**Customer requirements and Contractor response**

## Introduction

### Overall description of the Customer’s needs

The Financial Mechanism Office seeks to develop a unified and centralised multisite platform for the EEA and Norway Grants to replace over 100 independent websites managed by Beneficiary States’ National Focal Points (NFPs), Fund Operators (FOs) and Programme Operators (POs). This decentralised approach has led to inconsistencies in branding, user experience, and difficulties in content management and oversight. The goal is to ensure consistent branding, enhance user experience, improve integration with existing Grants’ systems, and streamline communication efforts, compliance, and oversight.

### Requirement types and guide to answering

All requirements in the specification are minimum requirements. Failure to meet any requirement may lead to the rejection of the offer. Even though the requirements must all be fulfilled, the way in which they are fulfilled will also be assessed as a part of the quality-assessment of the offer. Proposals that add significant value will be scored higher than solutions that only meet the minimum standard set by the requirement.

* The Contractor shall answer the requirement with a confirmation on whether the requirement is Fulfilled (“YES”) or Not fulfilled (“NO”) by the proposed solution.
* The Contractor must provide a detailed description of the proposed solution for each requirement, enabling the Customer to verify fulfilment, understand the solution, and assess its quality.

The Contractor is responsible for answering the specifications clearly and in enough detail.

#### Answering the Customer’s requirements in the table:

The table of requirements has the following content:

|  |  |  |  |
| --- | --- | --- | --- |
| **Nr.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
|  | [Requirement] [Documentation requirement/instruction *(Blue italic text)*] |  |  |
|  | … |  |  |

* **Requirement:** is the Customer’s description of a need, a service or a function, including any required documentation to be submitted by the Contractor or instruction on how to respond *(Blue italic text)* to the requirement.
* **Contractor confirmation (Yes / No):** the Contractor shall use this column to signify whether the requirement, in the opinion of the Contractor, is fulfilled by their offer.
* **Contractor response:** is the section designated for the Contractor’s response to and description of each requirement.

#### General guidelines for responding to the Customer’s requirements:

* All of the Customer’s requirements shall be answered in their entirety in the table, unless an appendix is necessary to answer the requirement with sufficient detail.
* The Contractor is, on a general basis, asked to answer in a concrete and concise manner.
* Should appendices be used to answer any of the requirements, such appendices shall be clearly mentioned in the response section of the requirement (“Contractor response”). The Contractor shall answer the requirement in its entirety in such appendices with clear reference to the Customer’s requirement.
* For requirements with a page limit, any illustrations, pictures, figures and / or screenshots will not be counted against the limit.

## Customer requirements

### Functional requirements

| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| --- | --- | --- | --- |
| 1 | The Contractor shall build a multisite platform (e.g. WordPress Multisite, Drupal, Sanity or similar) that is capable of hosting all national and programme/fund-specific websites under the EEA and Norway Grants. The platform shall follow industry best practices for web development.*The Contractor shall submit an overall solution description outlining the development of a multisite platform. The description shall, at minimum, include description of development methodology, project management methodology, suggested strategy for deployment and launch, strategies for maintenance and support of the platform and method for carrying out further development. The description shall further include a suggested timeline for the development, deployment and launch of the multisite platform. The description shall not exceed 5 A4 pages in length (excluding illustrations, figures, pictures and the like).* |  |  |
| 2 | The Contractor shall, as part of the development, provide a comprehensive UI / UX design for the multisite platform. The design shall be modern, visually appealing and in line with the Customers branding guidelines. *The Contractor is asked to describe their experience with UI / UX design and outline how they intend to fulfil the requirement.*  |  |  |
| 3 | The multisite platform shall enable the creation and management of multiple sites within the network, each with localised content.*The Contractor shall describe how their platform will fulfil the requirement.*  |  |  |
| 4 | The platform shall support the use of role-based permissions to ensure that users can only access and modify authorised content and settings. The platform shall, at least, be able to support three separate roles.It must be possible to prompt users to agree to terms and conditions before they are given content management access. *The Contractor shall describe how user roles and permissions are handled in the platform, including what roles are available as standard, what separates the different roles and whether roles can be customized.* |  |  |
| 5 | The platform shall support multiple languages across the front-end, including menus, content etc., for each site as required by the Beneficiary States (expected to be 2 languages per country: national language and English). *The Contractor is asked to describe how multiple languages can be supported in their platform.* |  |  |
| 6 | The platform shall be developed to ensure optimal performance on desktops, tablets and mobile devices (responsive design). *The Contractor is asked to describe how the requirement will be fulfilled by their platform.* |  |  |
| 7 | The platform shall secure branding consistency, ensuring that all sites are aligned with the EEA and Norway Grants branding guidelines. It must be possible for the Customer to develop templates and themes that allow localised customisation while maintaining overall consistency. The relevant parts of the EEA and Norway Grants Communication and Design Manual, that the platform shall live up to are (at minimum):* Logo use and placement
* Typography
* Colour pallet
* Image and illustration use

