

# **USING CONSULTANTS IN COMPETITIVE TENDERING**

Case: HUS Logistics

## Abstract

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Title of publication <b>Using consultants in competitive tendering</b> Case HUS Logistics		
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Abstract <p>Using consultants in competitive tendering can be a valuable resource for organizations. Outsourced resources such as procurement consultants have substance competence that can help contracting authorities have more innovative procurement and access to more resources.</p> <p>The theory section explains public procurement and competitive tendering complexities that consultants navigate and explores the characteristics of procurement competence that public procurement requires.</p> <p>This empirical study analyzes HUS Logistics 92 outsourced competitive tenders from late 2019 until 24.10.2020 to see if there are similarities or patterns that could help determine when to use consultants for competitive tendering and what defining qualities make an outsourced competitive tender a success. The research method was conducted by doing semi-structured interviews for HUS Logistics Procurement Director to understand the background, current status and future plans using consultants and four Category Managers that had outsourced competitive tenders.</p> <p>The conclusions that the research provided was that The Category Managers had similar motives, vision and strategy on when and how to use consultants. The option on whether to outsource competitive tender was always viewed case-by-case and seeing what the resources are inside the organization. Additionally, results from one of the Category Manager's interview revealed a more processed way on how and when they utilized consultants.</p>		
Keywords Consultant, Competitive tendering, Outsourcing, Public Procurement		

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## 1 INTRODUCTION

### 1.1 Basic concepts of procurement

In this chapter the basic concepts of procurement are presented below to help understand the special terminology of this thesis better.

**Competitive tendering** is a process in which a contracting authority invites goods and services suppliers and contractors to submit a tender to provide the needed goods or services. There are four principles that all competitive tendering must follow: transparent and efficient tendering and equality and non-discriminatory treatment of tenderers. (Ministry of Economic Affairs and Employment of Finland 2020c).

**Contracting authority** is defined in the Directive 2004/18/EC as an organization of the public sector that carries out public procurement activities and follows the Directivities that concern public procurement. In this thesis the contracting authority is HUS Logistics. (HUS 2020c).

**Invitation to tender (ITT) or Call for tender is** a formal document issued by the contracting authority. The invitation outlines the characteristics of goods and services and invites suppliers and contractors to submit a tender. (European Commission 2020).

**Procurement** refers to the act of obtaining goods or services. Procurement can refer to the final act of purchasing or the procurement process. (HUS Logistiikka 2020c).

**Procurement Cycle** is used to describe the procurement process step-by-step to identify all required stages of the procurement. (European Commission 2019).

**Procurement Department** is part of the contracting authority. Inside of the department works directors, managers, specialist, experts, lawyers, secretaries. The department issues orders, develops term contracts, handles tendering. (HUS Logistiikka 2020c).

**Procurement Legislation** means the national procurement legislation and the procurement directives of the European Union in which public procurements must be carried out. (Ministry of Economic Affairs and Employment of Finland 2020c).

**Procurement procedure** is a specified form of procedure to be used in public procurement. There are different types of public procurement procedures within competitive tendering. For example: open procedure, restricted procedure, competitive negotiated procedure, competitive dialogue, design contest and direct award. All procedures are different and should be applied for procurement best suitable for. (Your Europe European Union 2020).

## 1.2 Background of the research

HUS Logistics acts as a joint procurement unit for entire Helsinki and Uusimaa Hospital District (HUS) area and offers logistic services and medical engineering services for the joint authority. HUS Logistics customers are all HUS hospitals and treatment units, HUS member municipalities and the Helsinki University Hospital Specific Catchment Areas that are signed to service agreements.

HUS Logistics operates under the guidelines and values determined by HUS. HUS Logistics is one of the biggest contracting authorities in Finland procuring goods like supplies, equipment and services. Procurements are executed with the help and guidance of national procurement legislation and the procurement directives of the European Union and regulated procurement procedures.

At the end of 2019 the Finnish Competition and Consumer Authority (FCCA) announced that it had found several dozen product groups without competitive tendering. The decision to use consultants to help with these procurements was made and several consultant companies were selected. (Finnish Competition and Consumer Authority 2019; HUS Logistics 2020c).

Procurement legislation allows contracting authorities to use outsourced experts and consultants when it adds to the quality of the procurement and ensures equality in competitive tendering. With outsourced competitive tenders, contracting authorities can use several consultant companies or several different consultants within a consultant company.

Even though the use of consultant services is not new to many companies in these days, for HUS Logistics this was a newfound resource that made possible to execute competitive tendering on these product groups on time.

There were 92 competitive tenders that were outsourced to consultants according to a sampling taken from the Procurement Calendar in last quarter (Q4/2019) until 24.10.2020. (HUS Logistiikka 2020b).

## 1.3 Research questions, methods and limitations

The aim for this thesis is to analyze the 92 outsourced competitive tenders and see if there are similarities or patterns that could help determine when to use consultants for competitive tendering and if there are defining qualities that make an outsourced competitive tender a success.

## Research questions

This research aims to answer one main question and second supporting question. The theoretical framework is constructed from procurement literature, articles and charts to explain public procurement and competitive tendering. The framework of the thesis explains the rules and guidelines of public procurement and process of competitive tendering to which consultants must follow. The qualitative research method was conducted by doing semi-structured interviews for HUS Logistics Procurement Director and four Category Managers that had outsourced competitive tenders.

This thesis aims to answer these following questions:

1. When to use consultants for competitive tendering?
2. Are there defining qualities that make an outsourced competitive tender a success?

## Methods

The material for the interview questions formed with the help of procurement literature, HUS Logistics documents, Procurement Calendar and Calendar of Competitive Tendering. The Procurement Calendar sampling from 24.10.2020 provided the most vital data concerning all outsourced competitive tenders. In this research qualitative research method is used to collect data from the interviewees. The semi-structured interview method was chosen for its technique to capture accurate and in-depth insights from focus groups. These interviews act as primary sources for this research and help analyze the data from the Procurement Calendar, which acts as a secondary source to this research. In qualitative method multiple type of sources can be used to find solutions to the research questions. (Kananen 2015, 76.)

The theory section of this thesis is presented in chapters 2, 3 and 4. These chapters focus on the background and processes that the consultants need to navigate, what they encounter and what is expected of them when doing competitive tendering. Chapter 5 concentrates HUS Logistics background, current status and future plan to use consultant companies with HUS Logistics Procurement Director's interview. Chapter 5 also presents HUS Logistics process description for outsourcing competitive tenders.

The research section starts with chapter 6, where the research method is presented. Chapter 7 presents and analyzes the results of the Category Managers interviews.

## **Limitations**

Given that the use of outsourced procurement consultants is quite new for HUS Logistics, it is understandable that the data for this research doesn't date back to several years. This thesis analyzes its case company HUS Logistics 92 outsourced competitive tenders that date back from end of 2019 to 24.10.2020. No previous researches have been done to this subject.

Also, acknowledging the challenges and complexities that come from public procurement and understanding that this thesis may not provide an "one solution fits all" end result to its case company but rather find perspectives and similarities that the case company may utilize and further the studies of outsourcing in the future.



## 2 PUBLIC PROCUREMENT

Public procurements are being made for 35 billion euros in Finland yearly. Municipalities and Joint Authorities portion of these procurements is about 23 billion euros. (Ministry of Economic Affairs and Employment of Finland 2020b).

Public procurement refers to the process in which contracting authorities purchase goods, services and work. Procurement is done by contracting authorities. These authorities can be for example state authorities, local authorities and joint municipal authorities. HUS Logistics acts as a joint procurement unit for HUS, which means all HUS hospitals, treatment units, HUS member municipalities and signed service agreement partners in Helsinki University Specific Catchment Areas. (HUS 2020f).

Public procurement is regulated and procurement procedures must be done accordance with national procurement legislation and the procurement directives of the European Union. Funding for public procurement mainly comes from taxpayers' money and public funds, procurement regulation helps to use and monitor those funds effectively. The FCCA monitors compliance with legislation regarding public procurement to ensure transparency, non-discrimination and effective use of funds in public procurement procedures. (Ministry of Economic Affairs and Employment of Finland 2020c; Finnish Competition and Consumer Authority 2020).

Public procurements are expected to implement efficiency, integrity, promote strategic oversight and help bring economic impact. (OECD 2020a.)

### 2.1 Why public procurement is used?

Public procurement means acquiring goods such as supplies, equipment and services that improve quality, durability and productivity of public service. Public procurement implements the advice and guidance of public procurement and national procurement legislation and the procurement directives of the European Union. These procurement regulations help monitor the use of public funds more effectively and offer equal opportunities for suppliers. Public procurement is aimed to enhance quality, innovation and durability with every procurement. (Ministry of Economic Affairs and Employment of Finland 2020c).

Public procurement strategic goals and aims focuses on the whole lifespan of the procurement not just on the competitive tendering process. The objective in public procurement is to focus on the cycle of the procurement (Figure 1). If the cycle of procurement is successful, goods and services are delivered in a timely and efficient manner also implement-

ing the corporate responsibilities that address environmental, economic and social challenges. These strategic goals and aims help give perspective to contracting authorities to think cost factors, maintenance and making the transition from current supplier to a possible new one as smooth as possible. With healthcare procurement, the goal is to ensure best possible care. The environmental objectives should be addressed throughout the procurement cycle with policies to support green public procurement and consideration of energy efficiency, environmental considerations and life-cycle costs to procurement. The European Union has implemented the strategic use of public procurement into the 2014 public procurement EU directives. These directives allow more simplified and flexible procurement and encourage partition in tendering. (OECD 2017, 174).

## 2.2 Innovation in public procurement

There are over 250 000 public authorities in the EU that are depending on high quality public services. In the public sector procurement can help economies to be more innovative, have more resources and efficiency. (European Commission 2020).

Innovativeness in public procurements shows up in different ways in different stages of the procurement cycle. In the procurement process innovation should be taken into consideration in the procurement preparations. For example, applying innovative ways to specify the object of procurement, invitation to tenders or find new and alternative solutions in procurement process. (Keino 2019).

Innovative public procurement works as a policy instrument for public procurement in Finland. Innovative procurement refers to the new or significantly improved goods and services that can help to enhance productivity, quality, sustainability and effectiveness of public services. Innovative procurement can be a part of a major development, a new solution or an improvement in social services and health care. The objective is that innovation procurement is implemented in every contracting authority. (Ministry of Economic Affairs and Employment of Finland 2020b).

Public procurement offers a big opportunity for innovative products and services. Public procurement helps government boost innovation at national and local level which leads to improving productivity and inclusiveness. The OECD Survey on Strategic Innovation Procurement report presents how public procurement is a major pillar of strategic governance and service delivery. The survey shows that governments are starting to implement a more demand-side driven procurement policies to ensure innovation in the future. The OECD report focuses of the procurement process for innovation related aspects such as risk management, life-cycle cost and e-procurement. (OECD 2020b).

Results from the The OECD Survey on Strategic Innovation Procurement survey showed that improvements of the implementation of professional guidance, exchange of experiences and good practices and the collection of reliable performance data were found. The assessment confirmed the existing complexities and challenges already known of procurement for innovation but that progress to encourage and develop procurement for innovation was used with policies and strategies. (OECD 2020b).

Pulkkinen (2018) reminds that innovation in public procurement is not to be taken lightly. For the Finnish government innovation in public procurement means over 190 million euros worth of opportunities to implement innovation in goods and services. Municipalities percentage from this is 75%. Innovation in public procurement can be challenging because sometimes it means that there isn't a pre-existing solution. This means that suppliers need to offer something new or try to find solutions in their current products or services to make it work. Usually innovation in procurement means that there are suppliers and stakeholders to help plan out the procurement. (Sitra 2018).

Harisalo & Miettinen (2010) points out that usual concerns about innovation in the public services comes because they are not considered innovative enough. Not because innovation can't be considered to be in the public field. (Harisalo & Miettinen 2010,103).

Innovative solutions can be found when collaborating and communicating with suppliers. This can improve efficiency and produce superior products, when procurement and product development drive initiative cohesively. The contracting authority ensures that they're sourcing the most appropriate technology for the procurement, which turns into more efficient and improved customer satisfaction and profitability. Challenges, that these collaborations face are normally technological problems as well as structural problems. This means that if both sides aren't aware of vital processes that the counterpart faces, it prevents the full potential of collaborating. (Rinke 2018).

### 2.3 The principles of public procurement

The four principles for public procurement are equality and non-discrimination treatment of tenders and transparent and efficient tendering. All tenders must be treated equally. For example, if one tenderer is given a possibility to elaborate their offer, other tenderers must be given the same chance and should be purely judged on the basis of the tender they submitted. Equal treatment should be used by the contracting authorities to assess tenders objectively. To ensure equality and non-discrimination, tenders or other procurement documents can't create unfavorable situations. The FCCA supervises that transparency

and non-discrimination principles are implemented in public procurement. (HUS 2020a; Finnish Competition and Consumer Authority 2019).

Non-discrimination is based upon the principle that previously known suppliers can't be favored just because their services or goods are familiar and these previously known suppliers cannot be chosen over potential new suppliers. The procurement process should not be manipulated for the benefit of any supplier. All tenders must be treated equally. Invitation to Tender (ITT) is a formal invitation to generate competing offers from potential suppliers. To ensure non-discrimination the evaluation criteria for ITT must be equally favorable to all eligible and qualified suppliers. (HUS 2020a).

Efficient principle stipulates that the procurement procedure is demanded to be in line with the desired goal. Understanding the right technical specifications, choosing appropriate award criteria and ensuring efficient technical expertise with each procurement. The end result must be in line with the goals, values and requests of the procurement. Ensuring that procurement outcomes meet the needs of customers. The efficiency principle should be present throughout the procurement lifecycle. This efficient principle helps to evaluate existing procurement processes. For example, efficiency can be improved by developing procurement procedures by using framework agreements and dynamic purchasing, when they can be applied to the procurement. (HUS 2020a).

The transparency principle in procurement means that all procurements are published and advertised to ensure genuine competition. Information must be available to all interested and qualified contractors, suppliers and service providers. The published notification should be public, unless there are valid confidential information. Even the smaller under 60 000 € valued procurements that are non-binding for the Public procurement legislation, must obey these four principles. (HUS 2020a).

The Procurement Cycle on the next page explains the key stages to procuring good and services. It can be used as a tool to strategically develop or explain procurement process.

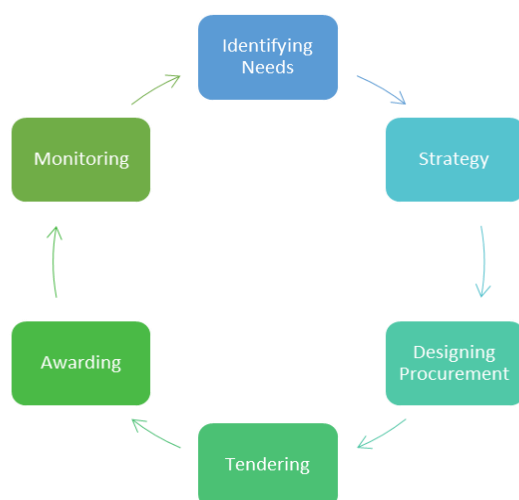


Figure 1. Procurement Cycle.

Figure 1 presents The Cycle of Public Procurement. Every procurement starts by identifying the need for procurement and contemplating the procurement strategy. The Procurement strategy in HUS Logistics has to take also into account other HUS areas hospitals and procurements and always follow economic, social and environmental corporate responsibilities. The third step is planning and preparing procurement, which is mentioned in the cycle as designing procurement. The tendering process include navigating through tendering process, operational challenges and risk management. The procurement is finalized when the award of contract is done. The final step is monitoring delivery, billing and measuring the impact of spending. (European Commission 2019, 10).

## 2.4 Procurement thresholds

Procurement's characteristics determine which procurement procedures should be used. The estimated value of the contract must be calculated before initiating the procurement process. Depending on the value, there are different procurement procedure options that can be used. The three procurement categories are low-value contract, national contract and EU contract. Contract values for both EU and national thresholds are listed in pages 10-11 in Table 2 and Table 3.

