

WORKSHOP REPORT

Innovation Procurement Case Studies and Practitioner Exchange between public sector organisations and innovation procurement experts

26 SEPTEMBER 2023, MAAT – MUSEUM OF ART, ARCHITECTURE AND TECHNOLOGY, LISBON



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CONTEXT + CONCEPT + OBJECTIVES

CONTEXT

The Workshop is a product of the “Workshops and Training” service of the Competence Center for Innovation Public Procurement – PROCURE+i, supported by the SAMA/SATDAP - Compete 2020 instrument, an initiative of the National Innovation Agency and the Institute of Public Markets, Real Estate and Construction, I.P.

A **support document** was produced to provide a framework for what is expected to be developed, anticipating the participants’ attention to the topics to be reflected on, as well as providing guidance for the development of the procedures during the workshop, to better facilitate its progress and ensure the objectives are achieved. The document also provides introductory information about the cases presented and the speakers. You can access it as part of the annexes of this report.

CONCEPT

A one-day workshop and networking event to bring together an invited group of innovation procurement enthusiasts from across the national public sector. To hear directly from their peers 'innovation procurement stories from the front line', providing an opportunity to dive deeply into the detail of the implementation and outcomes of three innovation procurements implemented outside Portugal (cases). The aim of the thematic session is to create an informed cohort of innovation procurement enthusiasts, early adopters, and leaders in Portugal and inspire the actualization of innovation procurement projects.

OBJECTIVES

- a) Encourage and inspire by example the practice of innovation procurement.
- b) Demystify through direct contact with practical cases, technical and non-technical barriers for the implementation of innovation procurement.
- c) Create a core of pioneering innovation procurement contracting authorities.
- d) Inspire and enable action in initiating an innovation procurement.

TEAM + PROGRAMME + PARTICIPANTS

TEAM

Institution	Name + Role
ANI – National Innovation Agency	Luís Ferreira – host and facilitator André Balças - assistant
IMPIC - Institute for Public Markets, Real Estate and Construction	Sandra Simões - host Alexandra Rodrigues - facilitator Sandra Mascarenhas - assistant

WORKSHOP PROGRAMME

Each case was presented (25 mins) and then discussed in facilitated break out groups of around nine people (40 mins). Two cases were presented and discussed in breakouts before lunch and the final case presented and discussed after lunch in plenary. The workshop was held as a confidential event to enable participants to freely share their experience.

SCHEDULE

08.30	Registrations and coffee
09.00	Welcome and introduction to the day
09.10	Innovation procurement in Portugal
09.20	Icebreaker and introductions
09.30	IPP CASE 1: “Extensive transformation of a public building using innovation procurement”. Denis Premec, Regional Energy Agency North, Croatia.
	<i>Hand over</i>
10.00	IPP CASE 2: “Adoption of ICT to improve quality and efficiency of domiciliary care services through innovation procurement”. Ann Williams, Liverpool City Council, United Kingdom.
10.30	Chair explains the breakout discussions: Exploratory case-based discussions in two smaller groups with rotating speakers
10.40	<i>BREAK and moving into rooms</i>
11.00	Breakout Session 1
11.40	<i>Swop over speakers between rooms</i>
11.45	Breakout Session 2
12.30	<i>Lunch</i>
13.30	Introduction to the afternoon session
13.45	IPP CASE 3: “Decentralized storm water management”. Lene Stolpe Meyer, Municipality of Frederiksberg, Denmark.
14.15	Round table exploratory discussion
15.00	Small group discussions (5 people per group)
15.40	Feedback
16.00	Closing comments and invitation to networking
17.00	Event ending – cocktail networking

PARTICIPANTS

Nine public entities were directly invited to participate in the workshop, by designating two elements each, ideally one from their procurement and other from the business side. In total, the workshop had **17** participants.

