

Request for Proposals

Document Management System

September 2022, France

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 9 other KICs with the one we can participate to lead the action, create services across Europe, and improve the competitiveness of European companies.

EIT Manufacturing is an association under the law 1901 created in 2019, looking for an integrated solution to manage our documents. EIT Manufacturing has developed its business with two main streamlines: services oriented and grant management. The second business line (grant management) requires specific functionalities from a document management system to allow EIT Manufacturing to organize and control properly its processes.

2. Description

EIT Manufacturing will start operating with NetSuite from 2023, in order to secure and improve its document management, EIT Manufacturing is looking for an **add-on to be plugged to NetSuite** in order to:

- Store and classify the documents per type
- Organize the documents per process
- Approve or reject the documents uploaded
- Comment and add customs information per document or type of documents (grouping documents per type and attributing them some specific information)

EIT Manufacturing is **currently using SharePoint** as the main storage space, a dedicated SharePoint site will be created to store the information from NetSuite. Nevertheless, EIT Manufacturing remains open if the

tenderer would advise a different solution for the storage. In case the tenderer would suggest another storage solution, then EIT Manufacturing expects the tenderer to take care about the implementation and to include it into its financial offer.

Illustrative example of one of our processes:

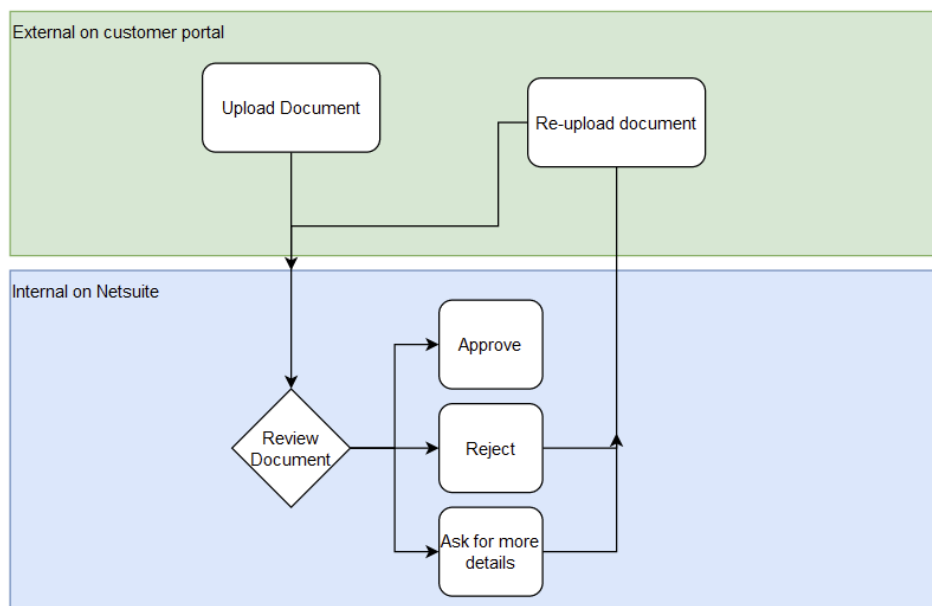
We expect external organizations with an access to the Customer portal of NetSuite to be able to upload documents. Documents can be uploaded to any records (custom or not) that exist in NetSuite.

Once the documents are uploaded, a notification should be available in the dashboard of NetSuite to inform about new document(s) to be approved.

The document(s) can be viewed, downloaded, a general comment can be added to the file and the approval/rejection/request for change can be done.

On the customer portal the document will always be accessible from the external customer and a notification will inform if the document is approved/rejected/requested for changes.

If the document is not approved, the external will be informed about this automatically, he will need to upload an updated version of the file taking in consideration the comments from the approver. The previous version of the file will remain on the storage space but will be locked (no modification nor deletion allowed).



The three statuses of the workflow should be:

- **Approved:** the file is approved and cannot be changed nor deleted;
- **Rejected:** the file should be replaced in the customer portal and re-submitted for approval;
- **Requested to change:** file should be modified and re-submitted for approval as per the comments added in the comment field.