The procurement's value should be the whole compensation value without value-added tax (VAT). With service procurements estimated value is counted for 48 months or open-ended procurement contract. With supplies and equipment's, the estimated value is counted from the last 12 months or last calculated budget period. Sometimes only the estimated value is known but it should still calculate on the basis of best information available. Estimating procurements can be done with the help of market research. (HUS 2020c).

If supplies or equipment are needed constantly, it can indicate that there is a bigger need for similar procurements. Inquiring and researching if there are similar needs at hospitals helps to optimize and maintain an effective organization. (HUS 2020a).

Procedures valued under 60 000 € or low-value contracts are non-binding for the Public procurement legislation. These smaller procurements still need to follow up public procurement principles; equality and non-discriminative treatment of tenders. And transparent and efficient tendering. Low-value contracts are expected to follow organization's procurement rules and procedures and document the procurement process. (Business Finland 2020). In HUS every procurement that is valued to be over 10 000 €, a procurement decision document is produced in electronic database at ASKO. The decision in low-value contracts has to clearly state that the procurement is under the national threshold. (HUS 2020b).

There are two thresholds in procurement: national and EU threshold. Any procurement that is over the national threshold must be published to the free electronic forum HILMA. New threshold value 60 000 €, was determined in the beginning of January 2020 and also 150 000 € value for Public works contracts. A contract notice must be published on contracts that exceed national and EU thresholds. Contract notices are found on HILMA website, which is maintained by Ministry of Economic Affairs and Employment. Breaching the obligation to advertise procurements constitutes a substantial procedural defect that can result in annulment of the awarded contract by the Market Court. (Ministry of Economic Affairs and Employment of Finland 2020a; Fondia 2020)

Contract type	Threshold (euro)
Supply and service contracts	60 000
Concessions / services	500 000
Health care and social services contracts	400 000
Public works contracts	150 000
Concessions	500 000
Design contests	60 000
Other special service contracts	300 000

Table 2. National thresholds for Contract types (based on Ministry of Economic Affairs and Employment of Finland 2020a).

Table 2 shows National threshold values for different contract types. The lowest contract type value is 60 000 € for Supply and service contracts and Design contests. Highest contract type values for national thresholds are Concessions and services contract type that value over 500 000 €.

When the value exceeds to EU threshold value, a public contract notice must be published in the HILMA portal according to EU rules. Contracts that exceeds the EU threshold can be put out to tender in the form of open, restricted or negotiated procedure, competitive dialogue, direct contract award, framework contract, dynamic procurement system (DPS), electronic catalogue or design contest. (Ministry of Economic Affairs and Employment of Finland 2020a; Business Finland 2020).

Contract type	Thresholds (euros)	
	Central government authority	Other contracting authorities
Supply and service contracts	139 000	214 000
Public works contracts	5 350 000	5 350 000
Design contests	139 000	214 000

Table 3. EU Thresholds for Contract types (based on Ministry of Economic Affairs and Employment of Finland 2020a).

Table 3 has EU Thresholds for three different contract type. Threshold values are divided to represent Central government authority and Other contracting authorities. Lowest threshold value is for Central government authority for Supply and service contracts and Design contest for 139 000 € and Other contracting authorities for Supply and service contracts and Design contest for 214 000 €. (Ministry of Economic Affairs and Employment of Finland 2020a).

## 2.5 Public Procurement Legislation

The Act on Public Procurement contracts and concession contracts 1397/2016 dictates meanings, principles and definitions regarding all matters to public procurement. Procurement's regulation enhances efficiency in the use of public funds and creates innovative and sustainable public procurement. The Act ensures that competitive tenders offer equal opportunities and competitiveness to provide goods, services and public work contracts in

transparent and efficient tendering. (Laki julkisista hankinnoista ja käyttöoikeussopimuksista 1397/2016).

Public procurement procedures must be carried out following with national procurement legislation and the procurement directives of the European Union. The Ministry of Economic Affairs and Employment handles the preparation of legislation concerning public procurement. (Ministry of Economic Affairs and Employment of Finland 2020c). And the FCCA supervises public procurement legislation. (Finnish Competition and Consumer Authority 2019).

The Act on Public Contracts states that contracting authorities are obligated to advertise their contracts to ensure conditions of competition for suppliers. Advertising public contracts is made by publishing a notice in HILMA, a free electronic forum maintained by the Ministry of Economic Affairs and Employment. Neglecting to advertise public contracts is considered a procedural error and can lead to the cancellation of the award decision issued by the Market Court. (Ministry of Economic Affairs and Employment of Finland 2020c).



### 3 COMPETITIVE TENDERING

Competitive tendering is a process in which a contracting authority invites goods and service suppliers to compete with one another with submitting priced tenders for goods and services. (Ministry of Economic Affairs and Employment of Finland 2020b.)

Every procurement of HUS must always use competitive tendering despite the value of procurement or means of finance. Determined by procurement legislation, competitive tendering is organized if the buyer is a contracting authority and the procurement value is over the national threshold. When procurement's value is under the national threshold competitive tendering isn't binding for the Public procurement legislation but procurement entities still need to follow up public procurement principles; equality and non-discriminative treatment of tenders and transparent and efficient tendering.

If consultant companies are used in competitive tendering, consultants are required to follow the same rules and guidelines as the contracting authority. (HUS 2020b).

#### 3.1 Preparing and planning competitive tendering

Starting a competitive tendering requires time and effort and doing the necessary background work. Understanding procurement's limits and possibilities before starting. Innovative procurement comes from sustainable way of thinking. Things like environmental, social and economic responsibility are all part of it. Figure 2 demonstrates the tendering process and key steps that competitive tendering needs to follow.

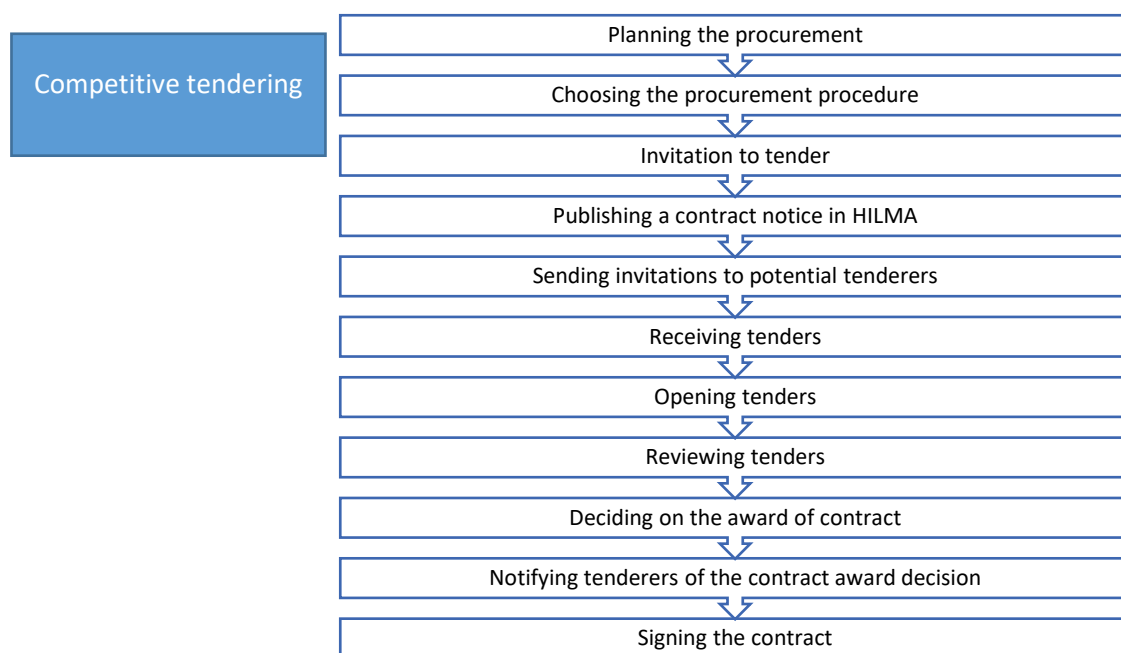


Figure 2. Stages of competitive tendering (based on Business Finland 2020).

Part of preparing and planning procurements means that requirements must be set beforehand and those requirements must be met in the execution of the procurement. In the preparing stages options and risks must be thought out. For example, doing a market survey can help to determine possible suppliers, equipment, pricing, critical products and maintenance options.

HUS consist of five hospital areas: Helsinki University Hospital, Hyvinkää, Lohja, Porvoo and Västra Nyland so it is vital that the hospitals can provide the same level of treatment anywhere and in any situation. (HUS 2020a).

Having reliable suppliers and equipment is key to ensure quality hospital care. An example of this happened early this year. On the 11th of March 2020 World Health Organization announced a worldwide pandemic due to Coronavirus disease (COVID-19). The strain of increased hospital care and needing more respirators, gloves, disinfectant, masks and other needed equipment lead to a brief shortage worldwide and delayed delivery times. Logistic measures were made to ensure hospitals got the necessities first. This event that no one saw coming forced many world leaders and head of hospitals to make quick decisions worldwide. Thankfully, the need for supplies and necessities has steadied and more preventive measurements have been done since.

In some procurements part of preparing and planning for procurement is doing an HTA. HTA stands for Health Technology Assessment and it refers to the evaluation of impacts, effects and properties of health technology. Health technology is considered in the application of skills and organized knowledge when it comes to medicines, vaccines, medical devices, systems and procedures and equipment that help solve health problems and improve quality of life. The main purpose to do a HTA is to inform a policy decision making and process information in different aspects such as social, economic, organizational and ethical issues of health technology (World Health Organization 2020).

All procurements need market research to help determine the overall situation and what the market is offering. Even procuring previously used and known products it is still beneficial to do market research, and in these cases when the product is known it becomes much easier to find information. These researches and surveys inform contracting authorities for possible suppliers, product range and solutions that are being offered. These researches should point out multiple suppliers and possible distinction in technical requirements and give an overall picture of the product range. Pricing is also researched to figure out suitable price range for the procurement. Sometimes in the competitive tendering process necessary information concerning the procurement may come up later on, and in these cases contracting authorities can ask for additional information when publishing

their invitation to tenders. This ensures equal and non-discrimination actions on the procurement process. (HUS 2020c).

Part of preparation and planning for municipalities and hospitals is needing to categorize their procurements into order of importance. The goal is focusing to ensure HUS hospital care as well as the financial aspect. Money for the HUS procurements come from government funding.

To help understand the order of importance, procurements can be categorized into four categories: routine, leverage, bottleneck and strategic procurements. This is also called the Kraljic Matrix. Routine procurements financial value is not very substantial. For this category, it is common that the products and services are standardized and found from different suppliers. For example: daily consumer goods, cleaning and logistic services. In the leverage category, procurements have large quantitative of consumption and acquisition. Products considered to be leverage procurements are standardized and there are multiple suppliers. Main goal for this category is to optimize quantitative, quality and level of service. But also, to ensure reliability of delivery, maintaining lower cost and optimizing logistical processes. Examples from this category are disposable medical gloves, ostomy care products and blood glucose test strips. Bottleneck procurements mean products that are acquired seldom and there are only few suppliers. For example, cardiac assist device, instruments for perfusion and medical gases. These products are vital for hospital care and availability must be ensured. Strategic procurements are from financial point of view the most meaningful but also part of developing HUS operations. Strategic goals, resources and responsibilities are defined in the early stages and usually a team of experts is formed to achieve successful end result. Examples from strategic procurements are medical services and IT-systems that are needed in hospital care. (HUS 2020c).

### 3.2 Procurement procedures

With public procurement, the standard way of awarding contracts is through competitive tendering. Choosing the right method depends on nature of the goods, services or work, value of the procurement, availability and capacity. Also, delivery date and transparency of procedures are things that need to be considered. There are seven method that can be used and three additional tendering techniques, when it comes to public procurement. Open procedure, restricted procedure, competitive negotiated procedure, competitive dialog, innovation partnership and design contest are the types of public tendering procedures associated with public procurement. Exception in tendering is the direct contracting method, that can be carried out directly without using competitive tendering. Additional techniques such as framework agreement, dynamic purchasing system and electronic

auction can be used if the circumstances allow it. (Your Europe European Union 2020; Business Finland 2020).

All public procurement procedures implement the advice and guidance on public procurement and public procurement legislation. All tendering must be carried out with the public procurement process for fair and equal treatment of tenderers in all stages of the procurement. (Business Finland 2020).

In public procurement all contracts must put out the invitation to tender. The only exception to this is awarding contracts directly, without using competitive tendering. In this case, reasons for awarding contracts directly must always be given in the contract award decision and justifications must be found in the section 40 of the Act on Public Contracts. For example, procurement legislations states that if there are strong arguments, like having only one supplier, direct contracting can be carried out. All the arguments for this procurement method are stated in public procurement legislation. (Business Finland 2020).

A written decision on the outcome of the tendering process is made by the contracting authority. The decision is signed before the contract is made. The contract award decision is forwarded to all participants of the competition with instructions for challenging the decision and appealing it to the Market Court. (Business Finland 2020).

Open Tendering is the preferred procedure for contracting authorities to use. Open Tendering means that the tender is open to local and foreign companies that fulfill tender's requirements.

Restrictive Tendering procedure means that the tender is open for invited or selected suppliers chosen by the contracting authority. It means that there are specific number of contractors, supplier or purchasers that are invited to tender. Criteria for the selected suppliers can be relevant experience, financial resources, capabilities and manufacturing facilities, required licensing and occupational registration.

In competitive negotiated procedure suppliers can ask to participate but only pre-selected supplier's, contractors and purchasers are invited to submit tenders and negotiate. This procedure can be used in negotiations of specific and complicated procurement. In competitive dialog is used when the aim is proposing a method of addressing a need defined by the contracting authority.

Innovation partnership is used when there is a need for purchasing goods or services that aren't available on the market. In this partnership, working together with suppliers is important. In design contest this procedure is used to get an idea for a design.

In recurring procurements framework agreement technique can be used. If restricted procedure is being used a dynamic purchasing system (DPS) is preferred for recurring purchases. Lastly a tendering technique called electronic auction is used, when deciding the winner in small standardized purchases. (Your Europe European Union 2020).

### 3.3 Stages of tendering

#### **Invitation to tender**

After procurement is prepared and planned, invitation to tender is the next initial step in competitive tendering. It is a formal invitation to generate competing offers. The tender document has criteria that helps contracting authority to figure out supplier's stability, previous experience, trading history, core competence, capability, quality standards, pricing and delivery process.

Invitation to tender evaluation criteria may often differ depending on procurement goals and needs. Nevertheless, all necessary information about procurement, such as processes, expectations for the tenders, the due date for leaving the tender, how long is the tender valid and where can you leave your tender must be found in the invitation. All invitations must have information on procurement target, quantitative and method how to acquire it. (HUS 2020d).

#### **Publishing notice in HILMA**

After making the invitation to tender it is the contracting authority's obligation to advertise public contract in HILMA. Potential suppliers, contractors and purchasers can see ongoing, prior and future procurement procedures on the website. Notices that are in HILMA are contracts that exceed national and EU thresholds. Procurements that are below national thresholds can also be published in HILMA even if it is not non-binding by the procurement legislation.

HILMA that is maintained by the Ministry of Economy and Employment, sends notices forward to the Supplement to Official Journal of the European Union and TED database. (Ministry of Economic Affairs and Employment of Finland 2020c).

#### **Additional inquires**

If tenders are missing information or they appear to have mistake's, contracting authority can ask supplier for additional information. Requirement for this is to carry it out according to The Act on Public Procurement 3 § legislation to follow non-discriminating and ensuring

equal treatment among all given tenders. (Laki julkisista hankinnoista ja käyttöoikeussopimuksista 1397/2016).

### **Receiving tenders**

When giving a tender, it must qualify all given requirements from invitation to tender and other given procurement documents. All tenders must be evaluated, checked and compared to see if given terms, requirements and criteria are fulfilled. Contracting authority can disqualify tenders that do not fulfill given requirements. A tender can also be disqualified if it has come late. The chosen tender must be picked from received tenders and one that qualifies to all given requirements listed in the invitation to tender and shows suitability. (HUS 2020d).

### **Deciding on the award of contract**

Procurement decision is a written formal document that tells all the participants the reasoning why one of them has been chosen. Any disqualifications must be clarified in the decision and how comparisons between offers were made. All procurements over 10 000 € a formal procurement decision is produced and it can be found in ASKO. (HUS 2020d).