LIST OF PARTICIPANTS

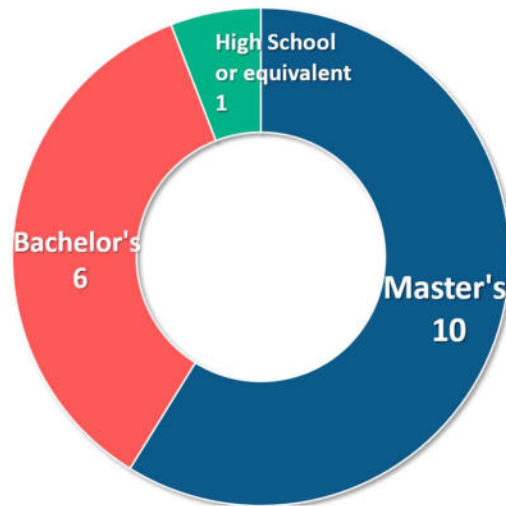
Institution	Name
ANI – National Innovation Agency	Bruno Miguel Maia de Oliveira
APAH - Portuguese Association of Hospital Administrators	Helder Duarte de Almeida Pedro Almeida
CHUC - Coimbra's University Hospital	Patrícia Couceiro Ricardo Mota
Intermunicipal Community (CIM) - Tâmega e Sousa	Jorge Jesus Mário Júlio
Infrastructures of Portugal	Leonor Beja da Costa Tomás Viegas
INPI – National Institute of Industrial Property	Maria Fernanda Pimenta Teresa Colaço
Portuguese Navy	Bruno Carvalho Catarina Fradique
Lisbon Municipality	Gonçalo Negrão Maria Manuela Filipe
Oporto Municipality	Ricardo da Costa e Silva
Portuguese Criminal Police	Ana Sofia Almeida

CHARACTERIZATION OF PARTICIPANTS

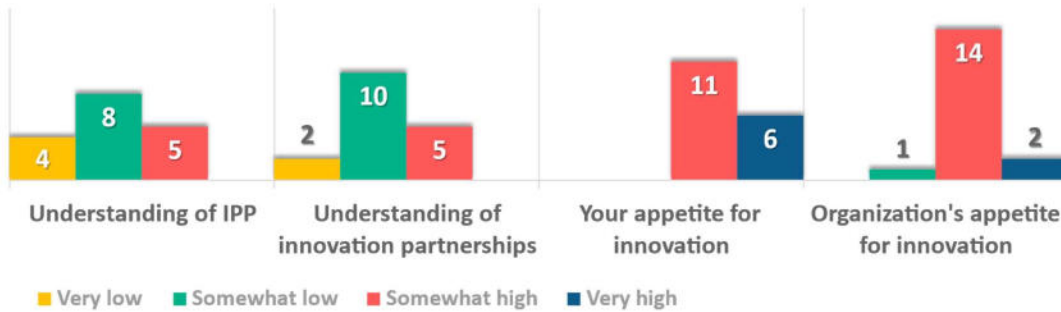
The participants were asked to fill in a pre-workshop survey to assess their familiarity with the theme of the event and their level of knowledge regarding IPP. Here are the results of that survey:

- **14** participants have 20+ years of professional experience.
- **8** participants have been in their current role for 3 years or less (and 6 for 7+ years).
- **8** are in a procurement position.

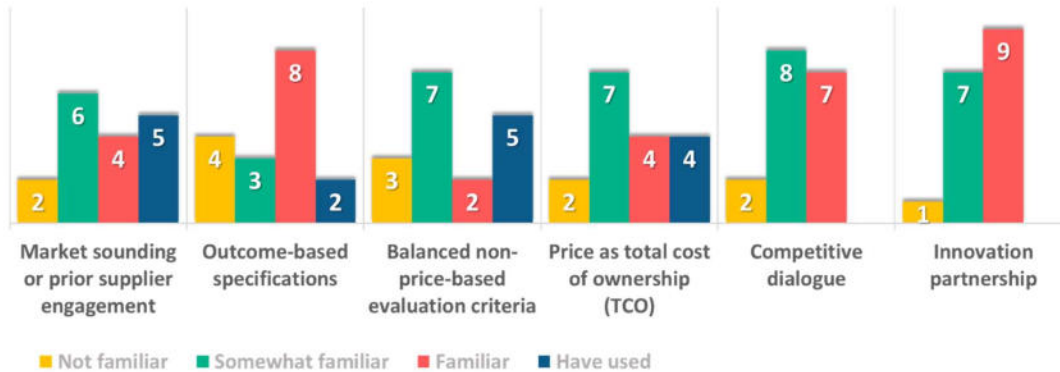
Graph A – Participant’s academic education



Graph B – How would you rate...



Graph C - Which of the following mechanisms are you familiar with or have you used, that can be considered as enabling innovation in tendering?



