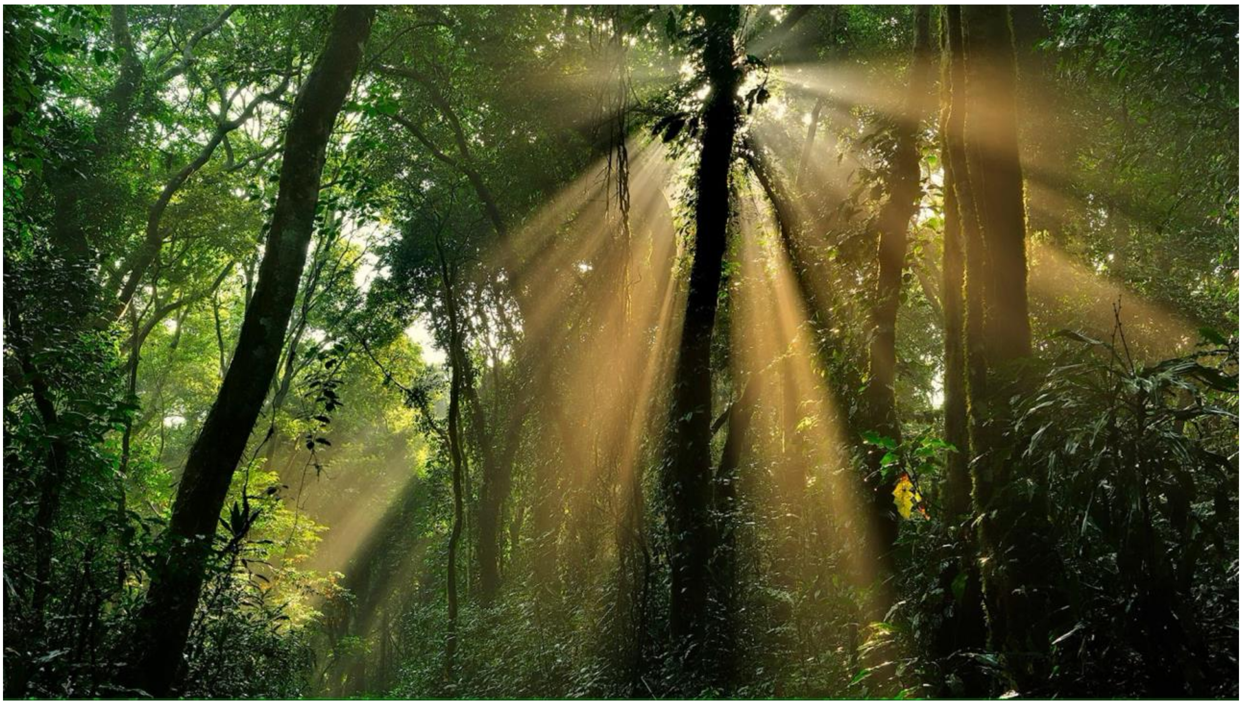
Invitation to tender
Qualification and competition

Purchase of CRM solution

Competition with negotiation



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1 COMPETITION WITH NEGOTIATION

1.1 Introduction

Regnskogfondet (hereinafter referred to as RFN or the Customer) invites potential bidders to competition with negotiation in connection with entering into an agreement for the purchase of a CRM solution.

1.2 The Customer

Rainforest Foundation Norway (RFN) is one of Europe's leading organizations working to protect the world's rainforests and strengthen the rights of indigenous peoples. To achieve it's objectives, RFN operates at both local/national and international levels.

At the **local and national level**, RFN collaborates with indigenous and environmental organizations in Southeast Asia, Central Africa, and the Amazon region. At the **international level**, RFN engages with key public and private stakeholders to advocate for better governance and management of deforestation-related practices.

