

PEE Annex 1 – Technical Specification with Evaluation Criteria and Principal Contract Terms

1. Aim of the procurement

- 1.1. The aim of the procurement is to procure a modern CRM (Customer Relationship Management) software for the Tallinn Kultuurikatel, which supports daily sales and project work, planning and managing events in a calendar view, managing offers and invoices, and reporting.
- 1.2. The software must enable the management of the events of all the event centers of the Kultuurikatel in one software and manage calendars, sales activities and customer data by the departments of the institution, which are the Tallinn Kultuurikatel, the Mere Kultuurikeskus and the Salme Kultuurikeskus.
- 1.3. The software must support an all-in-one integrated next-to-end solution:
 - 1.3.1.CRM customer communication that is integrated with projects and finances, i.e. a 360-degree view of customers, including contact information, communication history, projects and purchase invoices;
 - 1.3.2.Sales Pipeline;
 - 1.3.3.Integrated calendar and resource scheduling – built-in to manage the following resources: facilities, people, tasks, invoices, quotes, rental orders, projects, time tracking. Events in the calendar can be linked to contact offers, tasks, tasks, invoices, and projects. Can be synced with external calendars such as Google Calendar.
 - 1.3.4.Creating quotes that can be created and converted into contracts and invoices;
 - 1.3.5.Invoice management and invoicing directly in the system. It is possible to create invoices for logged time or from a quote. Compatible with Finbite.
 - 1.3.6.Time tracking – takes into account project and activity hours;
 - 1.3.7.Project management – tasks, calendars, resources, time and attendance. Covers the entire project lifecycle, from quoting and planning to execution and invoicing. Features also include Gantt charts, resource scheduling, and real-time progress tracking.
- 1.4. The system must also allow for:
 - 1.4.1.Separate workflow and data management for each division;
 - 1.4.2.A unified overview across all event hub events and resources;
 - 1.4.3.use of the same system by different users according to their rights and subdivisions;
 - 1.4.4.Calendar view to schedule events and resources across all items;
 - 1.4.5.Tracking sales, project, and billing processes at the level of all units.

2. Object and volume of the procurement contract

- 2.1. Within the framework of the procurement, CRM and sales software usage licenses will be procured for 20-35 users, along with the following services:
 - 2.1.1. Setting up and adapting the system according to work processes;
 - 2.1.2. User setup and comprehensive training;
 - 2.1.3. import of existing data (the entire 10-year history of the current system, integrated calendar, contacts, offers, projects, invoices) within no more than 10 working days after the conclusion of the contract (the Kultuurikatel and Salme use Scorio, the Mere does not have CRM software);
 - 2.1.4. Software updates and support.

3. Formal and substantive requirements for the offer

- 3.1. The tender must be submitted to the Public Procurement Register. The content and form requirements of the tender can be found on the page of the conditions of compliance in the Public Procurement Register.
- 3.2. The contracting authority shall declare the tender compliant if it complies with the conditions set out in this technical specification and other basic documents of public procurement. The contracting authority shall reject the tender if it does not comply with the conditions set out in the source documents of the public procurement, if the tenderer fails to submit the explanations requested by the contracting authority by the deadline or if it is not possible to unambiguously assess the compliance of the tender with the conditions set out in the source documents of the public procurement on the basis of the tenderer's explanations. The contracting authority may declare the tender compliant if there are no substantive deviations from the conditions specified in the source documents of the public procurement. A rejected tender is not subject to evaluation.