### **Notifying tenderers of the contract award decision**

Contract award decision is informed electronically via email with necessary attachments to tenderers. Contract award decisions must always include instructions to appeal and challenge the decision. Waiting time is used for procurements that are over the EU-threshold. This means that the procurement entity can make the contract when the waiting time of 14 days is over. Waiting time starts when procurement decision is made and informed to all named parties / tenderers. During these 14 days, it is considered that the decision has reached all parties and possibility to appeal is made possible. Procurements over the EU-threshold that follow framework contract arrangement and DPS procurements (Dynamic Purchasing System) waiting time is shorter, 10 days. (HUS 2020d).

### **Contract period**

Contract is drawn up when procurement decision is lawful. After 14 days waiting time award contract can be made. Contact person is named for every contract award decision. This person is responsible for informing and monitoring the necessary steps regarding to maintaining contract information. Lawful contract states all necessary information such as when the contract starts, how long contract period is and how contract period is determined to be. (HUS 2020d).

## 4 PROCUREMENT COMPETENCE

Procurement competence is considered to be essential for anyone working in the public procurement field. As public procurement is becoming more complex and skills like negotiation, project and risk management need to be mastered. For any organization to reach its strategic objectives it needs to understand when to utilize procurement competence that is found inside the organization and when procurement competence is needed from outsourced resources. (OECD 2020c; KEINO 2018).

KEINO-website, that stands for Competence center for Sustainable and Innovative public procurement in Finland, is an implementation of the Finnish Government Program and it helps and supports with sustainable and innovative procurement. In the website procurement competence is listed and defined into five different areas: substance competence, budget and pricing expertise, operational procurement competence, expertise in procurement legislation and communication skills that procurement professionals should have. (KEINO 2018).

HUS Logistics started using consultant companies in the end of 2019 to divide their time better and relief their workload. Consultants that have competence in specific substance can help contracting authorities to reach their goal in a more innovative way and help think of solutions from different aspects. Consultants are expected to bring the same level of competence that HUS Logistics has in-house and manage their competitive tendering. Balancing the need for both in-house and outsourced resources can result to a capable and expertise combination of the two coexisting. (HUS 2020c).

### 4.1 Characteristics of procurement competence

Procurement competence can be seen in the support and success of each procurement cycle, where goods and services are delivered in a timely and efficient manner and implementation of corporate responsibilities in environmental, economic and social challenges. (OECD 2017, 174).

HUS values and strategy promises to provide better care for patients every day and their vision is to solve challenges encountered in health care and act as a pioneer. These values and vision are embedded in procurement of HUS Logistics. (HUS 2020a.)

Ekholm (2019) reminds that procurement competence needs to be part of organizational leadership and strategy for it to reach its goals. The article lists 19 competences that the Commission has identified belonging to procurement. Knowledge in areas like procurement cycle, legislation, responsibility, market research, eNotices and other electronical

tools, evaluation criteria, negotiation skills, managing contracts. But also, other important skills like flexibility, managing projects and risks, mastering communication skills and co-operating with different partners. (Ekholm 2019)

So how does an organization choose consultants and what should they be looking for?

Ekholm (2019) observes that an organization should firstly understand the level of capability and the level of competence that the organization has in-house. It is important to understand the current situation, so if needed, changes can be made. The here and now shows where the current standard is and whether future strategy goals need changing. The in-house competence and resources are important for organizational operation and it needs a strong leadership, internal communication and having an open dialog to succeed. (Ekholm 2019).

Klein (2018) lists characteristics like successful performance, that indicates making stable and good decisions in the past. Peer respect and career years are things that can be viewed important but not necessarily tell the whole story. Klein (2018) reminds that credentials tells that the person has a license or certificate of achieving professional standards but it doesn't tell the level of achievements and experiences they have had. Klein names the most valuable characteristic to be the quality of tacit knowledge, that comes from experience and knowledge. He says that people with tacit knowledge can point out things, others can't see before it is pointed out. (Klein 2018).

#### 4.2 Competence of outsourced resources

Using outsourced resources can help organization to divide their time better and reach their strategic objectives. Outsourced resources such as procurement consultant services have specific substance competence that can help contracting authorities have more innovative procurement and have more resources. Substance or substance competence is the core competence that combines the knowledge and skills needed in the occupation. It is knowing the guidelines and rules but also, having expertise and insights that can be used in competitive tendering. (Aarnikoivu 2010, 64-65; Helakorpi 2009).

Organizations are using outsourced resources to make up for shortages when it is needed. Making the decision to use consultants is always up to the organization and the decision should always be in the best interest of the organization. (Marttila 2019.)

For example, in public procurement the legislation allows contracting authorities to use outsourced resources if it adds to the quality of the procurement and ensures equality in



tendering. Contracting authorities can use several consultant companies or several different consultants within a consultant company to outsource tenders. (Mäkelä & Pöykkö 2013.)

### 4.3 Procurement competence nationally

In a public procurement study on administrative capacity the EU Finland Country Profile stated that Finland had 540 contracting authorities in 2013. Today the number has undoubtedly risen. All contracting authorities are connected by the procurement principles and national procurement legislation and the procurement directives of the European Union. (European Union 2013).

Public procurement is becoming more complex and differences between contracting authorities vary. According to a survey done by the Competence center for Sustainable and Innovative public procurement 46% answered that they divide their procurement work tasks with other work tasks and 42% handled procurement work tasks full time. The 12% answered that they didn't handle the procurement rather participated in the procurement process with their expertise or giving guidance. This shows big differences among contracting authorities and their work tasks. The survey also concluded that an overall need for deepening the level of expertise were wished for. (Ministry of Finance 2020).

With the help of The Ministry of Finance a new strategy for public procurement has been published in 9.9.2020 to help bring together contracting authorities nationally and reach strategic goals and more sustainable economy in the future. The strategy has eight objectives and 25 goals to implement the strategy on a national level that they plan to execute in 2020 – 2023. Most of the projects are already underway. With the help of these objectives and goals, the Ministry of Finance hopes to reduce the gap between contracting authorities and unify the overall procurement competence level nationally. (Ministry of Finance 2020).

The Ministry of Finance launched strategy in September 2019 for national public procurement was called "Procurement Finland". The strategy aims to increase ecological, social and economic responsibility in public procurement and focuses on developing strategic management and promoting procurement competence. With the help of the national public procurement strategy all public procurement authorities will have the same tools and guidance for procurement in the future. In the strategy plan public procurement is named to be in the heart of Finland's economy and utilizing public procurement more strategically will enable big achievements in society.

Public procurement units such as Motiva, Hansel Ltd, VTT Technical Research Centre of Finland, The Finnish Environment Institute, Business Finland and the Association of Finnish Local and Regional Authorities that are part of KEINO will be working alongside Ministry of Finance as key partners to increase innovation and sustainable procurements and improve the effectiveness and quality of public procurement and public services. (Ministry of Finance 2020).

## 5 HUS LOGISTICS

### 5.1 Procurement Department

HUS Logistics provides procurement, logistics and medical engineering services for HUS and for the joint authority. HUS Logistics customers are all HUS hospitals and treatment units, HUS member municipalities and the Helsinki University Hospital Specific Catchment Areas that are signed to service agreements. HUS Logistics locates in Vantaa and employs 450 people. Revenue for the organization last year was 275 million euros. (HUS 2020f; HUS Logistiikka 2020d).

HUS Logistics operates under the guidelines and values determined by HUS. The HUS values are caring, pioneership and equality that they govern in their action. HUS Logistics service principle is being a valued partner in procurement, logistics and medical engineering services in the health and social service industry. And their customer promise is being a reliable partner in implementing better care for every patient, every day.

HUS Logistics is one of the biggest public procurement contracting authorities in Finland and it acts as a joint procurement unit for entire HUS. Procurements are executed with the help and guidance of public procurement regulated procurement procedures accordance with national procurement legislation and the procurement directives of the European Union. Procurements follow the policies of HUS procurement strategy, HUS environmental program and procurement appendix.

HUS Logistics procures goods like supplies, equipment and services for their customers. In addition to this the Procurement Department in HUS Logistics makes and maintains procurement contracts and general agreements. The department gives guidance regarding to procurement matters. (HUS 2020a; HUS Logistiikka 2020d).

### 5.2 Procuring in HUS Logistics

HUS Logistics Procurement Department consists of seven procurement categories that categorizes each procurement into suitable categories. The department has Procurement Specialists that handle tendering, Procurement Lawyers that work together with the teams and specialists and a team, that handles tendering for low-value contracts.

These seven procurement categories are presented next page (Figure 5). Each category has a Category Manager and one or several Procurement Specialist working with them. The competitive tendering team has 14 Procurement Specialist and is managed by the Procurement Manager. Procurements valued under 60 000 €, or otherwise known as low-

value contracts is handled by seven Procurement Secretaries and is managed by Service Manager. As the Figure 3 shows, all Managers report to the Procurement Director. (HUS 2020f).

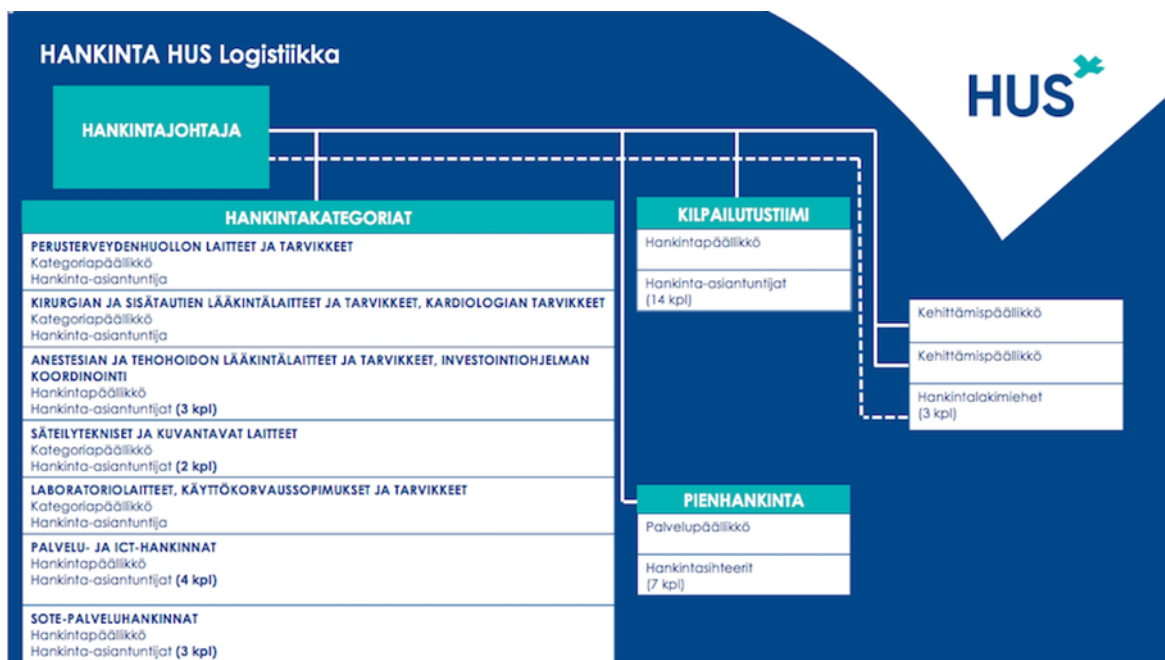


Figure 3. Procurement department's subcategories.

Procurement Categories are divided to seven different categories. This means that every procurement belongs under one of the seven categories. Some of the categories presented above displays all three product areas supplies, equipment and services. Others may focus more on specific product areas like services. (HUS Logistiikka 2020c).

### 5.3 Strategy and leadership

Organization strategy is an expression of how it needs to evolve over time to meet its actions and goals in order to succeed. Strategy is built upon values, goals and priorities that steers the organization towards desired direction. The foundation of every organization strategy are the values that strive the operation. HUS Logistics strategy are the shared values it has with HUS. Caring, pioneership and equality. (HUS 2020a).

Hill's & Jones's (2001) definition of leadership is that it gives the organization a sense of direction and a vision of where it should go. Strategic leadership requires vision, eloquence and consistency, commitment, being informing, willingness to delegate and empower, astute use of power and emotional intelligence. A strong leader demonstrates commitment in their vision and leads by example.

The vision that the organization aims for is the desired place it wants to end up with and how the organization wants to be seen in the future. Strategic planning can be sometimes challenging, because the future is unpredictable. (Hill & Jones 2001)

HUS Logistics vision is to be a valued partner as a provider of procurement, logistics and medical engineering services for health and social services, as well as a pioneer in health care. The aim is to provide reliable and efficient procurement, logistics and medical engineering services, so that it frees up hospitals and treatment unit's resources to concentrate in their core operations.

HUS Logistics customers are all HUS hospitals and treatment units, HUS member municipalities and the Helsinki University Hospital Specific Catchment Areas that are signed to service agreements. In the picture below customers are named and divided into different colors HUS Logistics, Kymsote, Eksote, PHHYKY. (HUS Logistiikka 2020d).

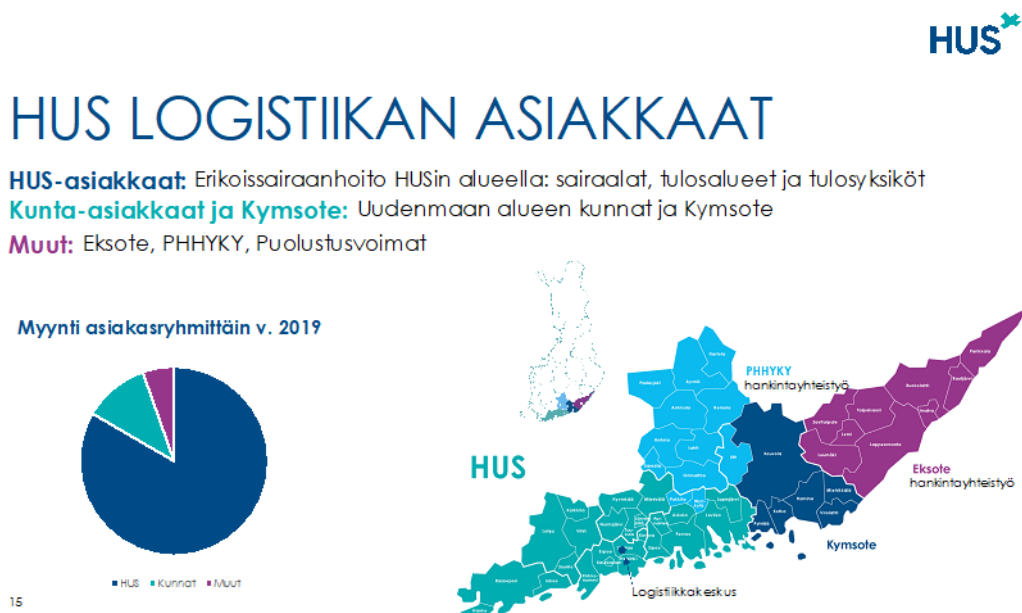


Figure 4. Map of HUS Logistics customers.

HUS Logistics customers are seen above in four different colors. The diagram on the left shows sales from 2019 divided by the customer segments.

#### 5.4 Goals and indicators

Strategic measures are used to follow company's progress in achieving their objectives and goals, customer needs, Municipalities vision and financial possibilities are always on the forefront when it comes to planning and executing operation in HUS Logistics. There

are four areas of responsibilities that HUS Logistics operation consist of: Procurement, Material Control, Logistics and Medical Engineering. Each area of responsibility has a director that supervises the whole operation. The Director of HUS Logistics supervises the whole operation of HUS Logistics. (HUS Logistiikka 2020d).

HUS Logistics Procurement Department has indicators to measure procurement goals and processes. For example, with the help of these indicators, the tendering process can be followed from different aspects.

The tendering process is only part of the procurement cycle but it is one of the areas the strategy indicators measures for valuable information. These indicators measure starting time for procurements, lead time, procurement savings and how the estimated schedule compares to the actualized schedule. With the help of these indicators the tendering process becomes more transparent and differences between categories and procurement procedures can be documented. For example, the data shows that in the beginning of the last quarter 2020 there are over 600 procurement, doubling the amount of procurements HUS Logistics had last year. (HUS Logistiikka 2020, b; HUS Logistiikka 2020d).