RFN employs approximately **100 staff members**, with around **75 based at the head quarters in Oslo** and about **20 at the organization's country office in the Democratic Republic of Congo (DRC)**. Additional staff work in or travel regularly to **Indonesia, Papua New Guinea, Brazil, Colombia, Peru, France, Canada, the United Kingdom, and China.**

Remote work is a core component of RFN's operational model, enabling collaboration across continents and time zones. Many employees work from home or in the field, and this flexibility is essential to the organization's ability to maintain strong partnerships and respond effectively to global challenges.

For more information about our work, please visit: https://www.regnskog.no/en/what-we-do

1.3 The Agreement

1.3.1 Purpose

The objective of this acquisition is to meet the Customer's needs for a CRM tool (CRM) and ensure that all employees across time zones and geographical areas have easy, fast, flexible and stable access.

RFN frequently engages and interacts with a broad range of external stakeholders, from financial institutions and companies to networks of civil society organizations, and local partners on the ground in rainforest countries. The core needs of RFN for a CRM system are centered around managing this wide and diverse contact network of external stakeholders, and systematizing the outreach to this network in a strategic way.

The platform should also support some key project management features such as narrative and indicator reporting and analytics. This can include, but not exclusive to, logframe integration such as customisable logframe templates, indicator definitions and guidance, indicator performance tracking (baselines, targets, actuals), data disaggregation, and data aggregation. In addition, there is a need to use the system for data analysis and the creation of dashboards.

RFN uses a tailored CRM (provided by Profundo) to manage relations and track transactions from individual donors (primarily in Norway). The relationship and transaction management of individual donors is outside the scope of this tender. As per RFNs strategic plan for digitalization this is to be assessed by 2027.

1.3.2 Scope

The Rainforest Foundation (RFN) has recently adopted a strategic plan for digitalization for the period 2025–2027. RFN uses Microsoft 365 and cloud-based solutions. The strategic digitalization plan envisages that RFN will retain Microsoft as the basis for its ecosystem, also in other areas, while seeking to reduce the total number of suppliers and solutions. The strategic digitalization plan forms the framework for this acquisition of a CRM solution.

The solution for which a bid is to be submitted must therefore be based on **Microsoft Dynamics 365 CRM**. The solution is to be delivered as “Software-as-a-service” – SaaS. The procurement will also include assistance in connection with the establishment of the solution, including parameter setting, interfaces and training.

1.4 Procurement documents

Complete procurement material consists of:

- Invitation to tender - qualification and competition criteria (this document)
- SSA-L – General terms and condition
- SSA-L - Appendixes
    - Appendix 1: Customer specification of requirements
    - Appendix 2: The Supplier’s description of the service
    - Appendix 3: Plan for the establishment phase
    - Appendix 4: Service level with standardized damages

- Appendix 5: Administrative provisions
- Appendix 6: Total price and pricing provisions
- Appendix 7: Changes to the general contractual wording
- Appendix 8: Changes to the service after the establishment of the Agreement
- Appendix 9: Terms for the Customer’s access to and use of third-party deliverables

1.5 Tentative progress schedule for the procurement process

Planned date/week	Activity
18.08.2025	Request for qualification deadline
Week 34-35	Evaluation of qualification requests, as well as selection of suppliers
Week 36	Invitation to submit offers
TBD	Offer deadline
TBD	Evaluation of offers and negotiations
TBD	Signing of contract

2 CONTRACT

2.1 Type of contract

The contractual relationship will be regulated by The Norwegian Government's Standard Terms and Conditions for IT Procurement SSA-L with associated annexes, cf. section 1.4. The Customer recommends that suppliers thoroughly familiarize themselves with the contract and the annexes.

The Customer intends to enter into an agreement with 1 supplier.

2.2 Contract period

The Agreement will be for a term of three (3) years calculated as from the delivery date. The Agreement shall thereafter be renewed automatically for a term of one (1) year at a time, unless the Customer terminates the Agreement by giving three (3) months' notice prior to the renewal date. The Supplier may terminate the Agreement by giving twelve (12) months' notice prior to the renewal date.