4. Technical and functional requirements

Functional requirement	Explanation / Purpose
4.1. CRM customer communication is integrated with projects and finances, i.e. a 360-degree view of customers, including contact information, communication history, projects and purchase invoices;	Provides a complete view of client and project data and reduces manual work.
4.2. The pipeline must be customizable and allow you to track deal stages, activities, and forecasts.	Supports sales management and more accurate forecasts.
4.3. The calendar must be manageable and have rooms, employees, tasks, quotes, rental orders, and projects associated with the calendar, and the calendar must be	Provides a unified planning view.

synchronizable with Google Calendar and Outlook.	
4.4. The system must enable the preparation of offers, their conversion into contracts and the generation of invoices based on the offer or logged time.	Unified sales, contract, and billing workflow in one system.
4.5. The software must be compatible with Finbite and other e-invoicing services.	Enables automatic forwarding and receipt of e-invoices.
4.6. The system must support working time tracking and connection to projects.	Enables accurate cost and profitability calculations.
4.7. The project management module must include Gantt charts, resource planning, and real-time tracking of project processes. Enables comprehensive project management and monitoring throughout the lifecycle.	Enables comprehensive project management throughout the lifecycle.
4.8. The system must enable the separation of data and workflows by sub-units, including the Tallinn Kultuurikatel, the Mere Kultuurikeskus and the Salme Kultuurikeskus.	Ensures operational autonomy for units and a common data platform.
4.9. User access and rights must be manageable on a role-by-role and sub-unit basis.	Ensures security and data protection.
4.10. The calendar must be viewed and managed across events and resources in all divisions.	Provides a consolidated view of the entire organization for planning.
4.11. The system must enable reporting on sales, project and billing processes at the level of the sub-unit as well as the entire institution.	Supports management decisions based on KPIs in one consolidated view.

5. Additional Functional Requirements

- 5.1. In addition to the general requirements above, the system must support the following specific work processes of the event centre:
 - 5.1.1.Resource-based calendar and time management (to-do);
 - 5.1.2.Rental warehouse and creation of rental orders;
 - 5.1.3.Price offers with product codes and price lists;
 - 5.1.4.Manage sales invoices and prepayment invoices;
 - 5.1.5.Sales pipeline, sales team, and sales activity reports;
 - 5.1.6.Summary of work and detailed report (with time and project-based analysis);
 - 5.1.7.Separate app for use on mobile phones (iOS and Android).

5.2. Other requirements

5.2.1. User support in Estonian

5.2.2. User interface in Estonian

6. Evaluation criteria

6.1. The contracting authority shall evaluate the tenders declared compliant on the basis of the following criteria:

Criterion	Description
1. Cost - 60%	The cost of licenses is 12 months without VAT (35 users are taken into account in the evaluation)
2. Implementation and transition costs – 20%	Set-up, training and data transfer costs without VAT
3. User-friendliness and suitability of the work process – 20%	User interface logic, system intuitiveness, and users' existing experience

6.2. Evaluation methodology

6.2.1. For the criteria "implementation and transition costs" and "cost", the tender with the lowest value will receive the maximum number of points. Other tenders will receive points by calculating the formula indicated on the relevant Public Procurement Register tab.

6.2.2. The evaluation methodology for the criterion "User Convenience and Suitability of the Work Process" is as follows:

Sub-criterion/points	10	5	0
User-friendliness	The user environment presented as a demo is convenient for the user. The user environment has all the functionalities required by the technical specifications. Description of the environment is detailed and unambiguous. The demo environment and description provide a set of the contracting authority is satisfied that the	The user environment presented as a demo is generally suitable for the user, but there are some inconveniences. The description of user-friendliness is partly unclear and/or ambiguous. Demo keskkond	The prerequisites for receiving 5 points are not met.

	<p>the service provided meets the expectations set by the contracting authority.</p> <p>In order to ensure user-friendliness, the usual principles of the field and the activities of the contracting authority in accordance with the statutes have been taken into account.</p>	<p>ja Description as a whole does not convince the contracting authority that the service fully meets the requirements set out in the procurement. In order to ensure user comfort, the usual principles of the field have not been applied. The tenderer has not taken into account the specifics of the contracting authority in creating user-friendliness.</p>	
Suitability of the work process	<p>In the demo environment, the work process corresponds to the technical specifications and the objectives of the procurement. The work process is also explained in detail and unambiguous, including when and how the activities are planned and whether it is possible to achieve the result on time. The specifics of the supplier have been taken into account when creating the demo environment and describing the work processes.</p>	<p>In a demo environment, the work process is not convenient. The work process itself and/or its description is partial and/or ambiguous. The specifics of the vendor have not been taken into account when creating the demo environment and work processes.</p>	<p>The prerequisites for receiving 5 points are not met.</p>

