

Call for Tender

Contracting authority:
EU-Japan Centre for Industrial Cooperation (EUJCIC)

Procurement name:
Request for an audit/diagnostic of the EU-Japan Centre's current IT infrastructure, aiming to setup an integrated and unified CRM/dashboard/database solution

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| Procurement reference number | T6.2-WP6-24 |
| Type of procurement procedure | Call for tender |
| Code name | CRM/IT audit |
| Type of procurement contract | Services contract |

Terms of Reference:

In response to this call for tender, interested parties are required to submit a written proposal for the conduct of the audit/diagnostic of the EU-Japan Centre's current IT infrastructure as per the below requirements. All clarification questions must be received on 21 August 2024 at latest and written proposals must be received on **23 August 2024 at latest** by email at applications@eu-japan.eu with "CRM/IT audit proposal – your company name" as format in the email subject.

Contact:

EU-Japan Centre for Industrial Cooperation

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BACKGROUND

The EU-Japan Centre for Industrial Cooperation (EUJCIC) is a joint venture established in 1987 by the European Commission (DG GROW) and the Japanese Government (METI) for promoting all forms of industrial, trade and investment cooperation between the EU and Japan. It is jointly funded and managed by both sides. Around 25 staff members work at the Centre's head office in Tokyo and 15 staff members at its European office in Brussels. Activities and tasks covered by this Call for Tender are implemented in the context of an EU funding grant agreement.

This Call for Tender is for EUJCIC to identify, assess and select a suitable supplier to conduct a **diagnostic on its current systems and propose solutions**, with a strong degree of integration, to cover the needs of both of the Centre's offices in terms of **Customer Relationship Management (CRM) system, database(s) and dashboard(s)** for EU-funded activities. EUJCIC does not aim to implement a fully-customised IT solution and is seeking a comparative analysis enabling the selection of the most suited **off-the-shelf solution** allowing a fair level of customisation and supporting **EU-funded project cycle processes**. The solution should be able to support users who make use of **Japanese and English** in their daily work and data in both languages would be present in the system. The Centre currently makes use of Filemaker in its Brussels office and a mix of solutions including Salesforce in its Tokyo Office.

Using the conclusions of the diagnostic as a key piece of information, the Centre would then move to the next phase of its project and seek suppliers to work on the implementation of a selected solution across its Tokyo and Brussels offices.

OBJECTIVES

As per the background information provided, an off-the-shelf solution allowing a reasonable level of customisation and contributing to EU-funded project processes (mainly reporting, monitoring and implementation) and Japanese and English is sought.

The diagnostic should assess the best IT solutions to meet the minimum objectives specified below and during your analytical work. To understand the internal needs and carry out the diagnostic, EUJCIC foresaw that at minimum the expert/staff carrying out the diagnostic would need to have online or face-to-face meetings with the below EUJCIC staff:

- At least 2 persons representing higher level management (including in Tokyo).
- At least 2 persons representing reporting to a granting authority (1 person in Brussels, 1 person in Tokyo).
- At least 5 persons representing programmes and relevant databases (in Brussels/Tokyo).
- At least 2 persons representing financials (1 person in Brussels, 1 person in Tokyo).

CRM:

Global objective: setup a new integrated Customer Relationship Management (CRM) System covering both offices of the Centre and all EU-funded programmes of the Centre to ensure a systematic and structured monitoring and follow-up of the Centre's customers.

This would help the Centre to:

- Manage efficiently interactions and relationships with its existing customers but also potential new customers.
- Have an organised view of the Centre's customers across projects, activities and offices to be able to see directly all key interactions that a customer or potential customer already had with the Centre.
- Get a better understanding of our customers' needs and behaviour, thus helping us to build stronger relationships with them.
- Being able to segment and target our customers and potential customers. The CRM data should help us generate leads and eventually partnership agreements.
- Be able to identify 'loyal' or frequent customers, or identify and address issues that lead to customer dissatisfaction.
- Embed workflows related to the monitoring and follow-up of potential and existing customers in order to support programme managers in their daily operations.
- Streamline processes and increase efficiency.

Dashboards:

Global objective: to establish dashboards to provide immediate visibility on key items and figures to the upper management of the Centre, all programme managers and officers, coupled with the possibility to export this data.

This would entail the below:

- Provide the directors in Tokyo and Brussels with a management dashboard showing the main indicators and items related to the execution of the Centre's work programme. This would include for instance financial data per cost category, KPI targets and the timeline/state of execution of key items such as milestones per work package/task.
- Each programme manager would have a dashboard of the activity they are responsible for.
- Each user should be able to get latest data updates via the dashboard. This would ensure that all staff members are working with the most recent data and take the same information as reference.
- Staff would be able to enter and export data to support monitoring and reporting to the EU granting authority.
- To favour a simple interface as the dashboard should be easy to use and navigate, even for non-technical users.
- In terms of accessibility, the dashboard should be accessible from multiple devices, including mobile devices.
- In terms of data visualisation, the dashboard could include graphs and charts to make data easier to understand. For instance, it could regroup KPI sets for each programme and their level of completion as well as the level of budget consumption and budget figure available per programme.
- Ideally, the dashboard should be customisable to provide the information that is most relevant to each manager.

