

# Request for Proposal

IT integrated system  
January 2022, Palaiseau

# Summary

<b>IT integrated system</b> .....	<b>1</b>
1. Context .....	3
2. Glossary .....	3
3. Organization .....	4
4. As is and risks.....	6
5. Scope and objectives .....	7
6. Initial assessment .....	8
7. Expected Project Timeline .....	9
8. Additional information.....	10
9. Answer to the Request for proposal .....	10
Appendices .....	12
A. Appendix 1 – MDD .....	13
B. Appendix 2 – Access rights and role of users .....	15
C. Appendix 3 – Grant Cycle Scheme .....	17
D. Appendix 4 – Definition per module .....	18
E. Appendix 5 – Target Architecture .....	21

## 1. Context

EIT Manufacturing (KIC) is focused on promoting entrepreneurship, innovation, and education in the domain of Manufacturing. EIT Manufacturing brings together leading organisations along the entire value chain from smaller companies to larger industry, excellent academic and research institutions, as well as public sector organisations, to promote the transformation of manufacturing towards the digital economy, towards the circular economy and the decarbonization of industry, by removing barriers to innovation, promoting talent and education, leveraging enabling technologies and exploiting bigdata.

Among Europe it exists 8 other KICs with the one we can participate to lead the action and create services across Europe and improve the competitiveness of European companies.

EIT Manufacturing is an association under the law 1901 created in 2019, with 6 active subsidiaries within Europe and is now looking for an effective IT integrated system to optimize, secure and uniformized its business processes.

The integrated IT system will have to address the operational internal needs of EIT Manufacturing as a Group, taking into consideration the local constraints. In addition, this IT integrated system will also have to address the needs of the Community (Partnership) to be able to manage the projects we are funding and supporting.

## 2. Glossary

**KIC LE:** Parent entity, EIT Manufacturing Association under law 1901. In charge of the coordination of the Grant among the partnership.

**Partnership:** Organizations that are part of EIT Manufacturing Community by subscribing a membership fee, yearly subscription. Different type of partners within the Partnership.

**CLC:** Colocation Center, legal entity in Europe to develop the activities locally, they can have local projects. Deploy the strategy of the pillar and manage the local eco-system.

**Manufacturing SASU:** Commercial entity in charge of managing the revenues stream and ensure the financial viability of the Group.

**Financial Sustainability:** Mechanism of revenues developed to ensure the financial viability of the whole organization. Mechanism held under KIC LE and Manufacturing SASU.

**EIT:** Regulatory body attached to the European Commission

**Grant Agreement:** Contractual agreement signed between EIT and EIT Manufacturing with the financial provisions (funding) available. Yearly agreement.

**Partnership Agreement:** Framework agreement between EIT and EIT Manufacturing to be part of the Horizon Europe program. Multiyear programme.

**Horizon Europe:** European Program supporting Innovation within Europe.

**KAVA:** KIC Added Value Activity, project code (5 digits). The project code is attributed at the proposal stage.

**Call:** Project selected in the context of an open call for proposals.

**Non-call:** Project owned by KIC LE with internal selections of participants, or only within the EIT Manufacturing Group.

**Business Plan:** Document submitted to EIT, over 3 years including financial and non-financial information.

**Budget:** Financial data submitted to EIT for one calendar year (Jan-Dec).

**Amended Budget:** Financial data updated for EIT at midyear.

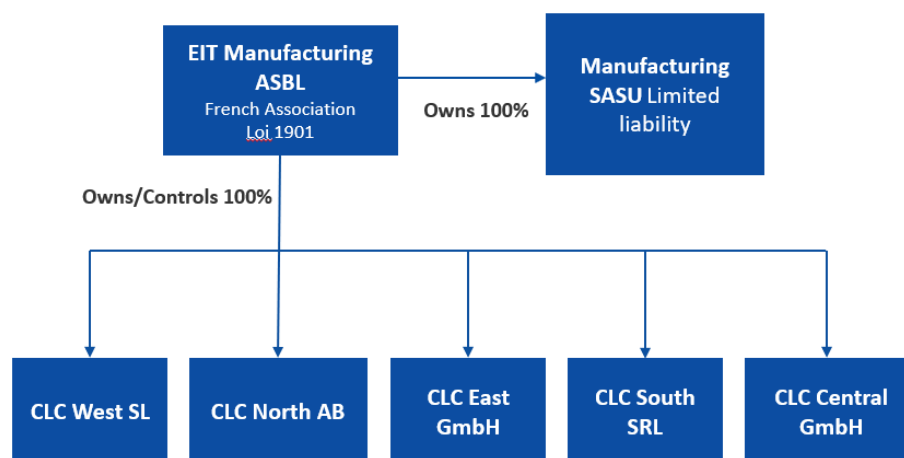
**Funding:** Grant allocated by EIT to KIC LE.