*The Contractor is asked to describe how branding consistency is supported by their platform.* |  |  |
| 8 | The platform shall be integrated with the EEA media library, ensuring compatibility and data protection compliance with the existing Digital Asset Management system (Digizuite) and provide access to shared media assets across all sites through the media library. The integration shall ensure a direct connection between the platform’s CMS and Digizuite. The connection shall include search and categorization options for easy retrieval of images, videos and documents. It shall further include automated image optimization for different screen sizes and loading speeds, and file versioning and replacement tools to update documents without breaking existing links. An extensive description of the current API for the EEA media library can be found here: [DC 5.4 API Documentation - Documentation - KeyShot Confluence](https://digizuite.atlassian.net/wiki/spaces/DD/pages/1257999800/DC%2B5.4%2BAPI%2BDocumentation)*The Contractor shall describe how it intends to ensure a seamless integration with the EEA media library.* |  |  |
| 9 | The multisite platform must be integrated with the Customer’s grants management IT system (GrACE). GrACE (Grants Administration and Collaboration Environment) is a documentation, information, reporting and business process system which has been custom designed and built for the EEA and Norway Grants. It is used daily by over 1000 users in 20 countries around Europe. It is designed and planned by the Customer in collaboration with an external software company for development and maintenance services. The integration shall utilize existing connections to integrate with the GrACE system, it shall enable real-time two-way exchange of data (such as calls for proposals, legal documents, reports and analytics data in cooperation with the developers of the GrACE system). It shall further enable the implementation of systems for automatic data updates between platforms. The multisite platform must additionally be able to cache data, to avoid issues with downtime connected with the monthly redeployment of GrACE. The API for GrACE is currently being developed in an iterative manner and the chosen contractor is expected to provide relevant inputs / comments to the development of the API. *The Contractor shall describe how it intends to ensure a seamless integration with GrACE.* |  |  |
| 10 | The platform shall support robust search functionality that enables efficient and accurate information retrieval for both internal and external users. This functionality must include at least the following functions:* Comprehensive Search: The platform shall allow the FMO to perform searches across all sites within the multisite network, while external users shall be able to search within the specific website they are accessing.
* Fuzzy Search: The search functionality shall employ approximate string-matching techniques such as fuzzy search to return relevant results even when search terms contain typos or misspellings.
* Faceted Search: The platform shall enable users to refine search results using various filters, including categories, tags, date ranges, and other relevant criteria.
* Search Result Ranking: Search results shall be displayed in a clear and logical order, with the most relevant results appearing first. The ranking algorithm should consider factors such as keyword relevance, content freshness, and user engagement.
* Multilingual Support: The search functionality shall support multiple languages to accommodate diverse user groups.

This search functionality shall be designed to meet the needs of diverse users, providing an intuitive and effective way to find the information they need within the multisite platform.Administrators shall have the ability to configure search parameters, ranking algorithms, and filters to meet specific site or organizational needs.*The Contractor shall describe the search functionality of the proposed platform.* |  |  |
| 11 | The platform shall have tools for announcing events such as workshops and seminars. It shall further allow users to sign up for events directly through the site. *The Contractor shall describe how event management will be implemented in the platform.* |  |  |
| 12 | The platform shall include tools for newsletters, including the ability to connect with platforms like MailChimp for newsletters. *The Contractor shall describe the tools for newsletters and other types of communication present in the platform.* |  |  |
| 13 | The platform shall enable easy sharing of content to social media platforms. It shall further allow the display of live feeds from official social media accounts through dedicated platforms like Juicer. *The Contractor shall describe how the platform can share content to existing and (possible) future social media platforms and the ability to display a live feed of social media content.* |  |  |
| 14 | The platform shall enable the Customer to create contact forms, surveys and application forms. It shall further ensure accurate data collection with validation rules and implement tools to prevent spam submissions. *The Contractor shall describe how it intends to handle forms and data collection in the platform.* |  |  |
| 15 | The platform shall include analytics tools to monitor site performance. It shall further provide site admins with access to key metrics and reports. *The Contractor shall describe the platforms functionality regarding analytics and reporting.* |  |  |