3 QUALIFICATION AND OFFER

3.1 Procedure

The Customer *is not* subject to the Act of 17 June 2016 No. 73 on Public Procurement (LOA), but follows principles set by Norad for procurements. Otherwise, the provisions set out in this document apply.

The procedure for this competition consists of two stages. The first stage involves all interested suppliers submitting a request to participate in the competition. In the second stage, qualified and selected suppliers are invited to submit offers.

3.2 Stage 1 Qualification

3.2.1 Deadline for requests to participate

The deadline for submitting qualification requests is set for 18.08.2025.

Late requests may be rejected.

3.2.2 Submitting Qualification Requests

Requests for qualifications should be submitted to the address below and should be in English. The request must be in writing and binding. Requirements for qualification and documentation requirements are specified in sections 4 and 7.

Address:
regnskog@regnskog.no

3.3 Step 2 Offer

3.3.1 Offer deadline

The deadline for submitting offers will be stated in the invitation to submit offers.

3.3.2 Submission of offers and validity period

The offer shall be submitted as specified in the invitation to submit an offer and shall be in English. The offer shall be in writing and binding. The supplier is bound by the offer for 3 months after the deadline for submission of the final offer.

3.3.3 Partial offers

It is not permitted to submit bids for parts of the assignment.

3.3.4 Alternative offers and parallel offers

It is not permitted to provide alternative offers.
It is not permitted to make parallel offers.

3.4 Confidentiality

The Customer and its employees are obliged to prevent others from gaining access to or knowledge of information about technical devices and procedures or operational and business conditions that it would be of competitive significance to keep secret.

3.5 Personal data

If personal data, such as names of offered resources, CVs or similar, is submitted as part of the request/offer, the Customer will be considered the controller of this data upon receipt. The personal data will only be used in connection with the implementation of the procurement, and possibly in contract follow-up if the supplier is awarded the contract.

3.6 Deviations

There is no opportunity for significant deviations from the procurement documents. Tenders containing such significant deviations will be rejected.

3.7 Corrections, additions or changes to the qualification and competition documents

Within the deadline for submitting requests for qualifications and the expiry of the tender deadline, respectively, the contracting authority has the right to make corrections, additions or changes to the qualification and competition documents that are not of a material nature.

3.8 Additional information

If the supplier finds that the qualification and competition documents do not provide sufficient guidance, additional information can be requested in writing to the following address:

Address:
regnskog@regnskog.no

4 REQUIREMENTS FOR SUPPLIERS

4.1 Qualification requirements

The supplier's qualifications will be assessed based on the qualification requirements set out below.

4.1.1 Requirements related to the supplier's registration, authorizations, etc.

Requirement	Documentation requirements
The supplier must be a legally established enterprise	Norwegian companies: Company certificate (Firmaattest) Foreign companies: Proof that the company is registered in the trade register or business register as prescribed by the legislation of the country where the supplier is established.

4.1.2 Requirements related to the supplier's economic and financial capacity

Requirement	Documentation requirements
The supplier must have sufficient economic and financial capacity to fulfill the contract.	The company's latest annual accounts including notes, the board's annual report and auditor's report, as well as more recent information that is relevant to the company's accounting figures. It will be verified that the supplier has profitable operations and positive equity.

If the supplier has a legitimate reason (e.g. a newly started business) for not providing the documentation required by the client, the supplier may document its economic and financial capacity with any other document that the client deems appropriate.