Functionalities

- Versioning, EIT Manufacturing needs to keep track on the documents (how many times was it uploaded, accessibility to previous version when requested, approved version is locked)
- Date and historical info: who has uploaded, when, who has approved/rejected
- Comments can be added when approving / rejecting or requesting more details
- Notification should be available when a new document has been uploaded, the notification should be available in the homepage (dashboard of NetSuite) with the new documents submitted, the number of approved ones and the number of rejected ones
- Documents can be uploaded for any records (including custom records) defined in NetSuite
- The Administrator of NetSuite can create link to upload documents for a set of records and can manage it by batch (not one by one)

Types of files available for upload	<ul style="list-style-type: none"> • .pdf • .xlsx • .docx • .rar/zip • Audio Files • Video Files • .xml • .pptx
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Evolutivity

The Document management system should be:

- Easy to maintain, no external resources should be requested to maintain it with time;
- Able to offer more collaborative functionalities (including the external users to also approved or reject documents);
- Possible to link with more than one storage system (not limited to sharepoint).

3. Deliverables

The tenderers to this request for proposals should provide to EIT Manufacturing:

- A comprehensive demonstration, including and not limited to:
 - The integration to NetSuite
 - The workflow of approval
 - The upload and re-upload from the customer portal (customer role)
 - The upload and re-upload within NetSuite for the accounting entries and procure to pay process
 - The tracking of changes on the document
 - Dashboard where we can see all documents per type with possibility of filtering to analyse the status
 - Possibility to add some specific custom fields / attributes per document and or group of documents

- A financial offer indicating the one-off cost for the implementation and the recurring costs per year. The pricing proposed should commit to maintain the same price for the next 3 years.

- A presentation of the solution and a description of the one-off implementation costs. The solution should be maintained internally, and the provider should provide enough information in the workplan to ensure that the EIT Manufacturing resources will be able to take over.

4. Timeline

The indicative timeline for the request for proposals is as follows:

Activity	Responsible	Date
RFP opening	EIT Manufacturing	07/09/2022
Offer submission	Supplier	21/09/2022

Evaluation and notification of award	EIT Manufacturing	27/09/2022
Contract signature	EIT Manufacturing & selected supplier	November 2022
Project start (Kick off meeting)	EIT Manufacturing & selected supplier	November- December 2022

5. Evaluation Criteria and Award Notification

Timely received proposals submitted by the tenderers will be examined, evaluated, and compared in accordance with the following criteria and the contract shall be awarded to the highest ranked tenderer. The decision will be made according to the “Best Value for Money” principle.

- a. A recorded demonstration: solution integrated with NetSuite (incl. Customer portal)
- b. The financial offer
- c. The presentation of the product (clarity, workflow, unlimited access from externals)

An Evaluation Committee of 3 people will be established. Each bid will be evaluated and ranked according to the criteria above.

The compliance with the principles of transparency, non-discrimination, equal treatment, and absence of conflict of interest will be ensured.

The successful and unsuccessful tenderers will be informed in writing (via email) about the result of the award procedure. In case the winning tenderer is unable to enter the contract, EIT Manufacturing may decide to contract the supplier receiving the second highest ranking.

Proposals must be submitted by e-mail within 14 days of the date of notification of the request for proposal. All proposals received after the deadline will be rejected.

In duly justified cases, however, no later than 3 calendar days before the original deadline, the submission deadline can be extended.

Upon request from the tenderer concerned, EIT Manufacturing will as quickly as possible, and in any event within 15 calendar days from receipt of a written request, inform:

- any unsuccessful candidate of the reasons for the rejection of its request to participate,
- any unsuccessful tenderer of the reasons for the rejection of its tender, including, if this is the case, its decision that the works, supplies or services do not meet the performance or functional requirements,

- any tenderer that has made an admissible tender of the characteristics and relative advantages of the tender selected as well as the name of the successful tenderer or the parties to the awarded contract,
- any tenderer that has made an admissible tender of the conduct and progress of negotiations and dialogue with tenderers.

Information referred to above may be withheld where the release of such information would be contrary to the public interest, would prejudice the legitimate commercial interests of an economic operator, or might prejudice fair competition between economic operators.

Should there be a suspicion that the provider will not be able to perform according to the price offered, EIT Manufacturing has the right to ask for explanations and may reject the tender where the evidence supplied does not satisfactorily account for the low level of price or cost proposed.

5. Complaint procedure

Tenderers believing that they have been harmed by an error or irregularity during the award process may file a complaint. Appeals shall be addressed to EIT Manufacturing **only** via the following email address support@eitmanufacturing.eu. The tenderers have five days to file their complaints from the date of receipt of notification of the results.