Content Management System (CMS)

| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| --- | --- | --- | --- |
| 16 | The platform shall have a content management system (CMS) that offers robust and user-friendly content editing capabilities. The CMS shall ensure that non-technical users can efficiently create, manage and publish content across multiple sites while maintaining consistency, accessibility and editorial control. *The Contractor is asked to describe the CMS available in their platform.* |  |  |
| 17 | The CMS shall have a content editing interface that includes the following:* A WYSIWYG (What You See Is What You Get) editor that allows users to format text, insert images, embed media and create links without needing to write code.
* A block-based or modular editor that enables structures content creation, allowing users to drag and drop predefined content elements (e.g. text blocks, images, videos or buttons).
* Support for rich media embedding, including images, videos, documents and social media content.
* An inline editing feature allowing direct modifications on the front end of the website for a more intuitive experience.

*The Contractor is asked to describe the content editing interface in the platform, focusing on the bullet points above.*  |  |  |
| 18 | The CMS shall have functionality for structuring content, including:* Customizable content types with different templates to accommodate various types of pages, such as news articles, events, case studies and standard pages.
* Taxonomy and tagging system to categorize and organize content for better navigation and searchability.
* Reusable content blocks that allow content to be created once and displayed across multiple pages or sites.
* Version control and revision history to track changes, compare different versions of content and restore previous versions if needed.
* Scheduling and publishing options for setting content to go live at specific dates and times.

*The Contractor is asked to describe the content structuring capabilities of the CMS, based on the bullet points above.* |  |  |
| 19 | The CMS shall fully support the multisite set-up and the multiple languages used across all sites. This shall include:* A multisite management system that allows content to be shared or customized across different sites while maintaining overall governance.
* Multilingual content capabilities, supporting multiple languages with easy content translation workflows.
* Content synchronization options for replicating or linking content across different sites in the multisite network.

*The Contractor is asked to describe how the CMS fulfils the requirement.* |  |  |
| 20 | The CMS shall support a granular role-based access control, allowing different levels of permissions for editors, administrators, content contributors and reviewers. It shall further have approval workflows for content publication, where drafts can/must be reviewed and approved before going live. Finally, the CMS shall have content locking or concurrent editing prevention, to ensure multiple users do not overwrite each other’s work. *The Contractor is asked to describe how the CMS handles roles and permissions.*  |  |  |
| 21 | The CMS shall have automatic backups and restore options for content recovery. The CMS shall further have content moderation tools, including spam filtering and comment management. *The Contractor is asked to describe the content recovery and content moderation features of the offered CMS.* |  |  |
| 22 | The CMS shall support third-party integrations, including analytics, marketing tools and social media platforms. It shall further have an API-first approach or plugin/module system for extending functionalities as needed, and support webform and interactive content, such as polls and survey submission. *The Contractor is asked to describe how their CMS will fulfil the requirement.* |  |  |
| 23 | The CMS shall have built-in SEO tools, including metadata management, URL customization and structured data support. It shall further have automated and manual accessibility checks to ensure compliance with WCAG and alt text management for images to improve accessibility and SEO.*The Contractor is asked to describe how their CMS will fulfil the requirement.*  |  |  |
| 24 | The CMS shall include a logging and version history functionality to enable the Customer to maintain an overview of when and where content was created, edited or deleted, and by what user. It shall further be possible, for the Customer and the Content creators to revert to previous versions of the content. *The Contractor is asked to describe the logging capabilities of their CMS.*  |  |  |

### Non-functional requirements

| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| --- | --- | --- | --- |
| 25 | The platform must, at least, live up to the following security requirements:* Have implemented measures to safeguard against data breaches and unauthorised access
* Use HTTPS protocols across all sites (SSL encryption)
* Support two-factor authentication
* Support single sign on for the Customer