The lead time indicator calculates the amount of days that the tendering takes from starting it to when the contract award decision is signed.

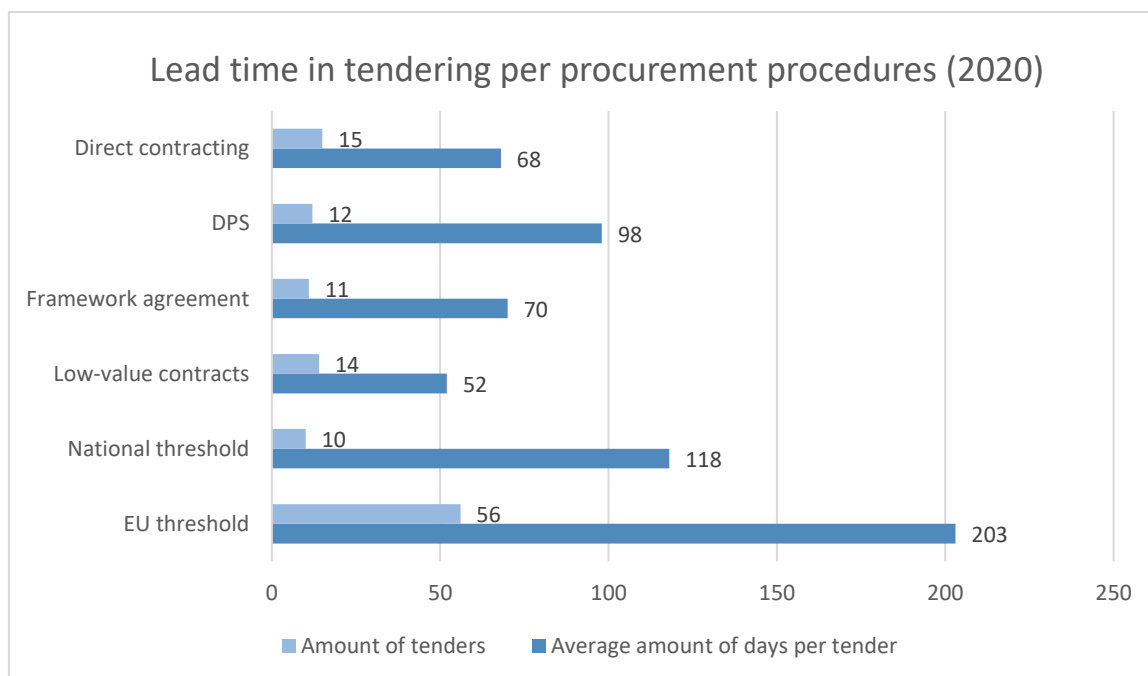


Figure 5. Average amount of days in tendering divided in procurement procedures.

Shown above, in figure 5 a sampling of 107 HUS procurements was divided among threshold values and a few commonly used procurement procedures to see the average lead time for tendering. Purchases above the EU threshold, where the value of contract is

214 000 € or more are shown the most time-consuming. These EU procurements can take up to 6 months (203 days) on average. The low-value contracts and direct contracting duration are lasting 1,5 to 2,5 months on average. (HUS Logistiikka 2020b; HUS Logistiikka 2020d).

Lead time between HUS Logistics own Procurement Categories are shown below. Some of the presented categories have all three product areas supplies, equipment and services and other categories focus on specific product areas like services.

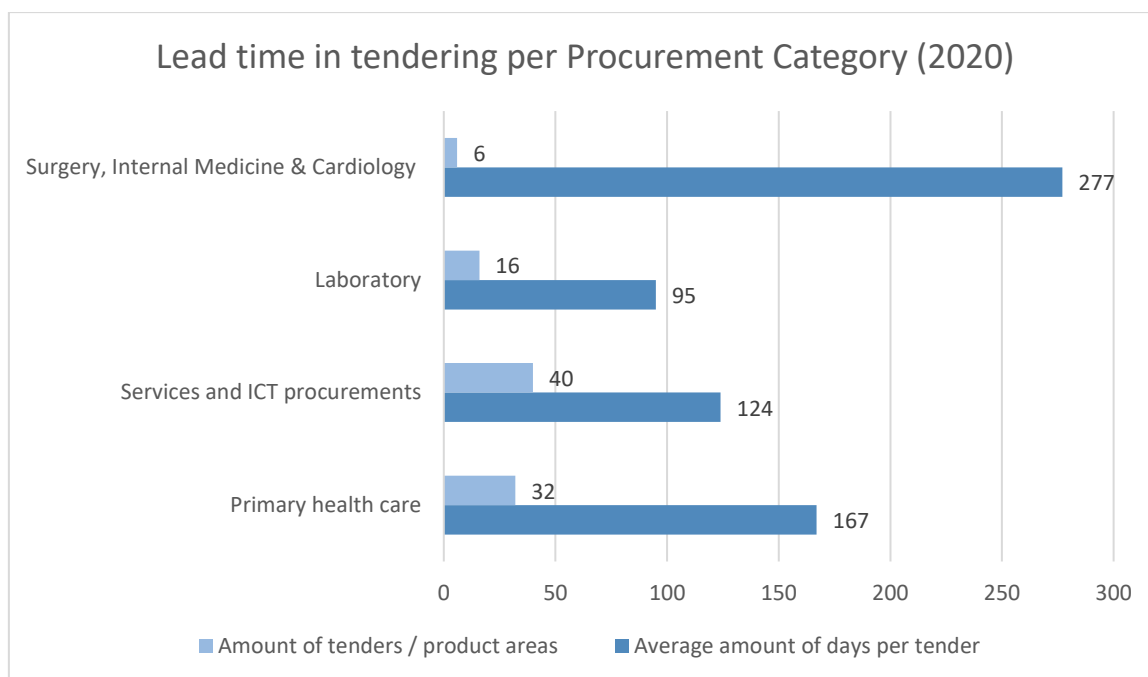


Figure 6. Average lead time among procurement categories.

HUS Logistics has seven procurement categories in total, for figure 6 presented above, four categories were chosen to show different lead times among categories. There are 94 procurements in total in this figure, this sampling was taken from the Procurement Calendar data in the beginning of 2020. Dark blue color shows average amount of days per tender and light blue shows tender amount or product areas a category has. Higher amount of average lead time days may indicate different things. For example, procurement procedure, value of procurement or how complicated and comprehensive procurement can prolong the procurement process and lead time duration. (HUS Logistiikka 2020b; HUS Logistiikka 2020d).

In the beginning of the last quarter of 2020, HUS Logistics had over 600 procurements. Indicators that recorded the week 38 data showed that 98% of procurements were updated to HUS Logistics calendar of Competitive Tendering within 1 month of recognizing

the need to use competitive tendering. Second indicator from week 38 showed 81% actualized procurements that followed the estimated schedule given in the beginning. This indicator tells that the estimate of the schedule can be predicted quite closely to the actualized schedule. (HUS Logistiikka 2020b; HUS Logistiikka 2020d).

## 5.5 Extra resources

As the figures 5 & 6 showed, competitive tendering can take time and additional resources are sometimes needed. The use of consultant services can offer contracting authorities a way to divide their time better and give a relief from their workload. Consultants that have competence in specific substance can help contracting authorities to reach their goal in a more innovative way and help think of solutions from different aspects. The use of consultant services has increased more and more recently and multiple companies rely on these outsourced services for projects and specific substance competence when needed. (Marttila 2019).

At the end of 2019 HUS Logistics found out by the FCCA that several dozen product groups without competitive tendering. The decision to use consultant services to help with competitive tendering was made and several consultant companies were selected. (STT 2019; HUS Logistics 2020c).

Procurement legislation allows contracting authorities to use outsourced experts and consultants when it adds to the quality of the procurement and ensures equality in tendering. Outsourced experts and consultants that contracting authorities rely on are usually well-known companies in the procurement field. With outsourced competitive tendering, contracting authorities can use several consultant companies or several different consultants within a consultant company. (Mäkelä & Pökkylä 2013).

Responsibility of the competitive tender is always with the contracting authority, even if it decides to outsource competitive tenders to consultants. Contracting authority's role is to ensure and supervise that all stages of the competitive tendering is done by following the principles of public procurement and guidelines of procurement legislation. From the procurement stand point, the roles that a contracting authority and a consultant company represent are quite different. A consultant company's goal is to execute an assignment for the benefit and results of the consultant company. A contracting authority aims to better social welfare by providing effective goods and services. Contracting authority and consultant company sign a contract to agree on the terms, roles and responsibilities of the procurements. Roles and responsibilities of the parties are explained by the contract and compensation for the assignment is agreed upon. (Mäkelä & Pökkylä 2013).



A successful procurement can be determined if the competitive tender is comprehensive and the tender process is sensible and caters to the procurement. Competitive tendering should always represent professional and comprehensive procurement competence and follow the values of public procurement, equality and non-discrimination treatment of tenders and transparent and efficient tendering. Finding the right procurement procedure to enable efficient and successful procurement comes from understanding the procurement characteristics. (HUS 2020c; European Commission 2020).

Companies benefit from consultant services when outside perspective and competence in specific substance are needed. Consultant services are expected to provide a level of efficient and expertized service to contracting authorities. There are typically two reasons why companies depend on consultants. One, the resources inside the company are not adequate. Or two, there isn't enough substance competence inside the company to execute the procurement. (Marttila 2019; Hill & Jones 2001, 22).

To understand the background, current status and future plans for using consultant services in HUS Logistics, the Procurement Director Martelius was interviewed to comprehend the reasons behind using consultants in competitive tendering.

*One of the most important themes for HUS is responsibility and that procurements are done by following guidelines and regulations of HUS and the procurement legislation. When the amount of competitive tenders was so overwhelming, it was simply impossible to do it without consultants. Being innovative is part of the vision at HUS Logistics, so with the help of consultants we can achieve that vision of innovative procurements with some of our outsourced procurements. (Martelius 2020).*

HUS Logistics has always relied on using its own resources when it comes to competitive tendering. The decision to outsource tenders was made in the end of 2019.

*The decision to use consultant services was made end of last year in 2019 because we had a lot of product groups that were without competitive tendering and our own resources weren't sufficient and we needed to fix the situation. HUS did competitive tendering to find consultants that are now helping us with our competitive tenders. We really haven't used consultants for specific substance competence. Or there has been a few challenging procurements that we needed help substance-wise and we didn't have that specific competence in hand so we used consultants. (Martelius 2020).*

Working closely together with the consultant companies, HUS Logistics Procurement Department can learn new things from these partnerships. Reuer (2009) calls this a learning alliance. Learning alliance is a network or an organization that wants to improve knowledge on a specific topic. These alliances are usually formed in the network of public and civil society to further change and learning. Private benefits that companies can learn from one another can be picked up and applied to organizations own operations. Learning alliances have shown pairs of companies learning over time to manage their collaborative

activities more efficiently and contracts between firms that have prior contractual relationships appear systematically different than newly formed pairings. (Reuer 2009)

The use of consultant services has enabled HUS Logistics to learn new things and possibly implement those things in their current procurement processes in the future.

*We had a big supplies procurement that had hundreds of supplies within the procurement and we used a consultant company to do the competitive tendering. They provided Procurement Specialists to do that and we had a successful competitive tender ready quite quickly and with good quality. It made us think if we should also use that approach in the future. (Martelius 2020).*

HUS Logistics has used consultant expertise from several consultant companies such as PTC Services Oy, Sansia Oy, Valor Partners Oy, Hansel Oy, Tmi Mons Vermis, Silver Planet Oy and KPMG Oy Ab. According to HUS Logistics records 92 competitive tenders were outsourced to these consultant companies during 2019 – 2020. (HUS Logistiikka 2020a).

These selected consultant companies are experts in the field of public procurement. The selected consultant companies vary from small to big in size but all serve a purpose to different procurement themes that HUS has. (HUS Logistics 2020a; Martelius 2020).

*We have themes for procurements and for different themes different consultants are used. Themes like service procurements, supplies and equipment and innovative procurement are done to help us. (Martelius 2020).*

Outsourcing competitive tenders can be quite challenging at times because a contracting authority loses a certain amount of visibility when they use consultants. Reporting and following the progress of the competitive tendering process is important because of the limited visibility and it is up to the Category Managers and consultants to keep in touch during the competitive tendering process. These follow-ups show how the competitive tendering is actualizing and seeing how the schedule is being met. (HUS Logistiikka 2020c)

The outsourced competitive tenders have belonged to all three product areas and different procurement procedures. The overall quality of the outsourced competitive tendering has been good and no difference between outsourced competitive tenders have emergence. (HUS Logistiikka 2020a; HUS Logistiikka 2020c)

*All in all, the level of quality of consultant service work has been good. Sometimes the quality varies. Competitive tendering is usually done by one consultant per competitive tender. (Martelius 2020).*

## 5.6 Benefits of consultants

The use of consultant services has increased more and more recently and multiple companies rely on these outsourced services for large projects to provide extra set of hands,

meeting critical deadlines and give additional support. Using consultants to do competitive tendering can help organization to dedicate their time to other ongoing projects and feel comfortable that procurements are meeting their deadlines. Outsourcing tendering can help to maintain a steady workload, alleviate the pressure and diminish the risk of delaying deadlines. (Marttila 2019; HUS Logistiikka 2020c).

HUS guidelines state that procurements can be outsourced if the contracting authority won't be able to do competitive tendering in the time that the procurement legislation requires and the procurement content is suitable to be outsourced. Also, procurements that are considered demanding or when special substance competence is needed and it can't be found in-house.

To agree on outsourcing a competitive tender, a commission agreement between HUS and the consultant company is made. The signed agreement delegates work tasks in different competitive tendering stages. In the commission agreement procurement stages are divided between HUS and consultant company can be seen in (Appendix 6).

Responsibility of outsourced competitive tenders are with the Category Manager. Category Manager estimates together with Procurement Manager if a procurement can be done in-house or if it should be outsourced. Procurement Manager and Procurement Director are responsible for the contract and finding the necessary resources to the Category Manager. The goal is to centralize similar competitive tenders to the same consultants if possible, to help standardize procurement category working. (HUS Logistiikka 2020c)

## 5.7 Process description for using consultants

HUS Logistics use of consultant services follows the process description that is specified in the directives of HUS Logistics. (HUS Logistiikka 2020c)

To determine an estimate for competitive tendering that is used for the commission agreement as a timeline for the consultant. The Procurement Manager for the competitive tendering team calculates an estimate amount of work based on the given information regarding the competitive tender and then the estimated amount is categorized into procurement stages and prices are rated accordingly.

Start of the partnership between the Category Manager and the consultant, an opening meeting is arranged by the Category Manager. The participators of these meetings are usually the Category Manager, HUS Logistics Procurement Specialist and the consultant. The Consultant is given all necessary material and information of the competitive tender

and an estimated schedule. In the meetings delegated work tasks and follow-up meetings are agreed upon. (HUS Logistiikka 2020c)

Consultants are also required to plan-out a schedule for the competitive tender and report to Category Managers. Other work tasks include doing market research, making suggestions to the competitive tendering and contacting expert's panel. The expert's panel is in charge of the information in specification form that is given in the planning and preparation stages. These experts input helps consultants to understand procurements better, usually these experts are doctors or nurses that have years of experience in the health care field and using hospital equipment and goods. Consultant reports progress to the Category Manager and overall monitoring of the competitive tendering status is done with co-operation of the Procurement Manager.

In the competitive tendering process, the consultant writes the invitation to tender document and draft for the award of contract, then sends it to the Category Manager for inspection. After that, the document is sent to the HUS juridical inspection and if approved, consultant can finish the invitation to tender based by the given comments and approval and publish it in HILMA. If suppliers have comments or questions, consultants can coordinate them to expert's panel and Category Manager. Category Manager answers the questions through Cludia-system. The Cludia-system is used to plan, keep track and manage all stages of the competitive tender. After this, the consultant makes a preliminary examination to the received tenders. Consultant then sends the tenders to the expert's panel to be evaluated and to preform possible test runs. Consultant assembles arguments and test run results for the official contract award decision document. (HUS Logistiikka 2020c).