Databases:

Global objective: as a collateral impact, existing databases will have to be reviewed to serve the purposes of the CRM tool and dashboards. The objective will be to **integrate or interconnect the different contact databases** that different programmes of the Centre use in Japan and Europe.

DELIVERABLES

At the end of the audit/diagnostic, the following would be delivered to EUJIC:

- Report with **key findings, facts** and recommendations including based on meetings with EUJIC staff.
- **As-is and To-be diagnostic**, incorporating process mappings/data flow diagrams, key facts and assumptions as appropriate and considering key elements including:
 - different systems in place, their maintenance and related providers and which programmes and staff use them.
 - gaps and overlaps in current systems in place as well as future needs (next couple of years).
 - data types/groups, data fields and their related data processing/sharing restrictions, in particular in relations to the separation of the Centre's funding sources (some programmes are funded by an EU granting authority, some by a Japanese authority and some are jointly funded) and in relations to data controllership (consultants/external partners may implement part of the activities). The diagnostic should map which datasets/groups can be migrated or not.

- **Mapping of possible options for the solution**, with ideally a minimum of 3 options compared and incorporating for each option at least the below:
 - the (current or future) provider(s) and system(s) involved.
 - technical facts, feasibility and pre-requisites including in terms of data migration.
 - feasibility in terms of data privacy/protection and IPR requirements.
 - estimates in terms of the minimum implementation time, as well as minimum monetary and man effort investment required on the short and long term to implement and maintain the solution.
 - the level of autonomy of power users vs supplier reliance to calibrate system items.
 - their respective advantages and drawbacks for general elements (e.g. user friendliness, scalability, security).

ELIGIBILITY

- The entity applying should be officially registered in the European Union or a European [country associated with the Single Market Programme, SME Pillar](#), or in Japan and the supplier's staff involved in the audit should be based in one of those countries, preferably Japan or Belgium.
- The entity applying should be in capacity to perform the tasks (e.g. not in a situation of insolvency/bankruptcy).
- All applicants should be free from conflicts of interest and agree to sign a related declaration if required to do so.

SUBMISSION

Your proposal would please need to include the below:

- Legal and key applicable details of your entity including physical address, name of legal representative, contact details, VAT details, registration number and website address.
- Table of contents.
- Short background of your company/entity.
- Proofs/details of experience:
 - in carrying out similar diagnostics/audits at company and/or available staff level.
 - any experience in working with entities based in Japan at company and/or available staff level.
 - any experience in data protection issues at company and/or available staff level.
 - CV(s) of the expert(s)/staff member(s) who would perform the diagnostics/audit should the contract be awarded.
- Details of the methodology to be used and proposed level of detail/layers of the analysis.
- Proposed planning/timeline for the key stages of the diagnostic including estimated time required to carry out meetings with EUJCIC staff and considering EUJCIC's general timeline (see below). Please also include details on the availability of staff.
- Quote in euros with detailed fee/budget breakdown including time effort, any applicable travel budget or taxes and a proposed payment schedule. Additional optional expenses

to consider should please be included. The budget should not exceed € 13,000 all included.

- Any other element considered to significantly influence the scope, complexity/depth, budget, timeline or results of the audit/diagnostic.
- Written in English.

Please send your clarification questions on 21 August 2024 at latest and proposals on **23 August 2024** to applications@eu-japan.eu with “CRM/IT audit proposal – your company name” as format in the email subject. Thank you!

SELECTION

Eligible applications will be assessed according to best value for money principles by an evaluation committee composed of staff members of the two EUJCIC offices (Brussels, Tokyo) as per the below criteria:

- General quality of the document (document clarity, provision of requested background details).
- Proofs/details of experience (references to similar audits, international/Japan experience, data protection experience, staff CVs).
- Proposed framework (quality of methodology, scope, proposed planning/timeline, availability of resources).
- Price and financials.

TIMELINE

In order to deliver its overall project (diagnostic plus system implementation) within its current EU grant agreement timeframe the below timeline is foreseen:

- Deadline for clarification questions: 21 August 2024 at 23:59 CEST.
- Deadline for proposals: 23 August 2024 at 23:59 CEST.
- Delivery of diagnostic/audit: the audit results with the appropriate quality level and all its elements is expected to be delivered to EUJCIC on 17 November 2024.

OTHER INFORMATION

- EUJCIC reserves itself the right to select no application if none meet the required eligibility and selection criteria.
- No fee would be paid for time spent on applying to this tender.