6.3. The contracting authority will declare the tender that receives the most points as successful.

7. Terms and conditions of the contract (in principle)

- 7.1. The contracting authority shall enter into a contract with the successful tenderer and a data processing contract on the basis of the tenderer's standard terms and conditions to the extent that it is not in conflict with the provisions of this chapter.
- 7.2. Duration of the contract: 48 months from the start of the system, with the possibility of annual renewal. The contracting authority undertakes to notify of their wish to extend the extension at least 30 days before the end of the billing period.
- 7.3. The contracting authority undertakes to order at least 20 user licenses (minimum quantity).
- 7.4. The contracting authority pays for one user license according to the unit price specified by the service provider in the offer.
- 7.5. The service provider has the right to increase the license fee once a calendar year according to the change in the consumer price index (CPI), based on the percentage of change in the Estonian consumer price index for the last 12 months published by Statistics Estonia compared to the same period of the previous year.
- 7.6. The price correction is based on the last CPI indicator published before the price change takes effect.
- 7.7. The service provider shall notify the contracting authority of the price increase at least 60 (sixty) calendar days before the start of the new billing period when the adjusted price is applied.
- 7.8. If the CPI change is negative, the royalty will not be automatically reduced unless the parties agree to this in writing.
- 7.9. The service provider ensures the reliability of the system and technical support throughout the validity of the contract.
- 7.10. The contracting authority may cancel the contract if the system does not meet the requirements or the service is not functional in the agreed volume.
- 7.11. Data ownership and transfer
 - 7.11.1. The data entered into the software by the customer belongs to the contracting authority. Upon termination or expiration of the contract, the service provider shall close the respective accounts and, unless otherwise agreed, delete their contents within the term set out in the data processing agreement. The service provider does not delete content that is required to be retained under applicable law.
 - 7.11.2. The service provider undertakes to make a copy of the content available to the contracting authority within 30 days following the expiry or expiry of the contract and the contracting authority undertakes to download it. If the contracting authority is unable to download a copy of the content in accordance with the procedure provided for in this clause, the contracting authority undertakes to notify the service provider thereof within 10 days of becoming aware of the obstacle. In such a case – provided that the content has not been deleted in accordance with the data processing agreement – the service provider undertakes to deliver the content to the contracting authority in a

generally accepted format by agreement of the parties. No additional fee may be charged for the transmission of content.

7.12. The parties and persons acting on their behalf are obliged to adhere to the anti-corruption legislation in force in the Republic of Estonia.

7.12.1. The service provider is prohibited from entering into agreements with persons acting on behalf of the contracting authority and with persons related to them within the meaning of § 7 of the Anti-Corruption Act in connection with the performance of the contract, giving them gifts or benefits in connection with the performance of the contract that cannot be unambiguously understood as an ordinary expression of courtesy within the meaning of § 4 of the Anti-Corruption Act, or from placing them in a situation that may result in an actual or apparent conflict of interests.

7.12.2. If the service provider organizes events within the framework of its business activities to which the person(s) acting on behalf of the client in connection with the performance of the contract are invited, the purpose of these events must not be to influence persons related to the client and hosting such events must remain within the framework of a customary courtesy statement.

7.12.3. The service provider shall implement measures to prevent corruption by people acting on its behalf, its subcontractors or other third parties related to the service provider in connection with the performance of this contract.

7.12.4. The service provider and the contracting authority, as well as persons acting on their behalf, undertake to cooperate with each other in the implementation of anti-corruption measures, including immediately informing each other of any suspicions of a corruption case related to the performance of the contract.

7.12.5. The contracting authority has the right to cancel the contract if the service provider violates anti-corruption legislation or has violated the anti-corruption measures prescribed in the contract.