After this the documents are sent to the Category Manager to process them and send it to the HUS juridical inspection. The document content is checked and contract award decision is saved to Asko. Director of HUS Logistics or other named director signs the document and the award contract decision is sent to tenderers in Cludia-system.

Consultant assembles all necessary documents for the contract to be signed by the named parties. Category Manager handles the execution and sends all documents to the record office. Consultant assembles the handover-material, makes the notice in HILMA that informs that a contract is made. After this consultant delivers all material regarding the competitive tender to the Category Manager and feedback is given. (HUS Logistiikka 2020c)

## 5.8 Cost of consultants

HUS Logistics and the Consultant companies have agreed that invoicing is done one competitive tendering per invoice. Category Manager checks the invoice and Procurement Director approves the invoice. Invoices are recorded and monitored.

Using consultant services can be expensive as the cost for outsourced tendering comes from consultants invoicing their work hourly. HUS Logistics has a budget for using consultant services, but estimating how much consultant services are needed has proven to be difficult. (HUS Logistiikka 2020c; Martelius 2020).

The need for outsourcing is seen as a valuable resource in the future but estimating how much consultant services in the future are needed is impossible to predict.

*There is a budget for outsourced competitive tenders but it is hard to predict in advance how much we need to use consultants. It will be challenging in the future to predict the need for consultants as well.*

## 5.9 Valuable partnerships

Organization gains an additional resource when they outsource their competitive tenders to capable consultants. Understanding when to rely on consultant services and when to capitalize organization's own staff is important. (Ekholm 2019; European Commission 2019).

In HUS Logistics the decision to outsource comes from The Procurement Manager estimate of in-house resources and a discussion with the Category Manager. Reasons for outsourcing can vary from needing the expertise and substance competence or not having enough resources in HUS Logistics in hand. Competitive tenders may also suddenly appear, demanding immediate attention. (HUS Logistiikka 2020c).

Effecting what procurements are being outsourced is always determined on a case-by-case level. Seeing what procurements are planned and what appear suddenly can change the order of importance in competitive tendering. When a procurement need is identified, planning a strategy and designing competitive tendering are things that need time. Still, every public procurement follows the rules and guidance of procurement legislation and timelines that it details (European Commission 2020; HUS Logistiikka 2020c).

Choosing to use consultant services or deciding to do all the procurements in-house is up to the contracting authority but equality in tendering must always be ensured. (Siira 2017; Pulkkinen 2018).

Key elements that a functioning partnership between Category Manager and a consultant needs from one another is open communication, shared vision, roles and limitations. Category Manager and consultant depend on one another and work closely during the competitive tendering process. Category Manager is responsible for the competitive tender and trusts the capabilities of the consultant to handle competitive tendering. (HUS Logistiikka 2020c).

*I see the need for consultants in the future. How much we need them is hard to predict. But for example, innovative procurements need trusty consultants in the future. (Martelius 2020).*

During these partnerships that form between the Category Manager and the consultant, goals and needs for the competitive tender must be discussed as they work as guidelines that can be revisited during the competitive tendering process. Establishing those goals and needs early on, helps the partnership between the Category Manager and the consultant see if they are on the same page. (Siira 2017).

Trusting the partnership between the Category manager and the consultant is something that comes with time and seeing the results that the partnership has generated. In the outsourcing process trusting is seeing someone's ability to handle things that both of you have agreed on. In the outsourcing process after the Category Manager's briefing consultants have been given the responsibility and authority to do the competitive tendering, handle their part of the work tasks and present the outcome of their work.

Partnerships between Category Managers and consultants need communication and feedback to work. The flow of information and interaction can be established with regular meetings and choosing the right channels of communication, so that everybody involved is informed and is given updates of the competitive tendering process. When the consultant is been given the competitive tender, it is important to make sure that all information is given and understood by the consultant. During the competitive tendering process check-ups are vital as they provide a better understanding of the schedule and how the process is going. (HUS Logistiikka 2020c; Martelius 2020).

Constructive criticism and feedback help build partnerships into stronger ones. Even harder things must be dealt with and fast, so that they don't grow into problems. Interaction between partners should be open and done often.

*Constructive criticism has been given to the consultants and consultants have also given us constructive criticism. We've given them feedback on delayed schedules and why those aren't immediately notified. We've received feedback from consultant on our expert's panels and substance competence that may not always be the most informative for the consultants. (Martelius 2020).*

## 6 EMPIRICAL RESEARCH

Empirical research is a type of research method that relies on the answers obtained from collecting the data. Empirical research can be executed both qualitative or quantitative but the method should be selected by considering the nature of the data or sampling.

Research questions guide the research process and are built around the core of the research. These questions determine the specific objectives and aims for the research. (Kananen 2015; Jyväskylän yliopisto 2020).

The case research company for this thesis is HUS Logistics. HUS Logistics acts as a joint procurement unit for HUS area and offers logistic services and medical engineering services for the joint authority. HUS Logistics is one of the biggest contracting authorities in Finland procuring goods and services to its customers.

HUS Logistics started using procurement consultants to help with procurements in the end of 2019 after several product groups were found without competitive tendering and in-house resources weren't sufficient. HUS Logistics used consultant companies to outsource 92 goods and service procurements. The empirical research method is used to analyze the sampling of the 92 outsourced competitive tenders to see if there are similarities or patterns that could help determine when to use outsourced consultants and what makes an outsourced procurement a success. (HUS Logistiikka 2020c).

The data and sampling material for the interview questions formed with the help of procurement literature, HUS Logistics documents, Procurement Calendar from the last quarter of 2019 until beginning of last quarter 24.10.2020 and Calendar of Competitive Tendering. (HUS Logistiikka 2020b).

### 6.1 Choosing the research method

Research method is a strategy that helps to find answers to research questions. The use of consultant companies in HUS Logistics started in the end of 2019. No previous researches have been done to analyzing these competitive tenders. To find answers to the research questions, research data and sampling was collected from the Procurement Calendar from the last quarter of 2019 until beginning of last quarter 24.10.2020.

With the help of the already existing data, the groundwork was formed. The Procurement Calendar provided the material to analyze and form the questions to the interviewees. The Procurement Calendar had data and numbers for outsourcing but not the reasons and the processes behind it. An empirical research method was chosen as it fits the best for the purpose of this thesis. (HUS Logistiikka 2020a; HUS Logistiikka 2020c).

Between quantitative and qualitative analysis, the quantitative analysis uses numbers and statistics to understand averages, correlations and cause and effect relationships. The qualitative analysis tends to be more flexible and reflect to the choices and assumptions of the researcher. Knowing that the interview method would find answers to the research questions rather than numerical correlations, the qualitative method was chosen. In interviews qualitative method can be more time-consuming but it collects much richer information and extensive responses. (Kananen 2015; Jyväskylän yliopisto 2020).

A sampling in research means a selected part of something in which the data is collected for the research. The sampling for this research is the 92 outsourced competitive tenders from 2019 to 2020, that the four Category Managers outsourced. For this research those four Category Managers are interviewed to be able to answer the research questions in this thesis. (Jyväskylän yliopisto 2020; HUS Logistiikka 2020a; HUS Logistiikka 2020c).

## 6.2 Semi-structured interviews

Semi-structured in-depth interviews are commonly used in qualitative research because it provides a dialog between researcher and participant. In semi-structured interviews the method allows the researcher to collect open-ended data and ask follow-up questions and comments. (Jyväskylän yliopisto 2020).

This research focuses on analyzing and studying HUS Logistics newly adapted use of outsourced consultant services and its 92 outsourced competitive tenders from late 2019 until 24.10.2020. The research question aims to find out if similarities or patterns can be found to determine when outsourced procurement consultants should be used and what makes a successful outsourced procurement.

This research relies on qualitative research methods. The information and data was collected from several documents, procurement calendar, charts and a semi-structured interview with Procurement Director and four Category Managers that have used outsourced consultants. The interviews are used as a primary source for this research and the data from Competitive Calendar acts as a secondary source providing information from the outsourced competitive tenders.

The semi-structured interview method was chosen for its technique to capture accurate and in-depth insights from focus groups. These interviews can be divided into two data collection instruments: The interview for Procurement Director that consist of 12 open-ended questions (Appendix 1) is introduced in chapter 5 to help understand the background, current status and future plans for using procurement consultant companies. And also, to understand what HUS Logistics has learned during this process. The second data



collection instrument came from 4 Category Managers that have experience in outsourcing procurements to consultant companies. HUS Logistics Procurement Department has seven categories but only four categories have experience in outsourcing procurements. For the Category Managers interviews 27 open-ended questions (Appendix 2 - 5) were asked to understand how the outsourcing process work, how they determine which procurements to outsource, what elements of procurement determine if it should be outsourced and how they experienced working together with consultants and how they see the future with using outsourced consultant companies. Questions for the Category Managers were mainly the same, only questions 1, 10, 11 and 14 in the question form were modified based on the information in the Procurement Calendar. The questions on the forms are in Finnish.

### 6.3 Collecting information

For the theoretical framework for this thesis literature, articles and charts were used to explain procurement theory. The framework of the thesis is constructed upon rules and guidelines of public procurement and the process of competitive tendering to which consultants must follow.

The material for the interview questions formed with the help of procurement literature, HUS Logistics documents, Procurement Calendar and Calendar of Competitive Tendering. The Procurement Calendar sampling from 24.10.2020 provided the most vital data concerning all outsourced procurements. The Procurement Calendar divided each procurement into product areas (goods or services), categories, followed lead time, status, value of the procurement and name of the outsourced consultant company. According to the data from the Procurement Calendar sampling there were 14 procurements that valued over 1 million. These 14 procurements belonged to goods (supplies) and service product areas, no equipment procurements were among these procurements. According to the sampling there are 8 smaller procurements valued under 60 000 € belonging to all three product areas. 28 competitive tenders were finished, belonging to all three product areas. (HUS Logistiikka 2020a; HUS Logistiikka 2020c).

Five interviews were conducted to find more in-depth information and data to answer the research question. These interviews were recorded with the permission of the interviewees. These interviews followed qualitative research methods with open-ended questions to find answers to the research questions. The Category Managers were asked 27 questions to have an open dialog about the HUS Logistics 92 outsourced competitive tenders to find out the current process of using consultants, how they determined which competi-

tive tenders to outsource and how Category Managers experienced working with consultants. Procurement Director's interview questions were constructed to understand the background, current situation and future strategy of using consultants in competitive tendering.

The first interview was conducted 28.10.2020 via Teams to interview Procurement Director. The Procurement Director were asked 12 open-ended questions to better understand the reasons of using consultant services. The interview took 21 minutes and it was transcribed into 1,5 pages of text including the questions. The answers of the interview are presented in chapter 5.

In HUS Logistics each procurement belongs to one of the seven categories (Figure 5), to have a better understanding of the 92 outsourced procurements four out of seven Category Managers that had outsourced procurements were interviewed. Interviews for the four Category Managers were conducted in four days. The second interview was in 30.10.2020 and conducted via Teams. The interview took 36 minutes and transcribed into 2,5 pages of text including the questions. The third interview took place in 2.11.2020 and lasted 1 h and 3 minutes, the transcribed text was 3,5 pages including the questions. Interview number 4 was conducted in 3.11.2020 and took 49 minutes, transcribed text was 3 pages. The last fifth interview was conducted in 5.11.2020. Interview lasted for 35 minutes and transcribed into 2,5 pages of text including the questions. The length of the interviews resulted with how in depth or how quickly the interviewee responded.

#### 6.4 Analyzing the material

The research interviews were conducted from week 44 and week 45 via Teams. The interviews were divided into five separate days to fit the schedule of the interviewees.

All five interviews were transcribed after the interviews. A total of 13 pages of text were transcribed. To analyze the four Category Managers interviews a brief summary was conducted of each question's answer to analyze the experiences, differences and similarities between the interviewees. The summaries from the interviews help to understand the process behind the current outsourcing process and which procurements are being selected to be outsourced. The research question aimed to see if there are similarities or patterns that could help determine when to use outsourced consultants and what makes an outsourced competitive tender a success.

The results from the Category Managers interviews are analyzed in chapter 7. The results are divided in nine themes and research findings and discussion chapter was written to sum up key points of the research results. A one solution fits all result wasn't found even

though similarities and shared perspectives among Category Managers answers were found. Outsourcing procurements are always viewed case by case and by the resources at hand.

## 7 RESULTS FROM THE INTERVIEWES

The four Category Managers were interviewed for this research to have an understanding how the newly incorporated use of outsourced consultants was working, when were they using consultants and what were the reasons behind it. The aim for this research is to analyze the 92 outsourced competitive tenders and see if there are similarities or patterns that could help determine when to use consultants for competitive tendering and if there are defining qualities that make an outsourced competitive tendering a success.

The four interviewees have extensive work experience in the field of procurement in different establishments. All of the Category Managers have joined HUS Logistics within 2,5 years.

### 7.1 The background of outsourcing tenders

At the end of 2019 the FCCA announced that it had found several dozen product groups where competitive tendering wasn't done. The decision to use consultants to help with procurements was made and several consultant companies were selected. (HUS Logistics 2020c).

Every procurement that comes to HUS Logistics is categorized under the seven procurement categories that HUS Logistics has (Figure 3). Out of these seven categories, four categories have had the need to outsource several competitive tenders to consultants. These four categories and their competitive tenders are examined and analyzed in this research section.

The number of outsourced tenders among these four categories differ from seven to 38 competitive tenders. Usually competitive tenders are referenced as purchased goods and services. To help understand better what sort of competitive tenders are outsourced, this research wants to clarify and divide goods and services into three product areas. Competitive tenders are divided into three product areas: Goods: Supplies, Goods: Equipment and Services. Figure 9 shows that Laboratory category and Primary Health Care category have outsourced tenders that belong to all three product areas.

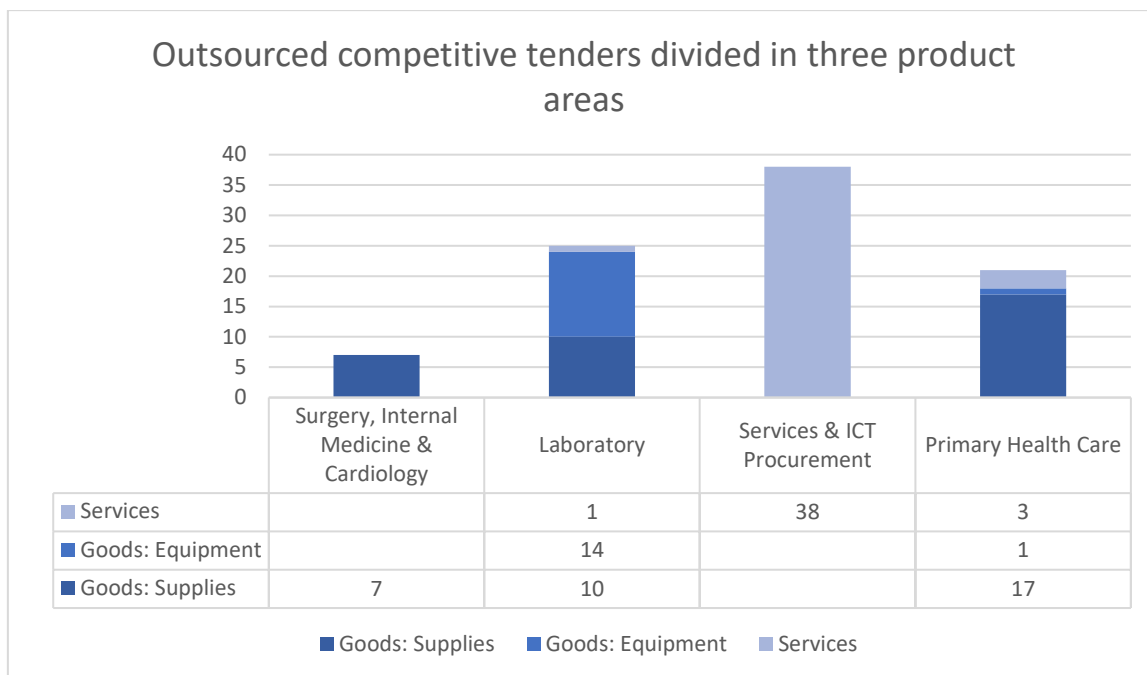


Figure 7. Outsourced tenders divided in three product areas.