The whole group expressed high expectations to learn and acquire practical knowledge about IPP, here some statement examples:

“Get more tools to leverage innovation in public procurement; sharing experiences about successes/failures, difficulties, lessons learned.”

“I expect to obtain practical insights regarding innovation procurement cases.”

“Better understanding of the topic and the lessons learned within the case studies that will be presented.”

“Learn about real cases and check possible use in my organization.”

Some participants also raised questions they would like to see discussed during the workshop, such as:

“How to buy innovation without qualified technical staff?”

“Procurement and Innovation aren't these areas, in fact, just ONE?”

“What strategies can we adopt to deal with the aging of workers, as well as resistance to changing processes, when planning Innovation procurement?”

“How can we increase speed and procedural simplicity of the Partnership for innovation mechanism to make it more attractive?”

WORKSHOP ACTIVITIES + RESULTS

BREAKOUT SESSIONS

To further explore the two cases in the morning beyond the presentations and foster a Q&A dynamic, the participants were divided in two groups and put in different rooms along with the case presenter of case 1 for one group, and the case presenter of case 2 for the other group. Each parallel session lasted around 45 minutes switching the speakers between groups. The exploratory session for case 3 run in a round table format, with the whole group of participants working in the same room.

The team of facilitators helped with the discussions and addressed as far as necessary questions to the case presenters highlighting the key aspects of the respective case delivered during the presentations.

Among others it can be highlighted some important learnings form each case:

CASE 1

“Extensive transformation of a public building using innovation procurement”. Denis Premec, Regional Energy Agency North, Croatia.

A particular example of successful low scale investment and mind set changing which demonstrates the possibility to introduce innovations – incremental level, to satisfy a genuine unmet need of a municipality, owner of a building rehabilitation problem, using a negotiation procedure.

CASE 2

“Adoption of ICT to improve quality and efficiency of domiciliary care services through innovation procurement”. Ann Williams, Liverpool City Council, United Kingdom.

The recognition of the importance of being determined defining the unmet need and the capacity to engage key stakeholders to leverage the required technological appropriation of the supplier – in particular health carers.

CASE 3

“Decentralized storm water management”. Lene Stolpe Meyer, Municipality of Frederiksberg, Denmark.

The methodology adopted in the innovation partnership promoted multidisciplinary collaboration, both internally (among Municipality employees) and externally. The Municipality highlights as a key factor the honesty of all stakeholders, on both sides, in sharing risks and opinions, and in managing expectations in order to foster mutual trust, which is essential for the good implementation of a co-development project.

The time invested in dialogues with the market and proposal negotiation meetings, prior to the start of the research and development project, greatly offset the level of prevention of subsequent errors that would have more negative externalities in terms of temporal and financial resources.

ACTIVITIES

POSTCARDS

In this first activity, each participant was given a postcard and asked to write to themselves, two challenges for the future in the context of IPP, i) “I challenge my organization to”; ii) “I challenge myself to”. The purpose of the activity was to let participants receive their own postcards by post, a few weeks after the event, with a live memory of what they wrote. It was considered as an encouragement to put through the necessary change about IPP in their positions and within their organizations!



Figure 1 – Both sides of the workshop postcard. The inner side contains 2 prompts: “I challenge my organization to” and “I challenge myself to”.

Among other aspects, participants challenged their organization to:

- “Conduct an internal workshop about IPP.”
- “Develop an IPP taskforce”
- “Provide more resources to the PP team.”
- “Embrace IPP and get rid of traditional thinking in procurement.”
- “Introduce sustainability criteria in its procurement procedures.”

And challenged themselves to:

- “Further explore potential ideas for an innovation partnership procedure.”
- “Teach and bring awareness to others about IPP”
- “Learn more and keep up to date about IPP.”
- “Help my organization engage with IPP.”

GROUP TAKEAWAYS

In the second activity performed, it was asked the group of participants to divide into three groups, avoiding the presence of elements of the same organization in the group. The proposal was to discuss and write down the main takeaways from the workshop. After doing it within the group, the collective contributions were gathered asking each group to share their takeaways with the others.

Case presenters also participated in both activities.