4.1.3 Requirements related to the supplier's technical and professional qualifications

Requirement	Documentation requirements
The supplier must have good experience from similar assignments. Similar assignments mean deliveries of MS Dynamics 365 CRM to comparable	Brief description of the most important deliveries in the last three years, including information about the value of the contract, time of delivery, name of the client and a

Requirement	Documentation requirements
organizations, hereunder non-governmental organizations (NGO's), as SaaS.	description of the content of the assignment. Documentation of deliveries to the most comparable organizations will be given positive weight when evaluating this requirement, cf. section 5.1.
The supplier must have sufficient capacity to carry out the contract – including personnel available for physical meetings and service deliveries in Oslo.	A description of the supplier's average annual workforce and number of management employees over the past three years – including geographical location.
The supplier must have a quality assurance system relevant to the content of the contract.	A description of the supplier's quality assurance system. This may be documented by submitting a certificate issued by independent bodies as documentation that the supplier meets quality assurance standards, for example ISO 9001:2015.

4.1.4 Tax certificate

When submitting a request for qualification, suppliers must submit a tax certificate for VAT and a tax certificate for tax. This only applies to Norwegian suppliers.

The tax certificate must not be older than 6 months from the deadline for submitting a request to participate in the competition or a tender.

The contracting authority reserves the right to reject suppliers who have not fulfilled their obligations to pay taxes and fees.

5 PROCESSING OF QUALIFICATION REQUESTS

5.1 Completion of Step 1 Qualification

The Customer will invite a minimum of three suppliers from the requests received for qualification to submit offers in the competition, provided that there is a sufficient number of suppliers. Selection will be made based on the Client's assessment of which suppliers are best qualified based on submitted documentation related to the selection criteria “The supplier must have good experience from similar assignments”, cf. above section 4.1.3.

Requests for participation from redundant, qualified suppliers will be rejected.

5.2 Notification of rejection

The Customer will inform all suppliers in writing if the request to participate in the competition is rejected.

6 PROCESSING OF THE OFFERS

This procurement is carried out in two stages: Stage 1 is qualification and stage 2 is competition, cf. section 3.1 Procedure. Section 6 Contracting authority's processing of the offers sets out the premises for the competition (stage 2), and is only relevant for those suppliers who receive notification that they are qualified and invited to submit offers.

Updates to the procurement documents (cf. section 1.4) may be made when sending out the invitation to submit a tender.

6.1 Procedure

Cf. section 3.1 Procedure. In the negotiations, it will be possible to negotiate all aspects of the offer.

A reduction in the number of offers to be negotiated will be made on the basis of the stated award criteria. An initial reduction based on the award criteria may take place prior to the negotiations.

The contracting authority will conclude the negotiations by setting a deadline for receipt of the final offer.

6.2 Award criteria

The award is made based on which offer has the best price-quality ratio, based on the following criteria:

Nr.	Type criterion	Award criterion	Weight	Documentation requirements
1	Price	Total evaluation price; cf. pricing as stated in Appendix 6 Attachment 1.	50%	Completed Appendix 6 Attachment 1 Price form.
2	Quality	Response to the requirements table in Appendix 1; Customer specification of requirements	40%	Completed Appendix 2.
3	Quality	Service level with standardized damages.	10 %	Completed Appendix 4.

6.3 Award of contract

Suppliers who have participated in the competition will receive written feedback on who the Customer will contract with.

7 CHECKLIST AND DESIRED PRESENTATION

Complete requests for qualification and offers should **not** be submitted together as a zip file. Complete qualification request and offers (for those suppliers invited to offer), should consist of the following files:

Step	Documentation	Reference
1 Qualification	Signed request for qualification stating the name of the company and contact person. Any reservations regarding the tender documents must be clearly stated in the supplier's request with reference to where in the request the reservation appears (page number and paragraph number).	
1 Qualification	Documentation for requirements related to the supplier's registration, authorizations, etc. The supplier must be a legally established enterprise.	Pkt. 4.1.1
1 Qualification	Documentation for requirements related to the supplier's economic and financial capacity.	Pkt. 4.1.2
1 Qualification	Documentation for requirements related to the supplier's technical and professional qualifications.	Pkt. 4.1.3
1 Qualification	Tax cerificate	Pkt. 4.1.4
Step	**Documentation**	**Reference**
2 Offer	Signed offer letter. Deviations must be clearly stated in the offer letter with reference to where in the offer the deviation appears (page number and paragraph number).	
2 Offer	Completed: Appendix 2: The Supplier's description of the service Appendix 3: Plan for the establishment phase Appendix 4: Service level with standardized damages Appendix 6: Total price and pricing provisions Appendix 9: Terms for the Customer's access to and use of third-party deliverables	