Figure 7 shows how the number of outsourced competitive tenders are divided among three product areas. Surgery, Internal Medicine & Cardiology category has outsourced seven tenders in total and these competitive tenders belong to the Goods: Supplies-product area. Laboratory category has outsourced in total 25 competitive tenders, 10 of these are supplies (Goods), 14 equipment (Goods) and 1 belonging to the service product area. Services and ICT procurements-category has 38 outsourced competitive tenders that belong to the service product area. Primary Health Care category has 21 outsourced procurements, 17 of them are supplies, one equipment and one in the service product area. Figure 7 shows total 90 competitive tenders and not 92, because the four Category Managers and their categories had experience from outsourcing multiple competitive tenders. Two competitive tenders that are not included in this figure belong to two separate categories and had only one competitive tender each. For this research to analyze comprehensive experiences of using consultants, it chose to examine all 92 competitive tenders and their characteristics and focus the interview part on four categories that had multiple outsourced competitive tenders.

HUS Logistics uses its own Procurement Department extensively in all HUS procurements. Using outsourced consultants became a necessity to be able to carry out the extra competitive tenders that emerged. All the four Category Managers interviewed outsourced their categories competitive tenders because there weren't enough resources in HUS Logistics.

Category Manager for Laboratory category expressed that the need for outsourcing is always discussed with the Procurement Manager who manages the competitive tendering team in HUS Logistics. Procurement Manager assess if enough resources are in-house or if competitive tender should be outsourced. The decision is also made by assessing what kind of competitive tender it is. Laboratory category had outsourced some investment procurements successfully with a few months lead time. She experienced that with more complex competitive tenders it was more time-consuming and harder to have good results with outsourcing. Outsourcing “easier” competitive tenders helped her manage the workload and to figure out when to use consultants. (Ahokannas 2020).

Primary Health Care category has utilized Government Procurement entities Hansel and Sansia to combine competitive tendering into bigger entireties that are ongoing nationally. Understanding that the resources are limited and outsourcing should be used wisely, seeing the bigger picture helps to navigate what should be outsourced. Category Manager for Primary Health Care says that her competitive tenders have been easy to outsource because the outsourced tenders don't need specific substance competence that other categories may need. (Mujunen 2020).

Category Manager for Surgery, Internal medicine & Cardiology-category wanted to use this opportunity to pilot complicated competitive tender entireties to achieve innovative procurement. Having outsourced consultant opinions and different perspectives can help conquer obstacles and show new ways of doing things. These complex procurement entireties are still in the making so, the end result is still up in the air and the true success of this pilot can be measured only when it is ready. (Päivinen 2020).

For the Services and ICT procurements-category outsourcing the biggest amount of competitive tenders boils up to two things. The category name seemed to be a bit misleading because the category's role in ICT procurements is only subsidiary and assisting. Most of the outsourced procurements belonging to the independently working ICT department was made by their own estimate need for outsourcing. Not the Category Manager for Services and ICT procurements. One consultant works full-time for the ICT on helps with the competitive tenders and specific substance competence when needed. Asked about the process of choosing resources in-house or outsourcing, the Category Manager replied first checking what Procurement Specialists are currently working on and seeing if it would be possible for them to take another competitive tender. Also, trying to analyze what procurements are coming down the line in the near future and seeing if those can be done in-house or if they should be outsourced. Predicting the near future and what's coming has proven to be quite near-sighted. (Luomanpää 2020).

All the Category Managers are outsourcing competitive tenders because there aren't enough resources in HUS Logistics at the moment. Choosing what competitive tenders are outsourced differ and decision is made case-by-case. All Category Managers try to anticipate the future, see what procurements are coming and trying to rationalize the bigger picture when it comes to competitive tendering. The Laboratory category outsources more straightforward competitive tenders that can be executed in shorter lead times. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.2 Defining roles and responsibilities

The role for consultants was unanimously described among interviewees as preparing and planning tenders, being responsible for the technical implementation of tendering and helping with the specific substance competence. Job description was referenced to Procurement Specialist job description in HUS Logistics and the relationship between Category Manager and outsourced Consultant was portrayed as partnership rather than thinking consultants as employees.

In the outsourcing process Category Managers described their own role as guiding, following, supporting and helping consultants. Answering questions and being part of the follow-up meetings. The level of activity, when it comes to being part of the outsourced processes is up to the Category Managers themselves. Schedule, guidelines and agreeing how communication is being kept during the process are all agreed upon in the beginning stages between Category Manager and the consultant.

All Category Managers did follow-up meetings on a weekly basis. It is a chance to have a dialogue between Category Manager and consultant. And all of the Category Managers saw this valuable and vital for the outsourcing process. Status of the procurement, challenges, schedule and comments are exchanged during these weekly meeting and it is a chance for the consultant to update everything that is going on with category's competitive tender.

In the beginning of each outsourced competitive tender an estimated schedule is drafted to give guidelines. The given schedule is always the best estimate but it is quite common to have different variables along the way that prolong the process. The estimated schedule should not be too strict because it can create bottlenecks for the tendering process.

All interviewees agreed that having follow-up meetings weekly and regular contact with consultants helped outsourced competitive tenders to keep a sensible lead time and not prolong them. These meeting took time out of the Category Managers schedules but

helped keep an overall view of the outsourced process. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

### 7.3 Partnering up with consultants

When the FCCA announcement came HUS Logistics decided to do competitive tendering for outsourcing consultant services in 2019 to have more resources with competitive tenders. Several consultant companies were selected to help different themed procurements to go through the competitive tendering process.

Out from these researched 92 competitive tenders and four categories, HUS Logistics used consulting companies PTCSERVICE Oy, Sansia Oy, Valor partners Oy, Hansel Oy, Tmi Mons Vermis, Silver Planet Oy and KPMG Oy Ab.

All the interviewed Category Managers have outsourced some of their procurements to PTCServices. There are 58 outsourced procurements to PTCServices that divide quite evenly to all three product areas. Supplies 23 competitive tenders, Goods equipment 12 competitive tenders and services 23 competitive tenders. Other consultant companies that the four interviewed Category Managers have used are Valor Partners Oy, Sansia Oy, Hansel Oy, Silver Planet Oy and Tmi Mons Vermis. Outsourced procurements among these consultant companies are distributed into 32 procurements.

Before outsourcing is an option, a discussion with Procurement Manager for the competitive tendering team has been made to see if there are resources for doing the procurement in-house. Choosing the right consultant for categories to use comes from the list of contracted consultant services that were tendered in 2019.

Choosing and selecting between these consultant services can depend on their resources, schedule and specific substance competence. Category Manager for Laboratory category for example has mainly used same consultants and found it quicker and beneficial for the outsourced procurements. Trust and a working relationship is formed between this partnership and collaborating becomes easier and over time outsourcing more complex competitive tenders becomes more natural because of previous successful competitive tenders and knowing the consultant is reliable. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).



## 7.4 Possibilities and challenges

Benefits that comes from outsourcing competitive tenders to consultants is having more manageable schedule and a chance to focus on strategic procurements and other schedule projects.

Category Manager for Surgery, Internal medicine & Cardiology brings up a valuable point that having something outsourced opens possibilities for consultants to rethink and consider different approaches to execute competitive tenders. Instead of straining the high number of competitive tenders in-house and squeezing it to fit an already tight schedule. Not to mention not having enough time to really analyze and focus on different ways to do the procurement. (Päivinen 2020).

Executing public procurements is a necessity. Category Managers have gained new perspective on how procurement procedures are chosen, how tenders are defined and new things that categories can benefit in the future by having outsourced competitive tenders.

Challenges that the Category Managers have faced differs among managers. Some have had only good experiences with consultants, some found guiding consultants and the beginning stages of outsourcing very time-consuming on their part. Others pointed out that specific substance competence can vary quite heavily and knowing if someone's credentials are up to par is something that can't be figured out beforehand. Sometimes additional check-ups are needed to ensure that everything is proceeding. And sometimes even starting over is necessary, if competitive tendering process is taking too long and necessary competence to execute the competitive tendering isn't met.

Bottlenecks in the outsourcing process was divided among interviewees. Half of the interviewees said that the beginning stages of planning and preparing was time-consuming and slow. And the other interviewees said that during the end process when procurement decision and contract are being made, those stages have created situations that could be described as a bottleneck-stage in the outsourcing process.

When asked about the differences in consultants or consultant companies, all Category Managers noticed differences in methods being used among these contracted consultants. Few comments that surfaced was that other consultants have preferred methods to use or a template form of working. The other one was that other consultants are more active, comprehensive and independent when it comes to collaborating. The overall experience with all consultants was described to be positive. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.5 Successful outsourcing

Three of the categories have had 28 finished and successful outsourced competitive tenders. Surgery, Internal medicine & Cardiology-category has yet to have any finished outsourced competitive tenders. The three categories have had mainly good experiences with these finished competitive tenders. Judging by criteria that Category Managers consider important in competitive tendering: schedule, goals and execution, all finished competitive tenders were considered successful.

Category Managers evaluated success in outsourced process when the competitive tendering process is successful and a procurement award contract is born. This meant that competitive tendering stayed in schedule and it was done efficiently, goals and standards are met and added services (if there are any) have added extra value to the procurement. Successful procurement provides hospitals equipment and tools to enable quality health care. The Laboratory category has had both successful and unsuccessful competitive tendering experiences. The unsuccessful competitive tendering had been at a standstill for almost two months without any progress. Because of this the consultant was replaced and with the help of the new consultant the competitive tendering proceeded quickly and successfully. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.6 Procurement procedures

When asked about differences between outsourcing competitive tendering that belong to different product areas, answers between Category Managers differ. Category Manager for Primary Health Care had not noticed differences in outsourcing among goods and service competitive tendering, rather seeing challenges when it comes to outsourcing bigger procurement entireties. Outsourcing process seemed more slower and challenging when it came to outsource big entireties. Category Manager for Surgery, Internal medicine & Cardiology-category compared outsourcing similar to working with HUS Logistics own competitive tendering team. The only difference that he had noticed was the amount of groundwork categories had to do when tenders are not done in-house. Outsourced consultants can't log into HUS systems so they rely on the information and data given to them by Category Managers.

Category Manager for Services and ICT procurements analyzed differences between goods and services to be that goods require more attention when it comes to specifications. Service competitive tenders on the other hand are based on given description, so the importance of describing needed services determine what kind of service the hospitals

are getting. Outsourcing services require consultants more specific substance competence. Award contract is more prominent with services, there can't be any interruption of use when it comes to health care services and ICT. Category Manager for Laboratory has had experience outsourcing competitive tenders in all three product areas, she noticed that outsourcing equipment procurements has proved to be straightforward and expert's panels have been motivated to help consultants. She also pointed out that specifications have been precise and collaborations have been very successful in outsourcing equipment procurements.

When it came to naming challenges in outsourcing, all Category Managers thought that big procurement entireties have brought challenges in outsourcing and it's been the most time-consuming and troublesome part in outsourcing.

Procurement value doesn't play a big role when it comes to choosing which procurements should be outsourced or which procurements are considered easier than others, procurement procedures may differ but the procurement process itself is quite straightforward.

Knowing when to utilize consultant's specific substance competence in competitive tendering has also been a valuable resource for HUS Logistics in this outsourcing process. Deciding when to outsource competitive tendering, when specific substance competence is needed depends on consultant's knowledge and previous experience, if similar experience is found in-house there is no need to outsource procurements.

Asked about Reverse Auction in outsourced procurements and if it would for example help with procurements lead-time, the Category Managers couldn't say. Reverse Auction means a type of auction where tenderers bid for the prices at which they are willing to sell their goods and services. A reverse auction works only when there are many tenderers who offer goods and services to ensure the integrity of a competitive process. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020; PTC Services Oy 2019).

## 7.7 Commission Agreement

Commission agreement is made when a company purchases a specific service or a set of services from another company. With the help of the agreement both parties can check what was agreed upon. (Sopimustieto 2020).

In the commission agreement, an estimated schedule for the procurement is given and work tasks are divided among category and consultant. The estimated schedule functions as a guideline and is always based upon best evaluation made at that moment. Understanding that initial schedules don't always hold and different variables may appear.

Schedule and competitive tenders progress is supervised weekly among each category and the overall supervision of all outsourced procurements is done in HUS Logistics Procurement Department meetings.

When asked if divided work tasks in the commission agreement (Appendix 6) have raised occurring challenges, the answers are divided between beginning stages of planning and preparing and end-stages when contracts are prepared after competitive tendering. Category Manager for Surgery, Internal medicine & Cardiology reminds that same challenges regarding planning and preparing for procurements can also be found with in-house. Bigger the entirety is, bigger the challenge is to think about all aspects and achieve all goals. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.8 Functional Partnership

Newly adapted use of consultant services requires sharing information and experiences among categories. Valuable information and guidance come in handy when debating which competitive tender should be outsourced. Category Managers go through outsourced the status of their outsourced competitive tenders in their joint meetings with HUS Logistics Procurement Director. An overall situation of all outsourced competitive tenders is monitored to oversee the whole process.

Category Manager for Category Manager for Surgery, Internal medicine & Cardiology plans to present the outcome of his outsourced competitive tenders that have been executed with a more innovative approach. At the time of this research these innovative procurements have not yet finished.

Category Managers were satisfied with the result of outsourced procurements and the partnerships formed with consultants. When asked how to maintain and develop their partnership with consultants, the Category Managers had similar ideas and suggestions. Two of the Category Managers wanted to concentrate using same consultants for similar competitive tendering to maintain the same good quality. One added that having regular check-ups and monitoring data and procurement processes, HUS Logistics can improve outsourcing process in the future and see what is time-consuming and what can be develop.

During the outsourcing process feedback was given to consultants during the competitive tendering process and towards the end. All in all, feedback was given when the situation needed input or advice from the Category Managers. Two of the Category Managers gave feedback more frequently and collaborated with the consultants to help steer the process in the right direction when needed.

The other two also gave feedback during the procurement process if needed. Feedback was given mainly if something wasn't working or needed adjusting. Consultants also gave feedback quickly if input was needed. These two Category Managers had consultants that had a strong skillset, expertise and previous experience working with them, so frequent feedback wasn't considered necessary. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.9 Strategy for the Future

Category Managers all see the need for consultant services in the future. Having enough resources to execute procurements and have specific substance competence helps HUS Logistics to have more resources in hand and better their procurements to be more innovative.

HUS Logistics have used consultant services now for almost a year. Category Managers have each created a strategy for using consultants in competitive tendering that they have used and that they are implementing in the future.

Category Manager for Primary Health Care is going to continue outsourcing procurements to consultants and decide, depending on the procurement which ones should be outsourced.

For the Services and ICT procurements-category there were no strategy planned. Outsourcing competitive tenders were handled case-by-case. Use for extra hands is needed in the future and working with the consultants has been successful.

Category Manager for Surgery, Internal medicine & Cardiology has also been happy with the results of consultants and sees working with consultants as a way to bring valuable resources and help to executing procurements in the future.

For the Laboratory-category's competitive tendering done this year has helped form a partnership with consultants and if continued, bigger and more challenging entireties can be outsourced. Building strong partnerships allows HUS Logistics to succeed in procurements effectively and trusting on the good quality that the consultants offer. (Mujunen 2020; Luomanpää 2020; Päivinen 2020; Ahokannas 2020).

## 7.10 Research findings & discussions

The research interviews were conducted from week 44 and week 45. The Procurement Director were asked 12 open-ended questions to understand the background, current status and future plans to use consultant companies. His answers are seen in the theoretical part of the thesis in chapter 5.

For the research four Category Managers out of HUS Logistics seven categories were interviewed to help analyze and understand the 92 outsourced competitive tenders and data from documents and charts.

The aim for this thesis was to analyze the 92 outsourced competitive tenders and see if there are similarities or patterns that could help determine when to use consultants for competitive tendering and if there are defining qualities that make an outsourced competitive tendering a success.