In your application to EIT Manufacturing the complainant shall explain what procedural aspects they consider having been violated along with any recommendations or remarks. Such claims need to be supported with data and facts and relevant documentation. An appeal whose sole purpose is to obtain a second evaluation for no reason other than that the complainant disagrees with the final award decision is to be rejected.

7. Negotiations & Clarifications

Negotiations can be held in the following cases:

- if it is identified that the scope of services issued by EIT Manufacturing is not detailed enough, incomplete or some areas are lacking crucial information to complete the procedure for direct awards;
- if EIT Manufacturing has the intention to reduce the offered prices to find the best value for money;
- if all submitted prices are above the planned budget and it is everyone's interest to finish the procedure with success – in that case, price negotiation can take place. During a price negotiation, all tenderers are called to lower their prices by the same deadline in a written form;

EIT Manufacturing can organize as many rounds of negotiation as it is needed during the procedure in order to reach the highest quality of proposals and the best price.

Whenever possible, the negotiations should be carried out in writing, however, in special cases, video conference or even live negotiation can be organized. EIT Manufacturing also reserves the right to invite the tenderers to an individual meeting before the final award of contract in order to clarify details and ambiguities.

In case of obvious or perceived errors or omissions in the RFP, Tenderers can request additional information or clarifications by the deadline provided in the above timeframe through email at support@eitmanufacturing.eu.

Upon receipt of the bids, they will be reviewed, and additional details will be requested from the tenderers as needed. The requests as well as the answers are to be submitted written by e-mail. Where information or documentation to be submitted by tenderers is incomplete or erroneous or where specific documents are missing, EIT Manufacturing staff may request the party concerned to submit, supplement, clarify or complete the relevant information or documentation within 5 days.

Bid preparation costs are not reimbursable and must be borne by the tenderers.

EIT Manufacturing owns all bids received in this RFP. Proprietary information of vendors in the bids will be kept strictly confidential. The offers as well as the contract may be submitted for audits.

8. Contract

The final award does not yet constitute the Contract. The Contract will be concluded at the time of signature by the Supplier and EIT Manufacturing. The winning supplier will be sent the contract to be signed (indicating the deadline by which the signed contract should be returned to EIT Manufacturing).

The invoicing will be based on a mutually agreed schedule; it will be detailed in the contract. The contract that will be awarded will have a maximum duration of 3 years. The tenderer agrees that the total value of the contract to be signed with EIT Manufacturing for 3 years will not be raised and the amount initially agreed will remain the same for the full duration of the contract. **A one-off implementation should not exceed 10 000€ (excl. VAT) per year and the recurring cost (licenses) should not exceed 8 000€ (excl. VAT) per year.**

The awarded supplier will be requested to sign Standard Contractual Clauses (SCC) if no other GDPR compliant safeguards exist, and the supplier is located in a country for which the EU commission has not issued an adequacy decision.

9. Cancellation of the proposal procedure

In the event of cancellation of the proposal procedure, EIT Manufacturing will notify tenderers of the cancellation. In no event shall EIT Manufacturing be liable for any damages whatsoever including, without

limitation, damages for loss of profits, in any way connected with the cancellation of a proposal procedure, even if EIT Manufacturing has been advised of the possibility of damages.

The tenderer shall take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests'). S/he should inform the EIT Manufacturing team immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

The supplier cannot be a EIT Manufacturing Partner or Activity Partner. Any bid from such an economic operator will be rejected.

Tenderers will be excluded if:

- a) they are being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations; they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- b) they have been guilty of grave professional misconduct proven by any means which the EIT Manufacturing can justify;
- c) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or any other country of the EU;
- d) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the EU' financial interests;
- e) following a procurement procedure or grant award procedure financed by the EU budget, they have been declared in serious breach of contract for failure to comply with their contractual obligations.

The tenderers must not be in a situation of a conflict of interest, and they have sufficient economic and financial capacity, technical and professional capacity and legal and regulatory capacity to perform the requested services. A declaration of honour regarding the above shall be signed by the tenderer. Additional evidence or declarations might be requested by the contracting authority.

EIT Manufacturing reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities, conflict of interest or fraud. If substantial errors, irregularities, conflict of interest or fraud are discovered after the award of the Contract, EIT Manufacturing may refrain from concluding the Contract.