatory criteria is not met, the application must be excluded from further examination.

## 7.4. SELECTION CRITERIA

The offers will be evaluated according to the selection criteria listed below. The evaluation of the criteria is carried out by the evaluation team by checking the offer documents and the presentation performance of the provider against the evaluation grid. The following overviews show the maximum achievable points.

SC No.	Selection criteria (SC)	Weight	Max Points
SC1	General impression and expertise of provider's company	10%	1000
SC2	BI Experience	25%	2500
SC3	Team Set-up & way of working	15%	1500
SC4	Price	30%	3000
SC5	Presentation	20%	2000

The evaluation results of SC1, SC2, SC3 and SC4 will determine the selection of the suppliers for the presentations.

#### 7.4.1. General impression and expertise of provider's company (SC1)

SC No.	Key words	Selection criteria (SC)	Weight	Max Points
SC1_A	General Impression	General impression of supplier's company capability to provide the requested services and overall fit to S-GE	25%	250
SC1_B	Framework contract	Degree of acceptance of the proposed framework contract	25%	250
SC1_C	Size	Size and scalability of data team	20%	200
SC1_D	Skills	Existence of relevant BI-knowledge and skill set based on skill-matrix	30%	300
		<b>TOTAL</b>	<b>100%</b>	<b>1'000</b>

#### 7.4.2. BI experience (SC2)

SC No.	Key words	Selection criteria (SC)	Weight	Max Points
SC2_A	Understanding	Understanding of S-GE, current situation and tender	5%	125
SC2_B	Strategic Advisory	Ability to act as strategic advisor for mid- to long-term planning, incl. architecture, roadmap and use cases	15%	375
SC2_C	Operational Sparring	Ability to act as operational sparring partner on data and analytics topics	15%	375
SC2_D	Case 1	Solution/approach to case 1	25%	625
SC2_E	Case 2	Solution/approach to case 2	25%	625
SC2_F	Case Studies	Proven relevant experience, based on case studies from other clients	15%	375
		<b>TOTAL</b>	<b>100%</b>	<b>2'500</b>

#### 7.4.3. Team Set-up & way of working (SC3)

SC No.	Key words	Selection criteria (SC)	Weight	Max Points
SC3_A	Account Lead I	Experience and availability of proposed account lead for S-GE	25%	375
SC3_B	Team Setup	Proposed team set-up, incl. size, roles and skills	30%	450
SC3_C	Collaboration	Proposed working mode and ability to work strongly integrated with the S-GE team	30%	450
SC3_D	Demand Fluctuations	Ability to handle high and low demand periods	15%	225
		<b>TOTAL</b>	<b>100%</b>	<b>1'500</b>

People are key. Not only as individuals but also as a team. Please provide a clear overview of your team underlined by essential details. Also describe how you plan to balance possible demand fluctuations. For the evaluation especially important is the consideration of the existing S-GE organization and processes. We want to understand how you incorporate your team and processes into S-GE (how you plan to work with our team, to manage human interfaces etc.).

#### 7.4.4. Price (SC4)

SC No.	Key words	Selection criteria (SC)	Weight	Max Points
SC4_A	Day Rate	Average day rate (excl. expenses)	20%	600
SC4_B	Total Price	Total price of the offer (incl. expenses for x% onsite work)	30%	900
SC4_C	Rate Card	Rate card of roles proposed in team setup, incl. validity period (excl. expenses)	40%	1200

SC4_D	Expenses	Share of expenses of total price	10%	300
		<b>TOTAL</b>	<b>100%</b>	<b>3'000</b>

For the evaluation of price the linearly truncated method (linear gekürztes Verfahren) will be applied.

#### 7.4.5. Presentation (SC5)

SC No.	Key words	Selection criteria (SC)	Weight	Max Points
SC5_A	Presentation Content	Comprehensibility, story-line and relevance of content of presentation	35%	700
SC5_B	Team	General impression of team, its handling of the presentation and chemistry fit	40%	800
SC5_C	Q&A	Quality of answers during and after presentation session	25%	500
		<b>TOTAL</b>	<b>100%</b>	<b>2'000</b>

At the provider presentation the offer in general, the cases, your BI-experience as well as your way of working and team setup (incl. key persons) are expected to be presented. We expect the key persons to be present to get a personal impression of the resources and the team.

#### 7.5. RATING SCALE

An evaluation team evaluates the bid including all annexes according to the selection criteria specified in this specification. The following rating table provides the providers with an overview:

Score	The responses are...	Points
4	qualitatively excellent, very great contribution to the achievement of objectives	100%
3	qualitatively good, better than average	75%
2	average quality, in accordance with the requirements of the tender	50%
1	information without sufficient reference to the project	25%
0	insufficient, incomplete information or not covered at all	0%

The evaluation is carried out in a linear way.

S-GE reserves the right, if necessary, to verify and, if necessary, correct the information provided by the offering company in the offer documents so that an objective comparison of the offers is possible.

## 8. Annexes

The following annexes are made available to applicant companies for download on [simap.ch](http://simap.ch):

	Description	File name
01	Non-disclosure Agreement	RFP_BI_Annex01
02	General Terms and Condition (Acceptance)	RFP_BI_Annex02
03	General Terms and Conditions	RFP_BI_Annex03
04	Self-Declaration General	RFP_BI_Annex04
05	Self-Declaration Ukraine	RFP_BI_Annex05
06	Eligibility criteria The catalog of eligibility criteria must be completed in full by the contracting partner and signed by it with a legally binding signature. The electronic template in the annex must be used for this purpose.	RFP_BI_Annex06
07	Data Privacy Agreement	RFP_BI_Annex07
08	Framework Agreement	RFP_BI_Annex08
09	Price Sheet	RFP_BI_Annex09