Given that the use of consultant companies was quite new for HUS Logistics, it is understandable that the data for this research is limited as it dates back to last quarter of 2019. For the purpose of this research the collected data from documents, interviews, Procurement Calendar and charts was sufficient to conduct this research. The collected data showed competitive tenders in different stages of the competitive tendering process, small, midsize and big valued procurements, different procurement procedures, different consultant firms and different approaches managing the competitive tenders inside one's category.

The theoretical section of this thesis has shown the overall picture of public procurement, what it details and what steps consultants must go through in competitive tendering. By acknowledging the challenges and complexities of public procurement and understanding that this thesis does not provide an "one solution fits all" end result to its case company, rather than finding perspectives and similarities that may be utilized further in the future.

The conclusions that the research provided was that The Category Managers had a very similar approach, vision and strategy for outsourcing competitive tenders. It can almost be described as Category Managers are trying to anticipate the future, see what procurements are coming down the line and trying to figure out the bigger picture so that they can choose resources accordingly.

From this accomplished research, two different approaches to outsourcing has surfaced. The more practical and common approach that offers categories more resources to do competitive tenders and the innovative approach that were used for piloting bigger and

more complex procurement. The more practical approach focuses on generating quality contract award decisions that the outsourcing enables and frees up time for the categories. The innovative approach wants to challenge consultants and see how they solve and execute those competitive tendering. Both approaches serve a valuable purpose and both verify parts of the theoretical portion of this thesis.

For this research it was important to understand whether there were certain characteristics of procurement or in competitive tendering that seemed to postpone lead time or cause problems in the outsourcing process. For example, investment procurements that were outsourced and mainly consists of equipment had a short lead time of two months. These procurements also had expert panel's that were motivated to be part of the process and worked closely together with consultants. The more complex a procurement is, the more time-consuming and harder outsourcing can be. Based by the conducted interviews complexity and bigger procurement entireties had more challenges, required more participation from the Category Managers and had recurrent bottlenecks in the outsourcing process. For example, bigger the procurement chances were that data and information was needed from the HUS systems, where consultants can't log into and they rely on the information and data given to them by Category Managers. This takes time for both parties and makes competitive tendering for the consultants harder because they don't understand how the system works, they can't use it and cooperating becomes more limiting. The value of the procurements didn't play any major role in competitive tendering when it came to shorter lead time neither did procurement procedures. Bigger and complex procurements took longer as was expected but it does not prevent outsourcing.

The strategy and use of consultant in the future was seen as a valuable and a needed resource. Especially when partnerships with consultants were established during multiple collaborations. But also understanding and valuing the procurement competence that HUS Logistics has in-house.

## 8 CONCLUSION

Using consultant companies for competitive tendering can be a valuable resource. Using outsourced resources can help organization to divide their time better and reach their strategic objectives. Outsourced resources such as procurement consulting services have specific substance competence that can help contracting authorities have more innovative procurement and have more resources. HUS Logistics need for consultant services came after the FCCA announcement and was made to harness extra resources for HUS Logistics. Procurement legislation allows procurement authorities to use consultant companies when it adds to the quality of the procurement and ensures equality in competitive tendering.

Even though the use of consultant services is not new to many companies in these days, for HUS Logistics this was a needed resource that made possible to execute competitive tendering on these product groups on time. HUS Logistics outsourced 92 competitive tenders to consultants. With the help of the already existing data from the outsourced competitive tenders, the groundwork for this thesis was formed. The Procurement Calendar had data and numbers for outsourcing but not the reasons and the processes behind it.

The theory section of this thesis was constructed using procurement literature, articles and charts to explain public procurement, competitive tendering and procurement competence. The qualitative research method was chosen to conduct this research for its technique to capture accurate and in-depth insights from focus groups. The material for the interview questions formed from procurement literature, HUS Logistics documents, Procurement Calendar and Calendar of Competitive Tendering. The Procurement Calendar sampling from 24.10.2020 provided the most vital data concerning all outsourced procurements. Semi-structured interviews were conducted for HUS Logistics Procurement Director and four Category Managers that had outsourced competitive tenders. (HUS Logistiikka 2020a; HUS Logistiikka 2020c).

### 8.1 Research questions

This research had one main question: *When to use consultants for competitive tendering?* and second supporting question: *Are there defining qualities that makes an outsourced competitive tendering a success?*

For the purpose of this research the collected data from documents, interviews, Procurement Calendar and charts was sufficient to conduct research material and executing the interviews to provide answers to the research questions. Still acknowledging the fact that



with the nature of public procurement certain challenges and complexities are understandable and may result to not having a “one solution fits all” end result. This research focuses on the findings that it generated in the form of perspectives and similarities that the interviews surfaced. HUS Logistics, the case company for this thesis can utilize these findings further in the future by having regular check-ups and monitoring data and procurement processes to improve outsourcing process in the future.

The conclusions that the research provided was that The Category Managers had similar motives on how they approached outsourcing, what was their vision and strategy. The option on whether to outsource competitive tender is always viewed case-by-case and seeing what are resources inside the organization. Also, trying to plan and see what is coming down the line and trying to figure out order of importance, whether competitive tendering relies heavily on the information of HUS systems or whether or not specific substance competence is found in-house or if it should be outsourced. Two approaches surfaced for using consultants in competitive tendering. The more practical and common approach that surfaced was categories having more resources to do competitive tenders, where the focus is on generating quality contract award decisions and frees up time for the categories. The second approach was surrounded with the concept of innovation, where consultants are challenged to solve and execute complex procurements and use their specific substance competence. Both were found meaningful and equally valuable in the use of consultant services.

For the second supporting research question: Are there defining qualities that makes an outsourced competitive tendering a success? Few similar characteristics were described as a successful outsourcing. For example, when competitive tendering stayed in schedule and it was done efficiently and the goals and standards that were set on planning and preparing stages were met. Also, when added services (if there were any) had added extra value to the procurement. Recognizing bottlenecks in procurements to help avoid them early on and have a successful experience and defining new operating models and processes to ensure shorter lead time and having good quality competitive tenders.

## 8.2 Reliability, validity and ethics

Reliability, validity and good ethics are part of every research and are necessary components to ensure quality in any research.

Reliability measures the reliability and accuracy of the research result. Reliability and validity in qualitative research ensure that the process is proactive and evaluated multiple times during the research, not just after the interviews. Validity tells how well the used

measurement is measuring. Research validity can be divided into internal and external. The internal validity refers to how the research findings match reality. (Business Research Methodology 2020).

Ensuring that the sampling coverage is large enough for the qualitative research is important. The purpose of sampling is not to cover all items or elements rather selecting a specific sampling method that fits on the aim and objectives of the research.

The sampling used for this thesis research was obtained from HUS Logistics Procurement Calendar. This thesis will not publish any of the HUS Logistics documents as it is the property of HUS Logistics. This research analyzes and examines the material given and in return aims to provide a comprehensible outcome of using consultants in competitive tendering in HUS Logistics. (Business Research Methodology 2020; HUS Logistiikka 2020a).

The research material for this thesis was obtained with permission of the case company HUS Logistics. All ongoing competitive tendering that HUS Logistics does can be found in Hilma and their own website. The material obtained from HUS Logistics is used only for collecting data for the numbers and information of outsourced competitive tendering for this thesis. Conducted semi-structured interviews were recorded and transcribed with the permission of the interviewees. Transcribed documents are not published with this thesis nor will they be public information. Before this thesis is published, it will be read by the contact person named for this research.

The ethical considerations must be present in the thesis and research process. Full consent should be obtained from the case company before starting the study and ensuring the protection of privacy of the case company and confidentiality of the research data. (Bryman & Bell 2007,128).

### 8.3 Future research recommendations

This research focused on HUS Logistics view of using consultants in competitive tendering. A further study for HUS Logistics could be having regular check-ups and monitoring data and procurement processes to improve outsourcing process in the future and see what is time-consuming and what can be develop in the outsourcing process. The use of consultants in competitive tendering is newly adapted in HUS Logistics and this research was the first research made from outsourced competitive tendering. In the future, more data is cumulated so that more patterns and challenges can be recognized if further researches are implemented.

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## APPENDICES

### Appendix 1. Semi-Structured Interview / Theme Interview structure / Teemahaastattelu.

#### Hankintajohtajan haastattelu

#### Interviewee's background information / Haastateltavan taustatiedot:

- Nimi
- Titteli
- Työkokemus hankinnan alalta

#### Teemat, tarkentavat kysymykset:

1. Miksi konsulttipalveluita käytetään HUS Logistiikassa?
2. Onko aikaisempina vuosina käytetty konsulttipalveluita?
3. Miten kilpailutusten ulkoistaminen näkyy osana HUS Logistiikan visiota vuonna 2020 ja tulevaisuudessa?
4. Keitä ovat nämä konsulttiyritykset, joita HUS Logistiikka käyttää ja miten heidät on valittu?
5. Miten yhteistyö konsulttiyritysten kanssa on sujunut?
6. Onko esille noussut jotain sellaista mitä konsulteilta olisi opittu ja mitä HUS Logistiikka voisi itse hyödyntää jatkossa?
7. Onko esille noussut jotain haasteita konsulttipalveluiden käytössä, mikä pitäisi ottaa huomioon jatkossa ja mitä HUS Logistiikan pitäisi kehittää?
8. Kuinka tärkeänä näet konsulttipalveluiden käytön jatkossa?
9. Riittääkö HUS Logistiikan omat resurssit kilpailutuksiin vai näetkö konsulttipalveluiden käyttämisen jatkossa välttämättömänä?
10. Onko ulkoistetuille kilpailutuksille olemassa budjettia?
11. Voisiko esim. "Ranskalaista urakka"-mallia hyödyntää jatkossa?
12. Oletteko saaneet palautetta konsulttiyrityksiltä kilpailutuksiin liittyen ja oletteko antaneet palautetta konsulteille? (Jos kyllä, minkälaista palaute oli?)



## Appendix 2. Semi-Structured Interview / Theme Interview structure / Teemahaastattelu.

Interviewee / Haastateltava: Kategoriapäällikkö - Perusterveydenhuollon laitteet ja tarvikkeet

Interviewee's background information / Haastateltavan taustatiedot:

- Nimi
- Titteli
- Työkokemus hankinnan alalta

Teemat, tarkentavat kysymykset:

(Osa kysymyksistä on tehty Hankintakalenterin 24.10.2020 tietoja apuna käyttämällä).

1. Perusterveydenhuollon laitteet ja tarvikkeet- kategorialla on 21 ulkoistettua kilpailutusta, miksi näihin kilpailutuksiin käytetään konsulttipalveluita?
2. Kategoriapäällikkö vastaa oman kategoriansa hankinnoista. Mitkä tekijät vaikuttavat päätökseesi kilpailutetaanko hankinta talon sisällä vai ulkoistetaanko se?
3. Mikä on konsulttipalvelun rooli ulkoistetussa kilpailutuksessa?
4. Mikä kategoriapäällikön rooli on ulkoistetussa kilpailutuksessa?
5. Miten kategoriapäällikkö varmistaa, että ulkoistetun kilpailutuksen tavoitteet, aikataulu ja odotukset toteutuvat?
6. Mitä konsulttiyritystä/ yrityksiä kategoriasi on käyttänyt?
7. Miten päätetään, mitä konsulttiyritystä käytetään kussakin ulkoistetussa kilpailutuksessa?
8. Mitä mahdollisuuksia konsulttipalveluiden käyttö mahdollistaa?
9. Mitä haasteita konsulttipalveluiden käyttö tuo?
10. Kategoriassasi on tällä hetkellä 5 valmistunutta kilpailutusta, kaikki tarvikkeita. Ollivatko nämä ulkoistetut kilpailutukset onnistuneita? Mikä tekee kilpailutuksesta onnistuneen?
11. Perusterveydenhuollon laitteet ja tarvikkeet- kategorialla on kaikkiin kolmeen tuotealueeseen kuuluvia ulkoistettuja kilpailutuksia. Oletko huomannut merkittäviä eroja

- tarvike-, laite- ja palvelukilpailutusten välillä, onko joku näistä kolmesta tuotealueesta helpompi ulkoistaa?
12. Miten eri hankintamenettelyt, hankinnan kokonaisuus tai hankinnan arvo vaikuttavat ulkoistettuihin kilpailutuksiin?
  13. Toimeksiantosopimuksessa sovitaan konsultin työmääräarvio ja toimeksiannon aikataulu, miten hyvin nämä työmääräarviot toteutuvat ja miten varmistetaan, että ulkoistettu kilpailutus etenee eikä läpimenoaika pitkity turhaan (Appendix 6)?
  14. Perusterveydenhuollon laitteet ja tarvikkeet- kategorian valmistuneiden kilpailutusten läpimenoaika vaihtelee 3 kk – 8 kk välillä. Pystyttäisiinkö läpimenoaikaa lyhentämään ulkoistetuissa kilpailutuksissa, jos esimerkiksi käytettäisiin ranskalainen urakka-mallia?
  15. Toimeksiantosopimuksessa luetellaan työnjako HUSin ja toimittajan välillä. Onko näistä työnjaon vaiheista jokin vaihe nostanut esiin toistuvia haasteita ulkoistetuissa kilpailutuksissa?
  16. Oletko havainnut tiettyjä toistuvia haasteita tai ns. ”pullonkaulaa” ulkoistetuissa kilpailutuksissa?
  17. Kun konsulttipalveluita käytetään, toimiiko vuorovaikutus ja yhteistyö?
  18. Onko vuorovaikutusta ja yhteistyötä mielestäsi tarpeeksi?
  19. Kategoriapäällikkö vastaa oman kategoriansa ulkoistetuista kilpailutuksista. Millä tavalla kategoriasi kilpailutuksia seurataan ja kuinka usein seuranta tehdään?
  20. Miten tiedonjako ja yhteistyö kategorioiden välillä toimii konsulttipalveluihin liittyvissä asioissa?
  21. Oman kokemuksesi perusteella, minkälaisia eroavaisuuksia konsulttien / konsulttiyritysten välillä esiintyy?
  22. Miten yhteistyötä konsulttien kanssa voitaisiin mielestäsi parantaa?
  23. Annetaanko konsulteille / konsulttiyrityksille palautetta yhteistyön aikana tai sen jälkeen?
  24. Miten kilpailutuksissa käytetään HUS Logistiikan omia resursseja parhaiten hyödyksi?

25. Kuinka tärkeänä näet konsulttipalveluiden käytön tulevaisuudessa?
26. Riittääkö HUS Logistiikan omat resurssit kilpailutuksissa vai näetkö konsulttipalveluiden käyttämisen jatkossa tarpeellisenä lisätyövoimana tai substanssiosaamisen asiantuntijana kilpailutuksissa?
27. Mikä on oman kategoriasi strategia ulkoistettujen kilpailutusten suhteen? kuinka se on toteutunut vuoden 2020 aikana ja miten sovellat sitä jatkossa?

### Appendix 3. Semi-Structured Interview / Theme Interview structure / Teemahaastattelu.

Interviewee / Haastateltava: Kategoriapäällikkö – Palvelu- ja ICT hankinnat

Interviewee's background information / Haastateltavan taustatiedot:

- Nimi
- Titteli
- Työkokemus hankinnan alalta

Teemat, tarkentavat kysymykset:

(Osa kysymyksistä on tehty Hankintakalenterin 24.10.2020 tietoja apuna käyttämällä).

1. Palvelu ja ICT hankinnat- kategorialla on 38 ulkoistettua kilpailutusta, miksi näihin kilpailutuksiin käytettiin konsulttipalveluita?
2. Kategoriapäällikkö vastaa oman kategoriansa hankinnoista. Mitkä tekijät vaikuttavat päätökseesi kilpailutetaanko hankinta talon sisällä vai ulkoistetaanko se?
3. Mikä on konsulttipalvelun rooli ulkoistetussa kilpailutuksessa?
4. Mikä kategoriapäällikön rooli on ulkoistetussa kilpailutuksessa?
5. Miten kategoriapäällikkö varmistaa, että ulkoistetun kilpailutuksen tavoitteet, aikataulu ja odotukset toteutuvat?
6. Mitä konsulttiyritystä/ yrityksiä kategoriasi on käyttänyt?
7. Miten päätetään, mitä konsulttiyritystä käytetään kussakin ulkoistetussa kilpailutuksessa?
8. Mitä mahdollisuuksia konsulttipalveluiden käyttö mahdollistaa?
9. Mitä haasteita konsulttipalveluiden käyttö tuo?
10. Kategoriassasi on tällä hetkellä 17 valmistunutta kilpailutusta. Olivatko nämä ulkoistetut kilpailutukset onnistuneita? Miten määrittelisit onnistuneen kilpailutuksen?
11. Palvelu ja ICT hankinnat- kategorialla on kaikkien hankintakategorioiden kesken eniten ulkoistettuja kilpailutuksia. Mitä palvelujen kilpailuttamisessa pitää ottaa huomioon, mitä tavara- ja laitekilpailutuksissa ei esimerkiksi tarvitse miettiä. Koetko palvelukilpailutusten olevan helppo ulkoistaa?

