

# Development of a Project management tool

## Terms of references

ANIMA Investment Network

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## Context and strategic needs

### Our organization

ANIMA Investment Network is a platform for economic cooperation between Europe, the Middle East and Africa. It develops and implements initiatives to build investment and business environments for an attractive, sustainable and inclusive economy. The ANIMA network brings together 70 member organisations in 20 countries, and offers expertise in economic development and cooperation, investment promotion and impact management, territorial marketing, innovation development and resource mobilisation of expatriate talent. [anima.coop](https://anima.coop)

### The project Euromed Cluster Forward

The project Euromed Clusters Forward is cofunded by the European union. It aims to empower clusters during the upcoming 4 years, to promote inclusive innovation and competitiveness in the Euromed region in order to enhance growth, economic diversification, sustainable development and employment.

More specifically, the project is focusing on improving the regulatory framework of clusters and incentives for collaboration between the quintuple helix to develop member companies and their competitiveness.

It also improves the capacities of cluster organisations to develop forward-looking strategies and provide quality services to their members, increasing their business performance, innovation capacity and job creation.

Finally, the project aims to activate Euromed value chains by promoting forward-looking sectoral visions and supporting the creation of alliances of EU and Southern Mediterranean clusters in key regional value chains.

## Context and objectives of the project management platform

### Context

After more than fifteen years of experience in managing complex multi-partner projects as a leader, ANIMA wishes to professionalise its coordination tools and processes and to equip itself with a digital project management platform.

The launch of the Euromed Clusters Forward project is an opportunity to develop, implement and adopt this new tool. The platform will allow ANIMA to rationalise its coordination efforts with its partners, to reinforce the efficiency of its project management and to optimise its operational, administrative and budgetary monitoring processes.

This platform will have to meet the needs identified by ANIMA and its partners by proposing specific functionalities and allowing them to evolve.

### Types of use of the platform

In addition to being a tool for managing its projects, ANIMA would like this platform to rationalise some of the processes and tools in place within the organisation. Also, the tool must be able to differentiate the use of ANIMA from that of the project partners by offering differentiated access and functionalities in relation to these different types of use.

With this platform, ANIMA wishes to respond to two types of use:

- Ensure the management of multi-partner projects that the organisation leads
- Integrate the administrative, budgetary and HR monitoring processes under the platform in order to be able to more easily link them to ANIMA's activities and project partners (projects, internal activities, etc.)

Project partners will also have access to the platform, their use being limited to project management functions in their capacity as partners.

## Main objectives of the platform

The project management platform will aim to:

1. Centralise practical information for project consortia partners on technical and financial management rules, project documents, action plan, budgets, contacts... (resource centre function)
2. To act as an interface between the project leader and the partners by becoming the privileged place of exchange through which information, documents and deliverables pass (communication channel function)
3. Ensure a more detailed technical steering of ANIMA's projects, by offering more visibility on the implementation of activities, the achievement of objectives, etc. (technical dashboard function)
4. Ensure more fluid financial management of projects, by integrating a system for reporting the expenses of each partner (financial reporting function)

5. Facilitate the collection of key project data, by integrating a system for reporting indicators to partners (impact monitoring function)
6. Plan the allocation of human resources to projects/activities, monitor the time spent by employees (internal and external) on the various projects (HR management function)

## Technical and service needs

### The users

The platform is intended for use by member organizations and project management teams. It is available according to the profile:

- ANIMA :
  - Projects teams
  - Administration and finance teams
  - Management

Access to all functionalities, sharing of content and documents with all or part of the partners, access to the back-office (to be defined according to the above categories)

- Partner organisations: Access to all customised documents shared by the administrator (action plan, budget, etc.)

### Hosting & Maintenance

Hosting must be managed by the platform's development provider and contracted in the name of its company. If possible, ANIMA may consider repatriating the hosting of the platform to a host already associated with ANIMA for other platforms. Like the hosting, the maintenance contract is assigned to the service provider.

An estimate of the hosting costs in proportion to the resources used (size of files and bandwidth used, new modules to be developed, etc.) will be requested from the service provider in order to know the financial needs that will affect the proper functioning of the hosting and the platform.