The next figures (fig. 2 – fig. 5) are a reproduction of the results from each group with several different takeaways. From each group, the most relevant ones that were identified are highlighted

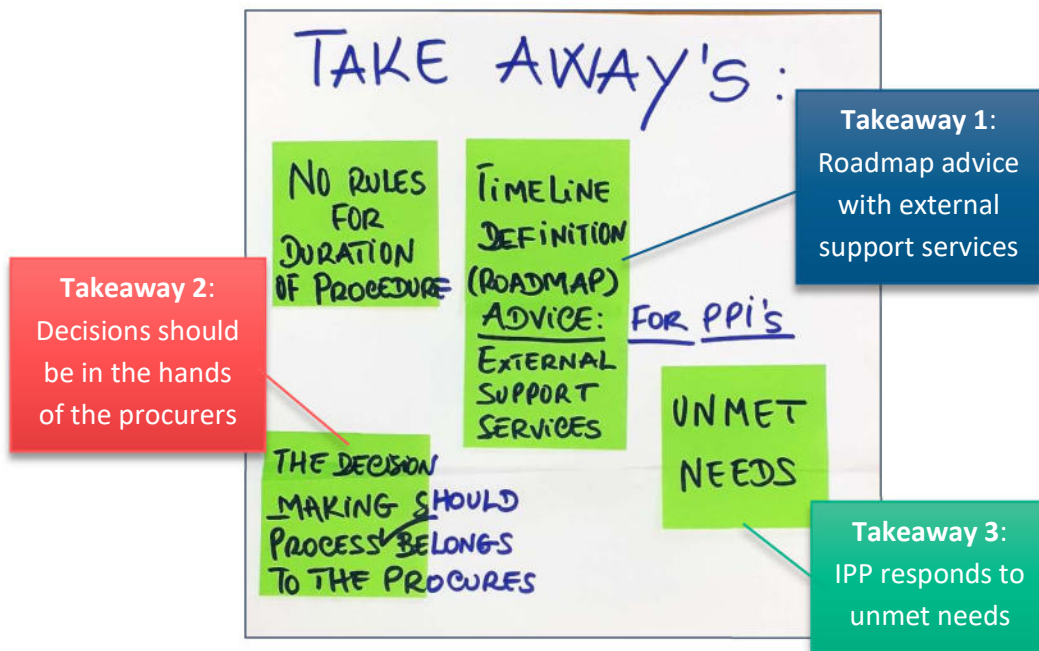


Figure 2 – Main takeaways from group 1

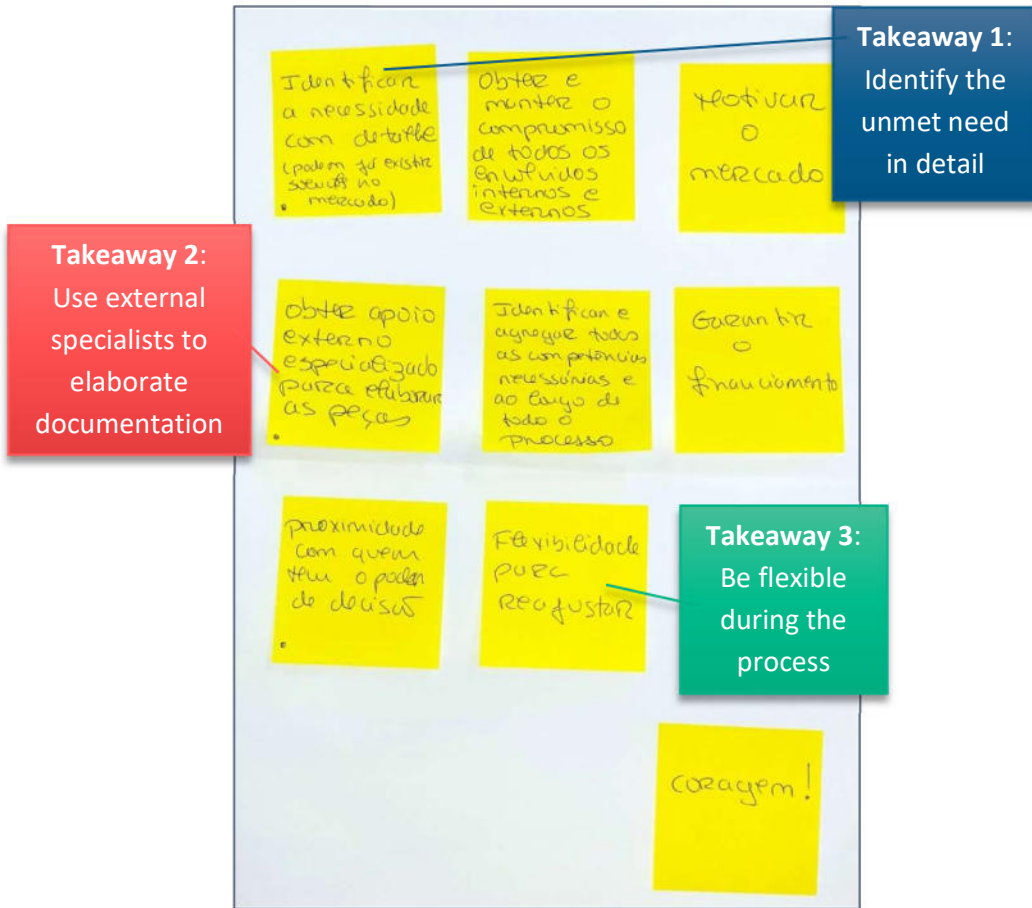


Figure 3 - Main takeaways from group 2

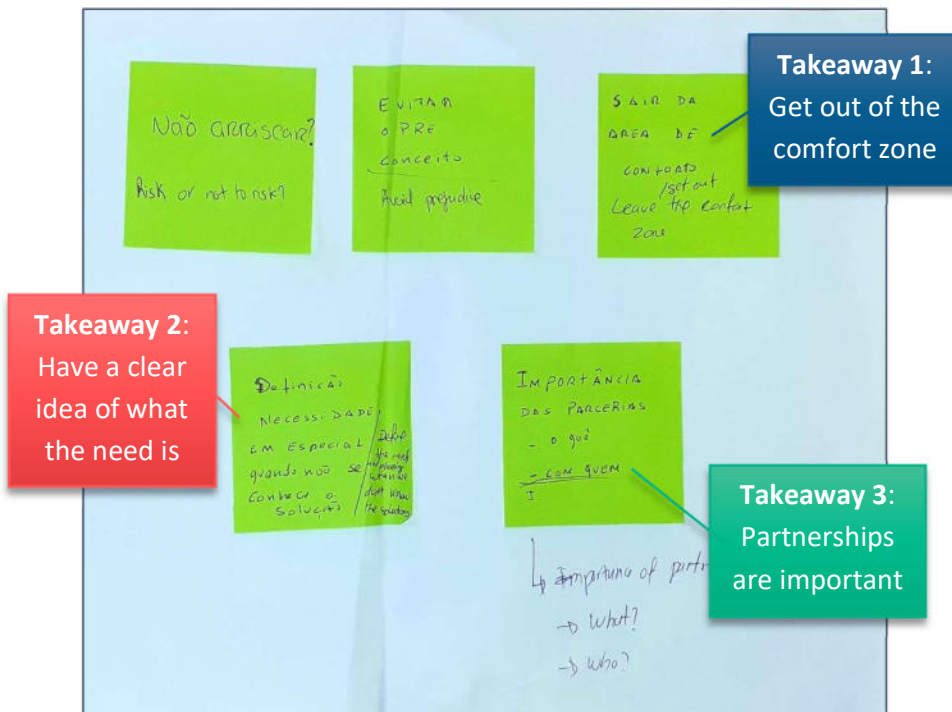


Figure 4 - Main takeaways from group 3



Figure 5 - Main takeaways from the case presenters' group.

CONCLUSIONS

Considering the purpose and the results of the workshop, it was possible to draw several conclusions.

As a general conclusion, it was demonstrated the benefits of the workshop concept, nevertheless a very demanding timing management was required, due to the natural interest of participants to go deeper into the discussions about the cases details.

Additionally, the workshop model proved to function in a more efficient way if all the participants are at least familiar with mechanisms enabling innovation in tendering. This was particularly evident when the "Innovation partnership" case was discussed.

With regards to the main objectives, it was found the capacity of each of the cases discussed to encouraged and inspire participants to implement innovation procurement practices in the future.

The material delivered and the direct contact with the experience of case presenters enabled participants to demystify technical and non-technical barriers for the implementation of innovation procurement.