12. Miten eri hankintamenettelyt, erikoissairaanhoido, hankinnan kokonaisuus tai hankinnan arvo vaikuttavat ulkoistettuihin kilpailutuksiin?
13. Toimeksiantosopimuksessa sovitaan konsultin työmääräarvio ja toimeksiannon aikataulu, miten hyvin nämä työmääräarviot toteutuvat ja miten varmistetaan, että ulkoistettu kilpailutus etenee eikä läpimenoaika pitkity turhaan (Appendix 6)?
14. Palvelu ja ICT hankinnat- kategorian valmistuneiden kilpailutusten läpimenoaika vaihtelee 2 kk – 5 kk välillä. Suurin osa kilpailutuksista pystytään kuitenkin tekemään 2-3 kk. Mistä lyhyempi läpimenoaika johtuu, verrattuna esimerkiksi laite tai tarvikekilpailutuksiin?
15. Toimeksiantosopimuksessa luetellaan työnjako HUSin ja toimittajan välillä. Onko näistä työnjaon vaiheista jokin vaihe nostanut esiin toistuvia haasteita ulkoistetuissa kilpailutuksissa?
16. Oletko havainnut tiettyjä toistuvia haasteita tai ns. ”pullonkaulaa” ulkoistetuissa kilpailutuksissa?
17. Kun konsulttipalveluita käytetään, toimiiko vuorovaikutus ja yhteistyö konsulttien kanssa?
18. Onko vuorovaikutusta ja yhteistyötä mielestäsi tarpeeksi?
19. Miten tiedonjako ja yhteistyö kategorioiden välillä toimii konsulttipalveluihin liittyvissä asioissa?
20. Millä tavalla kategoriasi kilpailutuksia seurataan, miten varmistat kilpailutuksen etenemisen ja kuinka usein seuranta tehdään?
21. Oman kokemuksesi perusteella, minkälaisia eroavaisuuksia konsulttien / konsulttiyritysten välillä on ilmennyt?
22. Miten yhteistyötä konsulttien kanssa voitaisiin mielestäsi parantaa?
23. Annetaanko konsulteille / konsulttiyrityksille palautetta yhteistyön aikana tai sen jälkeen?
24. Miten kilpailutuksissa käytetään HUS Logistiikan omia resursseja parhaiten hyödyksi?
25. Kuinka tärkeänä näet konsulttipalveluiden käytön tulevaisuudessa?

26. Riittääkö HUS Logistiikan omat resurssit kilpailutuksissa vai näetkö konsulttipalveluiden käyttämisen jatkossa tarpeellisenä lisätyövoimana tai substanssiosaamisen asiantuntijana kilpailutuksissa?
27. Mikä on oman kategoriasi strategia ulkoistettujen kilpailutusten suhteen? kuinka se on toteutunut vuoden 2020 aikana ja miten sovellat sitä jatkossa?

Appendix 4. Semi-Structured Interview / Theme Interview structure / Teemahaastattelu.  
Interviewee / Haastateltava: Kategoriapäällikkö – Kirurgia ja sisätaudit sekä kardiologia.

Interviewee's background information / Haastateltavan taustatiedot:

- Nimi
- Titteli
- Työkokemus hankinnan alalta

Teemat, tarkentavat kysymykset:

(Osa kysymyksistä on tehty Hankintakalenterin 24.10.2020 tietoja apuna käyttämällä).

1. Kirurgia ja sisätaudit sekä kardiologia- kategorialla on 7 ulkoistettua kilpailutusta, miksi näihin kilpailutuksiin käytettiin konsulttipalveluita?
2. Kategoriapäällikkö vastaa oman kategoriansa hankinnoista. Mitkä tekijät vaikuttavat päätökseesi kilpailutetaanko hankinta talon sisällä vai ulkoistetaanko se?
3. Mikä on konsulttipalvelun rooli ulkoistetussa kilpailutuksessa?
4. Mikä kategoriapäällikön rooli on ulkoistetussa kilpailutuksessa?
5. Miten kategoriapäällikkö varmistaa, että ulkoistetun kilpailutuksen tavoitteet, aikataulu ja odotukset toteutuvat?
6. Mitä konsulttiyritystä/ yrityksiä kategoriasi on käyttänyt?
7. Miten päätetään, mitä konsulttiyritystä käytetään kussakin ulkoistetussa kilpailutuksessa?
8. Mitä mahdollisuuksia konsulttipalveluiden käyttö mahdollistaa?
9. Mitä haasteita konsulttipalveluiden käyttö tuo?
10. Miten määrittelisit onnistuneen kilpailutuksen?
11. Kirurgia ja sisätaudit sekä kardiologia- kategorialla on vähiten ulkoistettuja kilpailutuksia tutkittavien hankintakategorioiden kesken. Mitä tarvike- ja laitekilpailutuksissa pitää ottaa huomioon, kun se ulkoistetaan ja koetko tarvikekilpailutusten olevan helppo ulkoistaa?

12. Miten eri hankintamenettelyt, erikoissairaanhoido, hankinnan kokonaisuus tai hankinnan arvo vaikuttavat ulkoistettuihin kilpailutuksiin?
13. Toimeksiantosopimuksessa sovitaan konsultin työmääräarvio ja toimeksiannon aikataulu, miten hyvin nämä työmääräarviot toteutuvat ja miten varmistetaan, että ulkoistettu kilpailutus etenee eikä läpimenoaika pitkity turhaan (Appendix 6)?
14. Kategoriasi valmistuneiden kilpailutusten läpimenoaika vaihtelee 5 kk – 14 kk välillä. Pystyttäisiinkö läpimenoaikaa lyhentämään ulkoistetuissa kilpailutuksissa, jos esimerkiksi käytettäisiin ranskalainen urakka-mallia?
15. Toimeksiantosopimuksessa luetellaan työnjako HUSin ja toimittajan välillä. Onko näistä työnjaon vaiheista jokin vaihe nostanut esiin toistuvia haasteita ulkoistetuissa kilpailutuksissa?
16. Oletko havainnut tiettyjä toistuvia haasteita tai ns. ”pullonkaulaa” ulkoistetuissa kilpailutuksissa?
17. Kun konsulttipalveluita käytetään, toimiiko vuorovaikutus ja yhteistyö konsulttien kanssa?
18. Onko vuorovaikutusta ja yhteistyötä mielestäsi tarpeeksi?
19. Miten tiedonjako ja yhteistyö kategorioiden välillä toimii konsulttipalveluihin liittyvissä asioissa?
20. Millä tavalla kategoriasi kilpailutuksia seurataan, miten varmistat kilpailutuksen etenemisen ja kuinka usein seuranta tehdään?
21. Oman kokemuksesi perusteella, minkälaisia eroavaisuuksia konsulttien / konsulttiyritysten välillä on ilmennyt?
22. Miten yhteistyötä konsulttien kanssa voitaisiin mielestäsi parantaa?
23. Annetaanko konsulteille / konsulttiyrityksille palautetta yhteistyön aikana tai sen jälkeen?
24. Miten kilpailutuksissa käytetään HUS Logistiikan omia resursseja parhaiten hyödyksi?
25. Kuinka tärkeänä näet konsulttipalveluiden käytön tulevaisuudessa?



26. Riittääkö HUS Logistiikan omat resurssit kilpailutuksissa vai näetkö konsulttipalveluiden käyttämisen jatkossa tarpeellisenä lisätyövoimana tai substanssiosaamisen asiantuntijana kilpailutuksissa?
27. Mikä on oman kategoriasi strategia ulkoistettujen kilpailutusten suhteen? kuinka se on toteutunut vuoden 2020 aikana ja miten sovellat sitä jatkossa?

Appendix 5. Semi-Structured Interview / Theme Interview structure / Teemahaastattelu.  
Interviewee / Haastateltava: Kategoriapäällikkö – Laboratorio.

Interviewee's background information / Haastateltavan taustatiedot:

- Nimi
- Titteli
- Työkokemus hankinnan alalta

Teemat, tarkentavat kysymykset:

(Osa kysymyksistä on tehty Hankintakalenterin 24.10.2020 tietoja apuna käyttämällä).

1. Laboratorion kategorialla on 24 ulkoistettua kilpailutusta, miksi näihin kilpailutuksiin käytettiin konsulttipalveluita?
2. Kategoriapäällikkö vastaa oman kategoriansa hankinnoista. Mitkä tekijät vaikuttavat päätökseesi kilpailutetaanko hankinta talon sisällä vai ulkoistetaanko se?
3. Mikä on konsulttipalvelun rooli ulkoistetussa kilpailutuksessa?
4. Mikä kategoriapäällikön rooli on ulkoistetussa kilpailutuksessa?
5. Miten kategoriapäällikkö varmistaa, että ulkoistetun kilpailutuksen tavoitteet, aikataulu ja odotukset toteutuvat?
6. Mitä konsulttiyritystä/ yrityksiä kategoriasi on käyttänyt?
7. Miten päätetään, mitä konsulttiyritystä käytetään kussakin ulkoistetussa kilpailutuksessa?
8. Mitä mahdollisuuksia konsulttipalveluiden käyttö mahdollistaa?
9. Mitä haasteita konsulttipalveluiden käyttö tuo?
10. Kategoriallasi on tällä hetkellä 5 valmistunutta ulkoistettua kilpailutusta, 4 laitetta ja 1 tarvike kilpailutus. Olivatko nämä ulkoistetut kilpailutukset onnistuneita? Miten määrittelisit onnistuneen kilpailutuksen?
11. Laboratorio-kategorialla on kaikkiin kolmeen tuotealueeseen kuuluvia ulkoistettuja kilpailutuksia. Oletko huomannut merkittäviä eroja tarvike-, laite- ja palvelukilpailutusten välillä, onko joku näistä kolmesta tuotealueesta helpompi ulkoistaa?

12. Miten eri hankintamenettelyt, erikoissairaanhoido, hankinnan kokonaisuus tai hankinnan arvo vaikuttavat ulkoistettuihin kilpailutuksiin?
13. Toimeksiantosopimuksessa sovitaan konsultin työmääräarvio ja toimeksiannon aikataulu, miten hyvin nämä työmääräarviot toteutuvat ja miten varmistetaan, että ulkoistettu kilpailutus etenee eikä läpimenoaika pitkity turhaan (Appendix 6)?
14. Kategoriasi valmistuneiden kilpailutusten läpimenoaika vaihtelee 3 kk – 8 kk välillä. Pystyttäisiinkö läpimenoaikaa lyhentämään ulkoistetuissa kilpailutuksissa, jos esimerkiksi käytettäisiin ranskalainen urakka-mallia?
15. Toimeksiantosopimuksessa luetellaan työnjako HUSin ja toimittajan välillä. Onko näistä työnjaon vaiheista jokin vaihe nostanut esiin toistuvia haasteita ulkoistetuissa kilpailutuksissa?
16. Oletko havainnut tiettyjä toistuvia haasteita tai ns. ”pullonkaulaa” ulkoistetuissa kilpailutuksissa?
17. Kun konsulttipalveluita käytetään, toimiiko vuorovaikutus ja yhteistyö konsulttien kanssa?
18. Onko vuorovaikutusta ja yhteistyötä mielestäsi tarpeeksi?
19. Miten tiedonjako ja yhteistyö kategorioiden välillä toimii konsulttipalveluihin liittyvissä asioissa?
20. Millä tavalla kategoriasi kilpailutuksia seurataan, miten varmistat kilpailutuksen etenemisen ja kuinka usein seuranta tehdään?
21. Oman kokemuksesi perusteella, minkälaisia eroavaisuuksia konsulttien / konsulttiyritysten välillä on ilmennyt?
22. Miten yhteistyötä konsulttien kanssa voitaisiin mielestäsi parantaa?
23. Annetaanko konsulteille / konsulttiyrityksille palautetta yhteistyön aikana tai sen jälkeen?
24. Miten kilpailutuksissa käytetään HUS Logistiikan omia resursseja parhaiten hyödyksi?
25. Kuinka tärkeänä näet konsulttipalveluiden käytön tulevaisuudessa?

26. Riittääkö HUS Logistiikan omat resurssit kilpailutuksissa vai näetkö konsulttipalveluiden käyttämisen jatkossa tarpeellisenä lisätyövoimana tai substanssiosaamisen asiantuntijana kilpailutuksissa?
27. Mikä on oman kategoriasi strategia ulkoistettujen kilpailutusten suhteen? Kuinka se on toteutunut vuoden 2020 aikana ja miten sovellat sitä jatkossa?



Appendix 6.

TILAUS

73 (78)

**Sovittu työnjako ja työmääräarvio**

X = vastuussa tehtävän läpiviennistä

Tehtävä	HUS	Toimittaja
Kilpailutuksen alkumateriaalin ja lähtötietojen ”hand in”		
Hankinnan kohteen määrittely, vetovastuu, sis. mm. <ul style="list-style-type: none"> <li>HUS asiantuntijoiden haastattelut ja käyttäjien tarpeiden selvitys</li> <li>tarvittavat kokoukset HUS henkilöiden kanssa</li> <li>hankintamallin ehdottaminen</li> </ul>		
Mahdolliset valtakirjat tms. yhteishankinnan osapuolten kontaktointi sekä asiantuntijaryhmän nimeäminen		
Markkinakartoitus ja tekninen vuoropuhelu		
Tarjouspyynnön ja liitteiden laatiminen ja viimeistely sovitulla tavalla		
HUS antaa tarvittavat käyttöoikeudet Cloudia-järjestelmään.		
Tarjouspyynnön hyväksyttäminen ja lupa julkaista tarjouspyyntö		
Kaikki tarvittavat toimet tarjousajan kuluessa (ml. kysymysten ja vastausten koordinointi)		
Tarjousten avaus, soveltuvuustarkistus		
Tarjousten tarjouspyynnön mukaisuuden tarkistus (yhdessä sovitulla tavalla)		
Mahdolliset täsmennykset tarjouksiin (yhdessä sovitusti)		
Tarjousten vertailun koordinointi, vertailuun osallistuminen/ avustaminen niissä osioissa, missä mahdollista		
Hankintapäätöstekstin ja liitteiden valmistelu		
HUS ohjeistaa päätösprosessin ja hankintapäätösten lähettämisen erikseen.		
Selvitysten pyytäminen (ml. rikosrek.otteet) ja tarkastaminen tarjoajilta		
Sopimusten viimeistely ja kokoaminen valituille tarjoajille		
Sopimusten allekirjoitusjärjestelyt		
Jälki-ilmoitus		

**Muuta:**

Toimeksiannossa käytetään soveltuvien osien HUSin asiakirjapohjia.

Toimittajan nimeämä asiantuntija/tiimi, yleisvastuut ja tehtävät:

- huolehtii kaikkien projektiin kuuluvien tehtävien suorittamisesta ajallaan
- raportoi projektin tilanteesta säännöllisesti HUS:n yhteyshenkilölle
- huolehtii että projektiin osallistuvien tahojen työsuoritukset saadaan ajallaan
- huolehtii kaikista hankintalain edellyttämistä ilmoituksista
- jollei toisin ole erikseen sovittu, huolehtii kaikista Cloudia-kilpailutusjärjestelmään liittyvistä tehtävistä kilpailutusprosessissa
- kokoaa kilpailutuksen kannalta olennaisen materiaalin ja viestinvaihdon tiedostoiksi ja toimittaa ne HUS:lle arkistoitavaksi erikseen sovitulla tavalla
- muut erikseen kirjallisesti sovitut tehtävät