**Co-funding:** Other sources of revenues/financing.

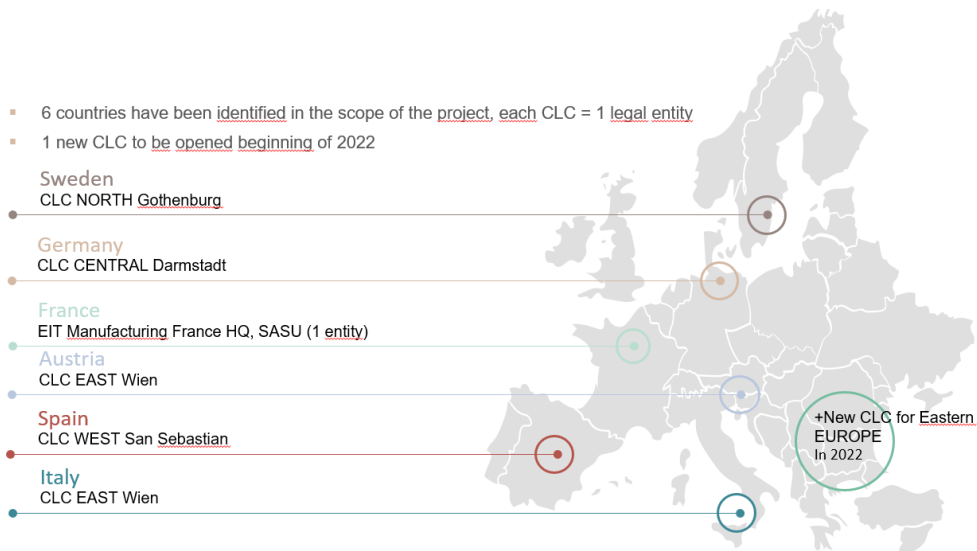
**Pillars:** Similar to a line of business: Education, Business Creation, Innovation, RIS (Regional Innovation Scheme) >> Define the strategy at Group level (matrix organization).

### 3. Organization

Today, each affiliates have its own ways of doing business processes. An integrated IT system might be the solution for EIT Manufacturing to support all business functions of France and all different affiliates (Spain, Sweden, Italy...) based on a Core Model with a common framework and processes shared within a unique solution.



Geographical coverage



A matrix organization

		Activities							
		Education	Innovation	Business Creation	RIS Regional Innovation Scheme	HEI Higher education initiative	Management	Cross-KIC Knowledge innovation community	Communication
Legal entities	EITM HQ								
	CLC North								
	CLC West								
	CLC Central								
	CLC South								
	CLC East								
	Manufacturing SASU								

## 4. As is and risks

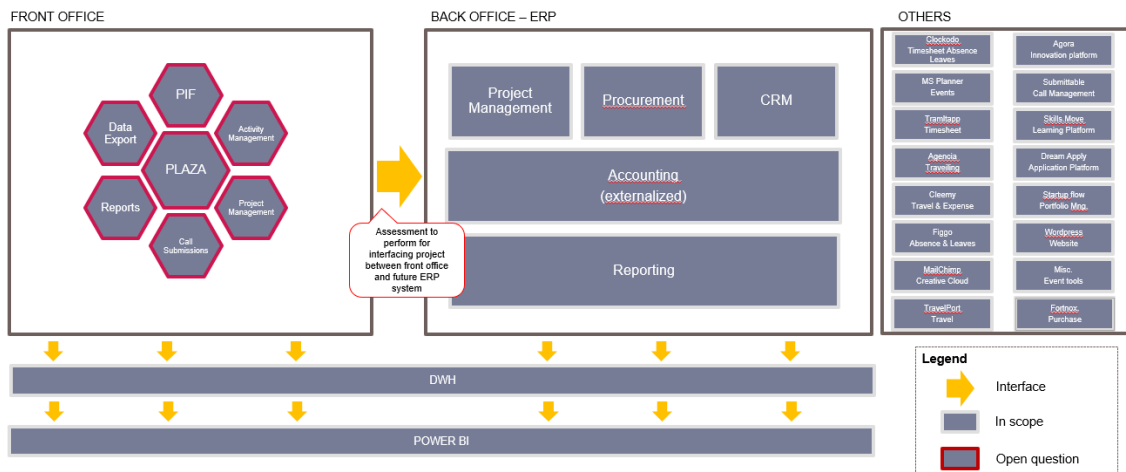
As of today, there is only one system commonly used within EIT Manufacturing: Plaza. It is a web interface grouping the following features:

- Open interface (front office) to display information and store documentation useful for our external partners and our employees;
- Information on external organization (name, legal info, status, entry date etc);
- Proposals created during the Open Call for Proposals;
- The activities selected and the people participating: information about projects and about the budget;
- Intermediary and final report (financial and non-financial information);
- Contract storage for the main agreements signed per partner;
- Extract of data to be submitted under the right format to the regulator.