Maintenance should include a fixed amount of 150 hours of support per year (which can be accumulated)

### Configuration, training and user support

In order to ensure optimal use of the platform by its users, the service provider must undertake to:

- Set up each user account according to its access levels and usage
- Provide documentation and support material for optimal use
- Provide up to two 2-hour hands-on training sessions (delivered in English) for each user organisation

## Current tools and resources

### CRM (Customer Relationship Management)

An event, contact and communication management software is currently used by ANIMA, CIVI CRM. An API gateway will have to be set up between the project management platform and CIVI CRM ANIMA.

## Functional requirements

As mentioned above, the project management platform should be a technical resource centre for those involved in the implementation of the project, centralising all the documents governing the project and its contract.

In addition to this need, there is the need to create an optimal exchange channel between partners to make information available and to pass it on.

The platform must also meet a need for fine-tuned project management by offering optimal visibility on the proper implementation of its action plan in relation to its execution period, so as to anticipate any delays and/or need for change or reorientation in its intervention logic.

In order to facilitate the coordination of the leader with the partners on the financial plans and to ensure an optimal management of the project budget, the platform will have to allow to report the expenses incurred by each partner as well as the time spent on the project by the collaborators of each organisation working on it.

Finally, the platform should enable each organisation to report on the achievement of the project's performance and impact indicators as the project is implemented.

The platform is therefore intended to become the single, daily dashboard for internal project partner organisations and must therefore be very easy to use.

### Services or features to be implemented

#### Centralization of resources

1. Directory of project actors (gateway with ANIMA's current CRM developed under DRUPAL in order to import information concerning project contacts into this CRM). More details on the information concerned will be communicated to you later.
2. Creation of a resource centre (contracts, guidelines, reports, studies, etc.)

#### Consortium coordination

3. Log in for each partner and reserved spaces according to rights
4. Internal messaging service between partner organisations (instant messaging/chat)
5. Shared action plan and calendar of events (common agenda for all partners using the platform)
6. Work package system, activity, tasks to be assigned to users
7. System for uploading documents (studies, deliverables, etc.) to the tool and configurable validation circuit with notification

#### Technical steering dashboard

8. Home page with updated key data on the project (depending on the monitoring)

9. Archiving of previous versions of the budget and action plans with tracking of changes throughout the life of the project

#### **Resource planning and monitoring**

Any action by partner organisations in terms of planning, monitoring and consumption will have to be integrated into a validation circuit by ANIMA.

10. Budgets and HR resource planning loaded on the tool by partners
11. Management of employee timesheets and invoicing of project partner organisations' staff
12. Project budget monitoring with entry of expenses by each partner organisation in the platform
13. Export function of budget consumption data
14. data to Excel formats
15. Import of supporting documents for expenditure
16. Monitoring of pre-financing (advances and grant payments) to partner organisations and payment request forms

#### **Monitoring and Reporting**

17. Monitoring space shared between users to track the achievement of results and impact indicators (based on the indicators defined by the project's logical framework)
18. Reporting for each activity allowing direct loading of the programme of events, list of participants, activity report...
19. Data export function in word and excel formats (graphic representations of these data could also be developed). These data could be used to feed the home page of the platform and be highlighted to provide information on the progress of the project (see dashboard).

## UI design, UX and graphic charter

### Browsing, UI design et User Experience (UX)

Navigation on the platform must be intuitive, fluid and efficient as the platform will be used daily for several hours a day.

The graphic design must comply with the ANIMA graphic charter, as well as with the visibility and communication rules for cooperation projects financed by the European Union.

### ANIMA Graphic charter

The ANIMA graphic charter will be provided to the chosen service provider.

### Visibility and communication rules for cooperation projects co-financed by the European Union.

The visibility and communication rules imposed by the donors and co-financiers of ANIMA projects must be respected. This implies the presence of the funders' logos on the platform, the mandatory mentions and the disclaimer. ANIMA undertakes to communicate these visibility standards of the funding bodies, as well as to transmit the material necessary to comply with the visibility rules.