Failure to submit documentation may result in rejection.
* * *

Appendix to the Agreement concerning Ongoing Purchases of Services via the Internet

The Norwegian Government's Standard Terms and Conditions for IT Procurement
Appendix to SSA-L – version 2018

Contents:

Appendix 1: Customer specification of requirements

Clause 1.1 of the Agreement, Scope of the Agreement

The Rainforest Foundation (RFN) has recently adopted a strategic plan for digitalization for the period 2025–2027. RFN uses Microsoft 365 and cloud-based solutions. The strategic digitalization plan envisages that RFN will retain Microsoft as the basis for its ecosystem, also in other areas, while seeking to reduce the total number of suppliers and solutions. The strategic digitalization plan forms the framework for acquisition of a CRM solution.

The solution for which a bid is to be submitted must therefore be based on **Microsoft Dynamics 365**. The solution is to be delivered as Software-as-a-service – “SaaS”.

The agreement will also include training and consultancy in connection with configuration, customization and/or integration.

Requirements

The requirements for the solution (to be further developed) are formulated as short user stories. The tentative requirements are based on the needs of selected organizational positions that are key users of the solution. The requirements list is not exhaustive of the overall needs of these organizational units or RFN but represents basic needs that must be addressed in the solution that is offered and established. The Supplier must answer the requirements in Appendix 2. In the answer, the Supplier must describe how the individual requirement/individual user story is solved in MS Dynamics 365, possibly in the form of additional functionality - or whether the requirement/user story cannot be solved or can be solved in a better way in other system solutions.

Introduction

RFN requires a CRM tool that can meet the needs of various departments/teams in the organization. While each team has some unique needs, several of the needs overlap. Multiple teams in the organization are upscaling their portfolios and professionalizing their partnership work, which speaks to the priority of establishing a CRM system that can meet several organizational needs.

Implementation of the CRM system should meet the organization’s needs to manage relationships with various stakeholders amongst them: donors (private, corporate and institutional), individuals interested in RFN and its work, partners, corporate businesses and other stakeholders. The platform should support tracking interactions and other relevant data, streamline operations and improve collaboration between teams in RFN.

RFN has a range of target groups and stakeholders, examples are:
A) Indigenous Peoples and Local Communities (IP&LC) representative organizations/movements and networks

B) Other civil society organizations and networks
C) Specialist organizations (e.g. research organisations/institutions, etc)
D) Alliances
a) Financial sector stakeholders that allocate capital and hold shares;
b) Companies with substantial influence throughout global supply chains;
c) Policy makers that set the regulatory frameworks for supply chains and finance; and
d) Chinese market stakeholders
e) Institutional, Corporate, Private donors

General needs
The solution offered and established must address the following overall/general needs.

Contact Management: RFN requires a contact management system that allows us to collect, store and act on data from partners, leads, customers, donors and other key stakeholders (to be further defined). A centralized location, and unified view of associated accounts, opportunities, sectors, notes and communication history are essential. The solution must allow for different flows of approval and information collection for specified categories of contacts/partnerships (e.g. approving potential partnerships and different due diligence and contracting protocols for each category).

Document management: RFN requires a system that allows document storage linked to different contact units, with different types of mandatory metadata (e.g. contracts, budgets, plans, reports, notes, etc.). Ideally, these documents should be viewable in the profile for each contact as well as sortable per category/type of document. An area for templates storage/use is also desired (e.g. contract templates). The solution should be integrated with other RFN systems (finance management, accounting etc.)

Communication Management: RFN requires a tool to streamline communication with partners and stakeholders. Currently, multiple RFN points of contact engage with various representatives from partner organizations. A solution is needed to centralize and manage these interactions.