This tool relies on a relationship data model and has been developed over 10 years to cover the needs of similar companies, nevertheless this data model has not been optimized nor developed taking into consideration internal needs. As the development is not only specific to our entity the data model is quite unstable and not fitting our specific needs. In addition, the interface is not user friendly and has already raised complaints from internal and external users.

The future tool will have to cover at least the scope of this existing platform and adding the historization and audit trail features that are a must for our organization.

The scheme below summarizes the existing IT systems **within the Group**:



PowerBI has been set up in September 2021 to ease the access of data for our internal users, this preliminary work has also allowed more documentation about the data model in place.

Nevertheless, the following risks remain:

- Business processes not unified
- Data redundancy, accuracy and quality
- Lack of communication and knowledge
- Human mistakes (absence of automation and automatic controls)

## 5. Scope and objectives

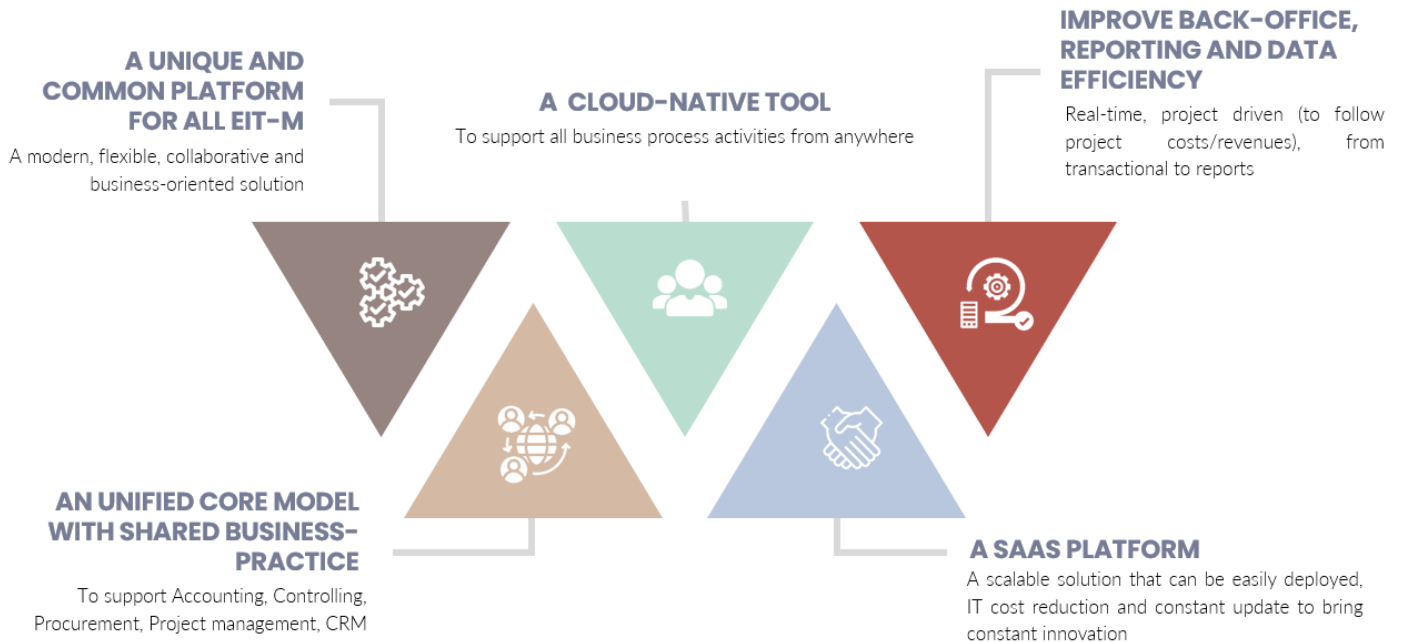
Within the scope of the future tool, following features have been already identified:

- **CRM** (Customer relationship management): To recognize, assess and transform leads within contracts;
- **PM** (Project Management): To help the organization achieve optimal efficiency and transparency in its management of projects;
- **Accounting / Controlling**: Management a shared Chart of Accounts and same analytical key (for Profit / Non-profit sector, cost center, internal orders...) and different reports shared by all affiliates;
- **Procurement / Contract management**: Management of Purchase order and Contract and revenue recognition with electronic scanning of contracts (nice to have) and validation workflows embedded;
- **Sales / Contract Management**: being able to manage our revenue streams and related agreements.

The new tool shall be cloud-native, preferably only French servers or mandatorily only European.