*The Contractor shall describe and document the safety measures implemented in their platform, including, but not limited to the bullet points listed in this requirement.* |  |  |
| 26 | The Contractor shall ensure that the platform is easy to maintain, by adhering to website development standards and best practices, creating detailed technical documentation and by designing the platform to allow for easy updates and integration of new features.The technical documentation must be shared with the Customer. *The Contractor is asked to describe how they will ensure the maintainability of the platform.* |  |  |
| 27 | The Contractor shall ensure the usability of the platform by designing intuitive interfaces for both front-end users and administrators, by maintaining consistent design elements throughout the platform.*The Contractor is asked to describe how they will ensure the usability of the platform.* |  |  |
| 28 | The platform shall be easily scalable, including the ability to: * add capability to handle increased traffic, and
* add more subsites to the multisite if required.

*The Contractor is asked to describe the scalability of the platform. The description must, at least, address the abovementioned scalability methods.* |  |  |
| 29 | The Contractor shall ensure optimal performance, including optimising page load time to not exceed 3 seconds on average connections, using techniques like image compression, code minification and lazy loading. *The Contractor is asked to describe how they intend to ensure the performance of the platform.* |  |  |
| 30 | The Contractor shall use properly licensed software and document all licenses. The Contractor shall further adhere to all applicable laws, including EU web accessibility directives. *The Contractor is asked to confirm that they will live up to the requirement and submit sufficient documentation to support this.*  |  |  |
| 31 | The platform shall be hosted within the EEA in a hosting environment ensuring reliability and security. *The Contractor is asked to confirm that they will live up to the requirement and submit sufficient documentation to support this.* |  |  |
| 32 | The Contractor shall implement practices for efficient development workflows and set up environments for development, testing and production. *The Contractor is asked to briefly describe their practices for efficient development and their approach to using different environments.* |  |  |
| 33 | The platform must maintain a proper audit trail, including logging technical changes and errors. *The Contractor is asked to describe the proposed logging functionality.* |  |  |
| 34 | The platform shall be reliable and highly available. This includes a minimum uptime of 99,85 %, implemented redundancy and backup systems to prevent data loss and established procedures for system recovery.*The Contractor shall describe and document how they will ensure the reliability and availability of the platform.* |  |  |

### Training needs

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| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| 35 | The Contractor shall provide and implement a training plan for users of the multisite, be available for conducting training sessions for the Customer and associated users of the platform. The training plan and training sessions must provide sufficient and suitable training for users at different levels. All training sessions in the training plan are optional for the Customer. The Contractor shall further provide comprehensive user manuals and technical guides as part of their delivery, to enable the Customer to train local teams in the use of the platform.*The Contractor shall confirm that they will live up to the requirement and is asked to briefly describe the training plan and the training sessions for different users.* |  |  |

### Development team

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| --- | --- | --- | --- |
| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| 36 | The Contractor shall offer a development team for this project. The team shall consist of resources with prior proven experience in developing large-scale multisite platforms. They should further: * have expertise in the chosen CMS and relevant technologies,
* have a strong understanding of integration with external systems (with or without APIs),
* have the capacity to deliver within tight deadlines,
* be available for regular meetings and updates during the development phase, and
* be committed to transfer knowledge and build capacity for internal teams.

*The Contractor shall describe their offered personnel for the project. The description shall address how the Contractor aims to handle all of the points mentioned in the requirement. The Contractor shall, in addition, submit CVs for all offered resources.*  |  |  |

### Compliance and regulatory requirements

| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| --- | --- | --- | --- |
| 37 | While the FMO is not legally bound by the General Data Protection Regulation (GDPR), it will assume the role of data controller on a good faith basis and solely within a contractual setting. A data processing agreement (DPA) will be signed between the FMO, acting as the controller, and the Contractor, acting as the processor, to define their respective responsibilities regarding the processing of personal data.The Contractor and all deliverables shall comply with all aspects related to the delivery. This includes, but is not limited to:* Implementing tools to manage user consents
* Providing mechanisms to anonymize personal data when required
* Implementing appropriate technical and organizational security measures to protect personal data.
* Having procedures in place for data breach notification and management.
* Maintaining records of processing activities
* Ensuring that the Multisite platform includes privacy notices and cookie notices (when relevant)