### Technical compatibility (reminder)

The platform will be optimised to be visible in all web browsers (Internet Explorer, Firefox, Chrome, Safari, etc.), all versions, all operating systems, as well as on mobile devices (mobile phones, tablets, etc.): provide a "responsive design" version of the platform with the latest standards in force.

### Graphics

The service provider must provide at least three design proposals. ANIMA will select one of them.

Once the choice has been made, the service provider must provide a graphic charter for the platform.

### Translation

The platform should be developed in French and English.

## Hosting and domain name

### Domain name

The information required by the service provider will be supplied by ANIMA.

### Hosting

In the event that the tool is not previously developed and hosted, the service provider must ensure that the hosting meets the needs expressed in these specifications or find an additional solution if necessary (SAS, etc.).

In this case, the hosting must imperatively be in the name of ANIMA.

An estimate of the hosting costs in proportion to the resources used (size of files and bandwidth used, new modules to be developed, etc.) will be requested from the service provider in order to know the



financial needs that will affect the sustainability of the future platform (once the subsidised period is over).

### **GDPR and data protection**

The platform will have to comply with the law on personal data protection.

### **Intellectual Property**

All content elements of the platform (images, texts, documents, computer codes developed, etc.) shall be the exclusive property of ANIMA Investment Network.

### **Maintenance**

The maintenance of the platform must also be included in the development service detailed above by the service provider, between the launch and the end of 2026.

Financial and technical details on the maintenance proposal should be specified in the proposed service.

### **Training and creation of user materials**

The service provider will train the ANIMA team, as well as the staff of the partner organisations, in the use of its tool. Several formats will be targeted:

- Provision of training documentation (instructions for use) for users
- Organisation of user training sessions in the project partner organisations

## Selection procedure and expected offer

### Timetable and deadlines for the selection procedure

**Development schedule of the project management platform – non-exhaustive list.**

Competitive bidding - search for a service provider	From 12 August to 19 September 2022
Analysis of the offers received, request for additional information or optimized offers and selection of a provider	From 20 September to 26 September 2022
Contractualisation with the provider	3 October 2022 at the latest
Demonstration of the tool covering the needs and functionalities of this specification	Mid-October 2022
Validation by ANIMA of the proposed version	End October 2022
User training	End October 2022
Commissioning and use of the platform	Mid-November 2022

### Eligibility criteria and expected offer

Eligible are providers established in a country eligible in the framework of the Euromed Clusters Forward project according to the nationality rules applicable to EU funded projects. See list of eligible countries (annex 1 of the specifications).

In support of their offer, applicants must submit a file consisting of the following documents

- A technical offer including in particular :
  - A demonstration of the platform or illustration or an equivalent work
  - A detailed timeline
  - A brief presentation of the technical team
- A detailed financial offer;
- Proof of registration in the national register of the country where the service provider is registered;
- Certificate of regularity of social security contributions up to date;
- Certificate of regularity of tax contributions up to date.

### Selection criteria

The evaluation of eligible bids will be based on the following criteria:

Criteria for assessing the quality of the tender	Maximum number of points
Criterion 1: The technical proposal	40
Criterion 2: Experience and references on similar graphic and technical developments	20

Criterion 3 : Price	<b>40</b>
<b>TOTAL</b>	<b>100</b>

## Response times and contact

**Tenders must be sent by e-mail before midnight on 19 September 2022 to [mathias.fillon@anima.coop](mailto:mathias.fillon@anima.coop)**

Applicants have the possibility to ask questions on technical or administrative points of the file until the submission date by email only.

The answers are given publicly via the shared document accessible at this [link](#). All potential candidates for this consultation can therefore see the answers given to the question asked by another candidate.

### Contact:

Mathias Fillon, Directeur technique - ANIMA Investment Network

[mathias.fillon@anima.coop](mailto:mathias.fillon@anima.coop)

## **Annex 1: Eligible countries**

### **Nationality requirements**

The applicant must be established in a Member State of the European Union or in one of the Southern Mediterranean Partner Countries (Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia), or in a country benefiting from an Instrument for Pre-Accession Assistance established by Council Regulation (EC) No 1085/2006 (IPA) or a Member State of the European Economic Area (EEA).