The main objectives are as follow:

- **Process optimization** - Optimize the closing process and improve business planning processes;
- **Scalability** - Build a consistent and scalable data model to support EIT Manufacturing in the long term;
- **Data security** - Provide with a SAAS and cloud native tool, secure the data and ensure traceability of the data;
- **Collaborative** - Set up a tool that is easy to use and facilitates collaborative work;
- **Maintainability** - Build a business solution that is easy to maintain and evolve;
- **Regulatory requirements** – Fulfil the needs and expectations of our regulation body.



## 6. Initial assessment

The initial assessment has been conducted to better understand the level of maturity and assess the future efforts. It should help to assess the level of change management requested in the answer to this RFP.

In addition to the overview below some points of attention have been identified and will have to be part of the answer provided:

### Point of attention identified:

- Yearly reporting to the regulation body: ability to extract the data and transform as expected by EIT (financial + non-financial information);
- Interfaces open also for external: need to connect the front office and the back office under a unified system;
- Volume of data, granularity at proposal stage not used for internal purposes;
- Future-proof tool to adapt to the future needs and potential changes in the requirements from the regulator;
- Historization and audit trail;
- Consistency checks to be implemented at each stage of the project;
- User friendly interfaces;
- Easy access to data;
- Internal maintenance requested (logs, internal administrative maintenance);
- Highly interoperable system is required.



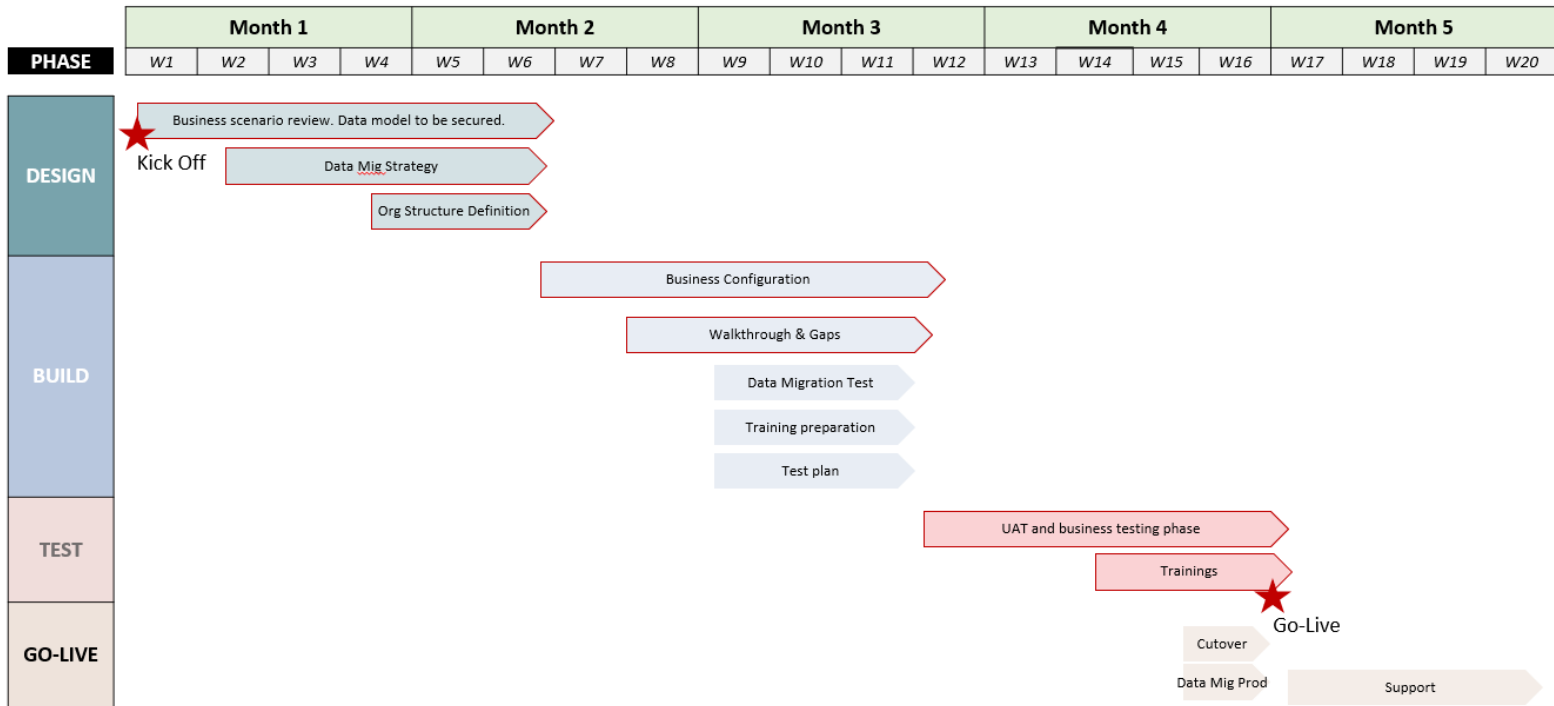
Information System assessment criterion	Assessment grid					Comments
	Very low	Low	Medium	High	Very high	
Functional coverage of existing tools			■			Many tools existing within EIT-M, low common rules for usage (ie : CRM / event tool, Timesheet,...), depends on each CLC
Data model		■				Data model is complete and available for regulatory purposes but is not enough and should be rationalized between CLC
IT architecture		■				Low volume of interface and connection between tool for EIT-M. Lot of reconciliation and closing manual works (excel files, reconciliation with timesheet tool, accounting...)
Connectivity with external solution	■					Plaza is working as a stand-alone tool not connected to any other tools (exception of PowerBI for KPI based reporting)
Scalability		■				Low scalability due to fact that every CLC are working as independent entities with own processes (even though PM with Plaza are supposed to be same rules)
Technical control		■				Depending on Plaza from year to year and best in class approach for IT tool selection, no single platform exist nor global DWH at EIT-M
Deployment in new countries		■				Complexity to open new countries and share knowledge as tools are not Group tools and common business practice are CLC-dependant. No starting nor deployment kit exist as such
Sustainability		■				Lack of documentation of the current solution. People have the knowledge but it is not formalized on proper documentation
Accessibility		■				No single based to record accounting (externalized), shared customers/vendors data based, complexity accessing data as no single source of truth currently in place at EIT-M
Management of access & rights		■				No centralization of access management, low audit tracability of transactions performed in Plaza, system is open but no clear authorization and role matrix
Performance			■			Quantity of transactions within IS tools are not bringing any performance issues