The Contractor is responsible for ensuring that any subcontractors also comply with GDPR. *The Contractor is asked to confirm that they will live up to the requirement and submit sufficient documentation to support this.* |  |  |
| 38 | The platform must be compliant with EU web accessibility directives. The platform must be compliant with the latest WCAG standards for accessibility (currently 2.2).*The Contractor is asked to confirm that they will live up to the requirement and submit sufficient documentation to support this.* |  |  |

### Maintenance requirements

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| **Nr.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| 39 | The Contractor shall maintain the deliverables throughout the contract lifetime. The maintenance services shall include:* Ensuring that the multisite platform has the agreed functionality and capability throughout the contract term, including third party integrations
* Error rectification within the response times given in the SLA
* Regular updates to the platform's software, plugins, and themes to ensure that performance, functionality, and compatibility are not degraded throughout the contract period.
* Maintaining up-to-date documentation for the platform, including technical specifications, user manuals, and training materials.
* Security updates and patching
* Accessibility updates when necessary to comply with EU accessibility directives
* Updates to comply with regulatory changes
* Implementing and maintaining a robust backup and disaster recovery plan to ensure business continuity in case of unexpected events.
* Monitoring of site performance, errors and resource usage.

In addition, the Contractor shall conduct vulnerability testing and assessments, at least once a year. *The Contractor is asked to confirm that they will live up to the requirement and submit descriptions of the offered maintenance services.*  |  |  |

### Support and service level agreement requirements

| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| --- | --- | --- | --- |
| 40 | **Helpdesk function**The Contractor shall offer a helpdesk function throughout the contract period. The helpdesk shall, as a minimum:* Be a centralised system to triage, categorise and prioritise all incoming requests
* Be accessible by all users for initial queries and issue reporting
* Have clear workflows for routing requests to the appropriate support team or department
* Provide automated acknowledgment of submitted tickets with estimated response times
* Enable reporting and tracking of helpdesk metrics (e.g. resolution time, ticket volume etc.).

The helpdesk function is optional for the Customer and might be phased out during the contract lifetime. *The Contractor is asked to describe their offered helpdesk solution and document their suggested method for fulfilling the specific points in the requirement.* |  |  |

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| 41 | **Support function:**The Contractor shall maintain a support function throughout the contract period. The support function shall, as a minimum:* Be a support function for technical and functional issues for all users following referral of requests from other stakeholders by the Customer’s staff
* Have access to advanced diagnostic tools to resolve Customer-related issues efficiently
* Regularly share knowledge and documentation with the Customer’s staff to empower self-help capabilities
* Maintain a knowledge base accessible internally to the Customer.

*The Contractor is asked to describe their offered support function and document their suggested method for fulfilling the specific points in the requirement.* |  |  |

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| **No.** | **Requirement:** | **Contractor confirmation (Yes/No):** | **Contractor response:** |
| 42 | **SLA:**The Contractor shall offer a service level agreement (SLA) effective as of the launch of the multisite and throughout the contract lifetime. The SLA shall provide the FMO with a high service level, and must as a minimum include: * Maximum response times for support
* Maximum error rectification times and system recovery/disaster recovery times for:
	+ Critical Issues (max 3 hours)
	+ High priority issues (max 1 calendar day)
	+ Medium priority issues (max time set by tenderer)
	+ Low priority issues (max time set by tenderer)
* Availability of helpdesk and support functions
* Guarantees for upholding the agreed uptime of at least 99,85% for the solution
* Sanctions for breaching the SLA as well as a system for escalation for urgent or critical Customer-specific issues.
* A point system or similar for included support hours and helpdesk hours per year. The points shall roll over from year to year, and it shall be possible to convert unused support points to development hours.
	+ The basic SLA tier must include points equivalent to 80 effort days of support
	+ The standard SLA tier must include points equivalent to 120 effort days of support
	+ The extended SLA tier must include points equivalent to 200 effort days of support
	+ The premium SLA tier must include points equivalent to 250 effort days of support

The SLA shall have the possibility to choose between different service tiers for the amount of support points included in the SLA. *The Contractor is asked to confirm that they will live up to the requirement and describe the offered SLA, including response times, and the features of the different service tiers.*  |  |  |