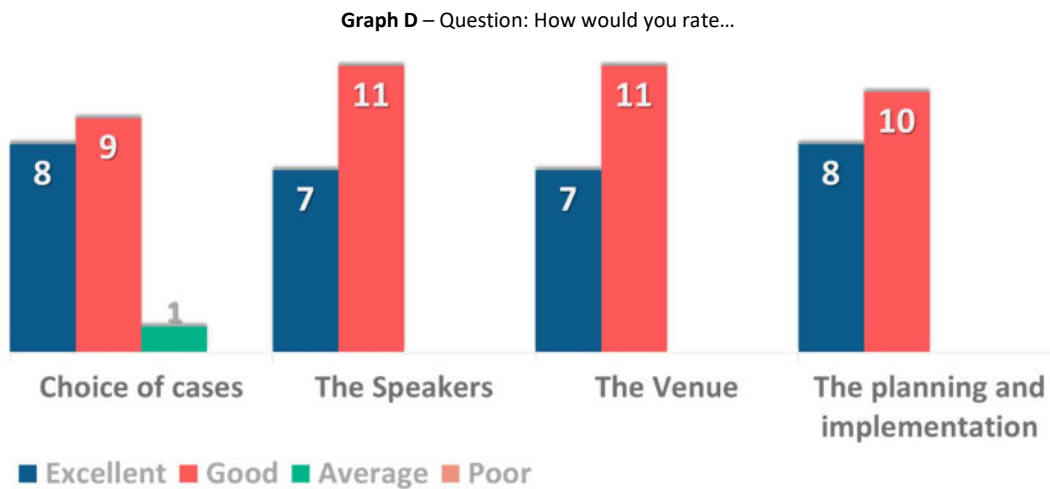
It was considered as valuable that PROCURE+I could lead the creation of a first nucleus of pioneering innovation procurement contracting authorities starting from a group of the participant entities.

FEEDBACK

FEEDBACK SURVEY

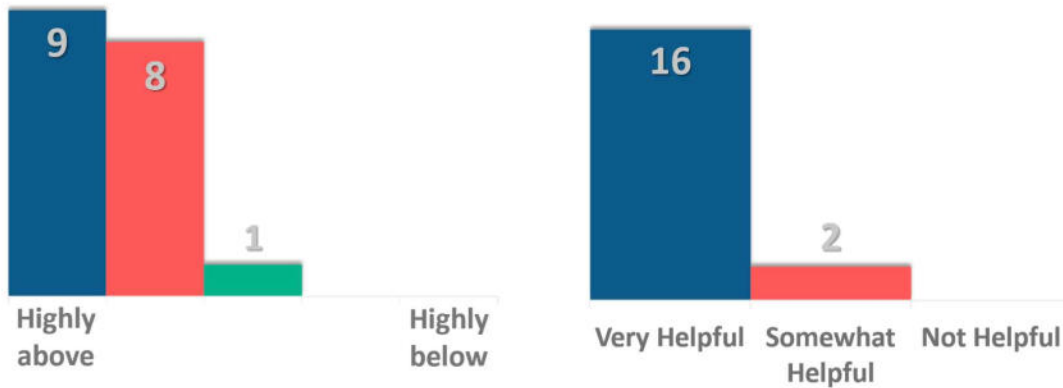
Participants and case presenters were asked to fill in a short survey at the end of the workshop, where they could rate different dimensions of the event. The results are shown below in graphic form.

Graphic D shows how the participants ranked various aspects of the event within a four-option scale, from *Excellent* to *Poor*.



Graphic E indicates how the participants evaluated the overall usefulness and their satisfaction with the event.

Graph E – Question (left): Did the workshop meet your expectations? Question (right): How helpful did you find the event?








The survey ended with a question to understand how willing the participants would be to continue to engage and collaborate with the Competence Centre.

Graphic F quantifies their responses.

Graph F – Question: Would you like to meet with PROCURE+i to explore ideas for an Innovation Public Procurement project?



ANNEXES

-  **Workshop Support Document**
-  **IPP CASE 1 presentation:** “Extensive transformation of a public building using innovation procurement”. Denis Premec, Regional Energy Agency North, Croatia.
 -  **IPP Case 1 supporting documentation [i) PIN; ii) Market sound prospectus; iii) Breakout session]**
-  **IPP CASE 2 presentation:** “Adoption of ICT to improve quality and efficiency of domiciliary care services through innovation procurement”. Ann Williams, Liverpool City Council, United Kingdom.
-  **IPP CASE 3 presentation:** “Decentralized storm water management”. Lene Stolpe Meyer, Municipality of Frederiksberg, Denmark.