## 7. Expected Project Timeline

The following timeline is expected, and the answer should include and details each phase below. In addition to the answer a dedicated transversal part for the change management should be included.

The project will go with a **minimum of two waves**:

- First wave will be with 2 pilot entities: Manufacturing SASU and the new CLC to be opened in eastern Europe;
- Second wave: the rest of the entities, starting by the parent company.



## 8. Additional information

In the context of being part of a European Program, discussions are currently on-going with other KICs to define the IT strategy. The scope of the discussion is limited to the Grant Cycle but any information that could be useful will also be shared, we need to ensure that the regulation body can get the same granularity of data from all the KICs.

## 9. Answer to the Request for proposal

**Clarification meetings will be organized over January** to clarify all open points. A maximum of 2 hours will be dedicated per proposal submitted. Please note, that no additional document will be provided at this stage.

In February the proposal is expected to be received including a demo of the selected solution(s) and a written answer.

The answer is expected to include as a **minimum the following items:**

- Understanding of the situation;
- Challenge of the proposed architecture and relevant questions and proposals;
- Methodology of the project, including change management;
- Pre-selection of a technology to be implemented (one or several);
- Budget: recurring and one off.

The **support will be provided for:**

- A review of the data model (and data flow) at Group level;
- Detailed specifications per legal entity taking into consideration the matrix approach;
- Implementation of the specifications and development of specific parameters;
- Testing planning and testing phase;
- Training and change management;
- Support post implementation (3-6 months).

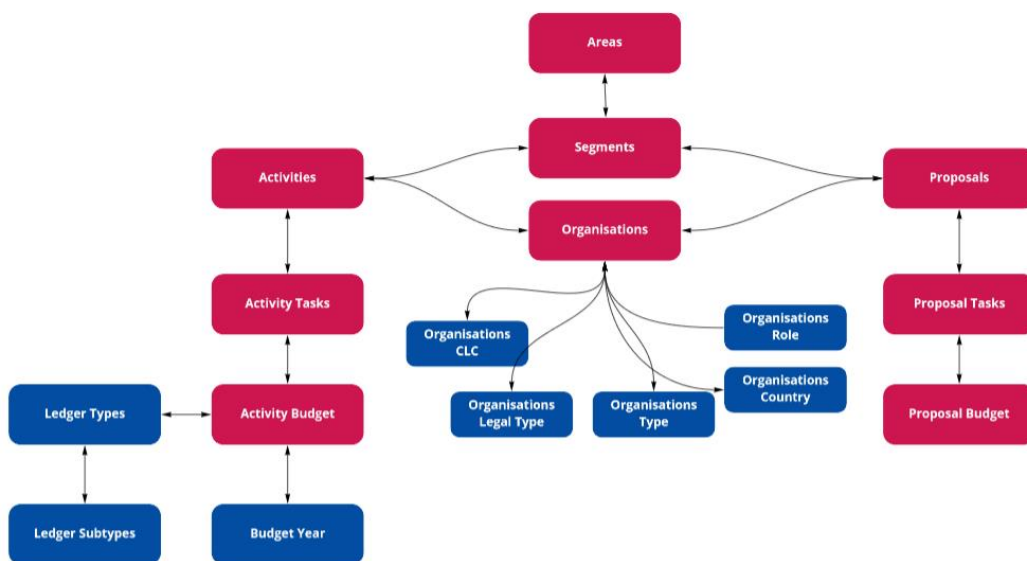
**Resources available on EIT Manufacturing side for the project:**

- IT project officer: 50% of time
- IT Project Manager: 75% of time (arrival planned end of February 2022)

# Appendices

## A. Appendix 1 – MDD

Overview of the current data model implemented in Plaza:





Appendix 1.xlsx

Details are available here:

Annex 1 - MDD	Description
---------------	-------------

Organization	Information to be collected at Organization level	CRM	Each organization / individual should be registered in EIT Manufacturing system in order to be able to follow the interactions within the organization (among geographical area an/or line of business)
Individuals	Information to be collected at Individual level		
Proposal - Call	Information to be collected for project selected in the context of the call	PM	According to the type of project / answer to the different call for proposal the information to be filled are not equals, some specific fields have to be added / deleted
Proposal - Non-Call	Information to be collected for project selected in the context of the non-call		
As is - proposal	Illustrative data model	NA	Current connection between the tables
Selection and rates	Data to be collected, criteria should be adjusted according to the Call	PM	As of today the evaluation is done under excel and then manually sum up to have the full view. This should be integrated and automated
Illustrative rate table	Existing table for illustrative purpose		
Activity editor	Existing fields in the activity editor	PM	Should be reused and available in the PM (collected from the proposal stage)
EDU model	Specific needs of following up students and providing financial support + certificate/diploma	PM	Management of students and interactions with students and universities should be handle as a project with dedicated fields
As is - relational model	Extract of the data model as used now for the purpose of Power BI	NA	

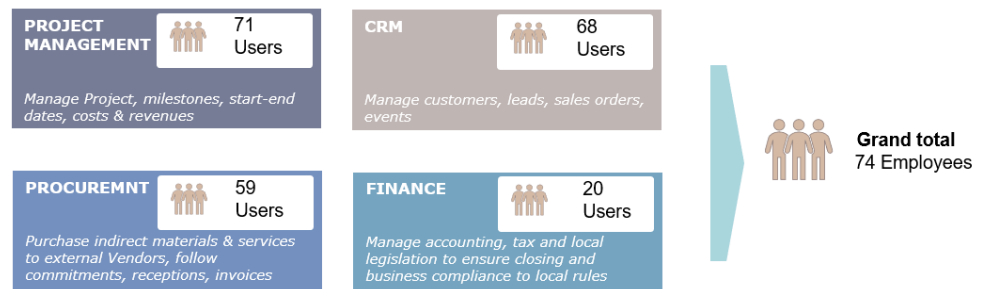
## B. Appendix 2 – Access rights and role of users

The roles expected to be defined in the system are as follow:

Role	PowerBI	Module	int/ext	Restrictions	Comment
Activity Leader	no	PM	ext	limited to activity	
CLC Directors (EIT Manufacturing)	yes	all	int	director of CLC	restriction on CLC info for PM. Access to all in CRM
Pillar Directors	yes	CRM, PM	int	director of pillars	restriction on pillar info
Admin	yes	all	int	all	
Finance profile	yes	finance, procurement, sales	int	restricted to one legal entity	
Project Manager	yes	CRM PM	int	restricted to activities / area	
Manager	yes	Procurement	int	not restricted, but workflow	
PMC	no	CRM, PM	ext	limited to organization	
Finance contact	no	PM	ext	limited to organization	
Legal contact	no	CRM	ext	limited to organization	
Other	no	CRM	ext	limited to organization	
Experts	no	PM - submissions	ext	limited to projects to be reviewed and commented	

Internally the attribution of roles could go as follow :

Internal users : 74 users have been identified on the different functional streams required for EIT-M corresponding to licence numbers :



Regarding the **external resources** with access to our system (CRM and PM) we should expect around 1 500 active users for 2022 and the double within 3 years.

As of today, in Plaza the breakdown is as follow:

TOTAL Active Person in the system	3 315
Total Persons with 5+ logins since Dec 2020	793
Total Persons with 5+ logins since Dec 2020 (from EITM)	78
Total persons assigned to ongoing activities	516

Each of them has access to modify information and get access to the main interface with documents.



## C. Appendix 3 – Grant Cycle Scheme

The Grant cycle is the main operational process follow by all entities within the Group and the line of Business. This common approach has to be strengthened and automate as much as possible to reduce the reporting time.



Appendix 3.xlsx

## D. Appendix 4 – Definition per module








Appendix 4.xlsx






	CRM	Project Management	Procurement	Accounting
Minimum level of information	<ul style="list-style-type: none"> <li>Specific unique ID for each contact entered</li> <li>Organisation / Individual / Student types</li> <li>Member status (member / non member, SME club, Mid size company club)</li> <li>Contacts information (address, mail, phone, VAT/Tax information, PIC number...)</li> <li>Sales contract – Service, Success Fees... (only revenue) – Manufacturing SASU</li> </ul>	<ul style="list-style-type: none"> <li>Unique ID per Project - Project number (KAVA)</li> <li>Project typology (int/ext)</li> <li>Legal entities (one project can be used by several entity)</li> <li>Partner master contact (in CRM)</li> <li>Milestones : Beg. - End dates, phases, budget</li> </ul>	<ul style="list-style-type: none"> <li>Document type (purchase)</li> <li>Project (KAVA)</li> <li>Budget owner (financial delegation workflow)</li> <li>Vendor</li> <li>Catalog service / Product</li> </ul>	<ul style="list-style-type: none"> <li>Legal entity</li> <li>Journal Entry</li> <li>GL Accounts</li> <li>VAT code</li> <li>Ledger (posting group, local)</li> <li>Posting date / Document date</li> <li>Vendor / Customer</li> <li>Project (KAVA)</li> <li>Amounts</li> <li>Currency</li> <li>For profit / Non profit (BS and P&amp;L value mandatory)</li> </ul>
Specific requirements	<ul style="list-style-type: none"> <li>PIC number (specific field, unique per contact) – Only for Organizations</li> <li>Member status (member / non member, SME club, Mid size company club) – Change log to be possible to track historical information</li> <li>Management of documentation upload</li> <li>Comments features (red flag for crisis management)</li> </ul>	<ul style="list-style-type: none"> <li>Specific field for Financing source (EIT funding, private funding, ...) mandatory for all projects</li> <li>Specific field &gt; Responsibilities: Activity leader (Partner) / Project Manager (EIT M internal person)</li> <li>KPI specific list (number of participants, creation of startup, number of partners,...)</li> <li>Project status (project météo, can be a dedicated field)</li> <li>Upload document</li> <li>Free comment fields</li> </ul>	<ul style="list-style-type: none"> <li>One Vendor database for all EIT-M legal entities</li> <li>Validation workflow for indirect purchasing (in K€):</li> </ul> <p>EIT-M HQ rules</p> <p>Level 1. 15k only directors            Level 2. More 15k- below 60k &lt; COO (3 bid offers + audit documentation)            Level 3. &gt;60k – 214k &lt; COO (5 bid offers + audit documentation)            Level 4. &gt;214k – COO + Advisory board (Public offer)</p> <p>CLC rules</p> <p>Level 1. Small amounts - Office manager            Level 2,3,4. High amounts – Depends, Manager, CLC directors, CEO</p>	<ul style="list-style-type: none"> <li>Managed localization for each countries (VAT statement, compliance with local tax and reporting)</li> <li>Accounting is outsourced</li> </ul>

Project (KAVA) is the key analytical dimension to be shared across all functional domains






## CRM

What EIT-M wants tomorrow	What are the current pain points	IT Change impact	Impact on Front-Office
<ul style="list-style-type: none"> <li>A CRM tool for all affiliates to cover basic functions with a user-friendly interface</li> </ul>	<p>→ No group tool exist today within EIT-M. All CLCs are managing their own way of working with CRM. Lack of visibility regarding project &amp; related activities</p>		MEDIUM
<ul style="list-style-type: none"> <li>A unified and shared data base for all EIT-M partners on the model 1 tool, 1 database</li> </ul>	<p>→ Customers are not shared between affiliates which leads to time issues when trying to find the correct information, feedbacks and activities</p>		
<ul style="list-style-type: none"> <li>A sustainable &amp; future-proof tool (marketing campaign, sales ..)</li> </ul>	<p>→ EIT-M business is growing and sales is an activity that will be developed in coming months. It is required to have a solid tool to absorb this growth and activate new CRM functionality without complexity</p>		
<ul style="list-style-type: none"> <li>Should include a 360° vision of business with a native audit trail embedded</li> </ul>	<p>→ No vision of activities currently done with customers across the legal entities. No audit trail to check what information has been changed on customer information, what is the track record and no native controls</p>		
<ul style="list-style-type: none"> <li>An integrated tool with Project Management</li> </ul>	<p>→ Follow-up is required for Partner contact, Partner activities and also natively connected to projects with easy reporting and dashboards as these information takes time to retrieve from an operational point of view</p>		






## PROJECT MANAGEMENT

What EIT-M wants tomorrow	What are the current pain points	IT Change impact	Impact on Front-Office
<ul style="list-style-type: none"> <li>A tool to follow-up of projects at all levels (internal / external) and for all project source (in Plaza / Excel)</li> </ul>	<p>→ Plaza tool is not convenient and does not integrate all projects (only the ones submitted to EIT regulator) which provide not a full vision of business</p>		HIGH
<ul style="list-style-type: none"> <li>A management tool to track budget, timeline, tasks associated for progress and completion related to projects</li> </ul>	<p>→ There are several known issues regarding Plaza tool which is difficult to use to monitor and track activities and project KPIs. Information and reports are not fully compliant with users to understand and make decision process easy</p>		
<ul style="list-style-type: none"> <li>It must contain the correct level of granularity to follow-up history and project lifecycle</li> </ul>	<p>→ Too many information are provided in Plaza tool but not all of them are correctly monitored nor pertinent for business. It brings operational issues for CLC's and lots of time efforts to find accurate data and modification</p>		
<ul style="list-style-type: none"> <li>EIT-M wants an easy and user friendly tool with native control embedded</li> </ul>	<p>→ Data in Plaza is not structured enough and there are lots of database and tables to aggregate to find information. It must be changed as this tool is not seen by business as a sustainable tool with EIT-M future growth</p>		
<ul style="list-style-type: none"> <li>A tool to bring more coordination between legal entities</li> </ul>	<p>→ Due to enlisted pain points, it is difficult to bring and fluidize co-work between CLC's</p>		

## PROCUREMENT

What EIT-M wants tomorrow	What are the current pain points	IT Change impact	Impact on Front-Office
<ul style="list-style-type: none"> <li>A tool with procurement functionality to allow tracking of indirect purchases</li> </ul>	<ul style="list-style-type: none"> <li>No P2P tool exist within EIT. Most tasks related to purchases are managed manually (by emails or by Excel file) which costs EIT-M in terms of follow-up and accurate vision of expenditures</li> </ul>		LOW
<ul style="list-style-type: none"> <li>A tool must allow to follow expenses liable to projects (KAVA)</li> </ul>	<ul style="list-style-type: none"> <li>All procurement purchases are posted against a project and are today followed in accounting on this analytical dimension but again this is manual work (human mistake). Change to have the information stored at Purchase order</li> </ul>		
<ul style="list-style-type: none"> <li>It should be harmonized within one single data base containing all Vendors and shared by all EIT-M affiliates with a good level of quality controls</li> </ul>	<ul style="list-style-type: none"> <li>There is no common data base for Vendors. Each CLCs is working with their own Suppliers, listing, sourcing, price list which takes time for local business when coming to procurement. Controls when recording Vendors required.</li> </ul>		
<ul style="list-style-type: none"> <li>Future procurement tool must respect each local purchase policy when it comes to validation workflow and associated financial delegation</li> </ul>	<ul style="list-style-type: none"> <li>Validation workflow are all managed locally depending on different threshold but are not automated. It's all paper work and done via emails which is not work-efficient</li> </ul>		
<ul style="list-style-type: none"> <li>Audit trail to be in place to drill down from Purchase order to Project, accounting postings</li> </ul>	<ul style="list-style-type: none"> <li>No possibility today to match and analyse CAPEX/OPEX purchases (good receipt, invoice receipt) electronically easily from Purchase order to accounting posting</li> </ul>		

## FINANCE

What EIT-M wants tomorrow	What are the current pain points	IT Change impact	Impact on Front-Office
<ul style="list-style-type: none"> <li>An ERP to answer to statutory reporting of existing legal entity – accounting is managed externally in each country</li> </ul>	<ul style="list-style-type: none"> <li>No group tool exist which brings analytical and closing issues. A unified ERP system to manage languages from different legal entities and comply with local regulatory rules for reporting is required to tackle this point</li> </ul>		LOW
<ul style="list-style-type: none"> <li>A shared view of accounting results between EIT-M legal entities</li> </ul>	<ul style="list-style-type: none"> <li>Today there is no direct view of accounting for EIT-M. Accounting is managed externally for each CLCs and no tool exist to . All consolidation and reporting are done manually via Excel and time consuming retreatments</li> </ul>		
<ul style="list-style-type: none"> <li>A real-time access to data and a <u>gist</u> of audit and traceability of accounting postings</li> </ul>	<ul style="list-style-type: none"> <li>No direct access to CLCs' BS, P&amp;L nor cross-entity vision in real-time nor audit trail (drill down) currently exist. System must allow this. This point is to mitigate with the will of EIT-M to keep accounting externalized for now</li> </ul>		
<ul style="list-style-type: none"> <li>Make the reporting easier and share one single source of truth for accounting with access to reports</li> </ul>	<ul style="list-style-type: none"> <li>Data not centralized in one place. The data model is the same between CLCs. The new ERP system must allow standard reporting based on EIT-M accounting key (GL account, Project, LoB) natively/</li> </ul>		
<ul style="list-style-type: none"> <li>Spend less time on the analysis and aggregation of data and more on the decision taking with an automated and centralized ERP tool</li> </ul>	<ul style="list-style-type: none"> <li>Business need to focus on high-value added tasks and spend less time on aggregating and crunching data</li> </ul>		

## E. Appendix 5 – Target Architecture