Monitoring and reporting: RFN needs a planning tool to support monitoring and reporting on selected indicators, both qualitative and quantitative. Functionality which allows for the creation of Logical Frameworks (“LogFrames”) or similar is desirable.

Dashboards and Analytics: RFN needs a tool to support data analysis and create visualizations of key statistics.

<The below is a tentative requirements list formulated as short user stories – will be completed for step 2 of the competition:>

No.	Requirement / user story
1	As a DFM or Marketing team member doing corporate engagement, I need to create and maintain an overview of the different companies I am speaking with.
2	As a supply chain adviser in the DFM team or a key Account Manager in the Marketing team I need to sort and arrange groups of companies based on several common denominators such as ‘industry’, ‘commodity’ or ‘value chain segment’ or ‘sector’ to get an overview of stakeholder interactions within a given category. As a Team Leader in one of RFN’s country teams, I need to sort and arrange groups of partners within my country based on several common denominators such as 'type of partner’, ‘Partner Assessment Tool score’ or ‘thematic work area’ to get an overview of partner engagement within a given category.
3	As a supply chain adviser in the DFM team or a Key Account Manager in the Marketing team, I need to maintain an overview of the networks and coalitions I am working with, and which organizations are participating in these coalitions. As a Team Leader of one of RFN’s country teams, I would like to keep track of the networks and coalitions our team’s partners are involved with, to get a better picture of the relationships between stakeholders.
4	As a DFM or Marketing team member, I need a tool to manage groups of organizations collaboratively.
5	As a DFM or Marketing team member doing corporate engagement, I need to get an overview of the last point of contact with the companies I am speaking with and see the conversation history with that stakeholder. As a thematic adviser or grant manager on one of RFN’s country teams, I need to get an overview of the last point of contact with the partner organizations I’m responsible for and see the conversation history and documents linked with each partner.
6	As a DFM or Marketing team leader I would like to assign a dedicated point of contact in the team to each of the external stakeholders we communicate with. This contact point should be clearly represented in the CRM. As a Team Leader of one of RFN’s country teams, I need to assign a dedicated point of contact (thematic adviser/grant manager) within our team for each partner we communicate with. This primary contact should be clearly visible within the CRM.
7	As a DFM or Marketing team member, I would like to have a seamless integration between email communication, Teams meeting notes, follow-up points and the CRM system.

8	As a DFM or Marketing team member, I would like to create and send newsletters to external stakeholders.
9	As a DFM or Marketing team member I would like to perform data analysis and make visualizations of key statistics that show how the team interacts with external stakeholders. As a Program Cycle and Partnership Management Advisor, I would like to perform data analysis and make visualizations of key statistics of RFN's partnerships and projects that show how we engage with partners and makes accessible to the whole organization, information which aids in further strategic engagement.
10	As a DFM or Marketing team member, I would like to use the CRM system for campaign coordination and outreach. When the team launches a campaign, we need a tool that can facilitate systematic planning of who to reach out to, with what information, and when. I would like there to be a dedicated page for each campaign, which allows progress tracking across various stakeholders.
11	As an adviser on sustainable finance, I would like to track the engagement progress of the investor collaborative engagements I work on.
12	As a DFM or Marketing team member, I would like to arrange company profiles into corporate hierarchies so that I can differentiate between parent companies and subsidiaries.
13	As a Senior Results Management Advisor, I need to enable the input of project, program and organizational monitoring and reporting frameworks (i.e. LogFrames).
14	As a Senior Results Management Advisor, I need to enable real-time tracking of progress against indicator targets so that Programmes Advisors can make timely decisions and course corrections.
15	As a Senior Results Management Advisor, I need to allow aggregation of results across multiple projects and programs so that we can assess performance at portfolio and organizational levels.
16	As a Senior Results Management Advisor, I need to support advisers on monitoring, evaluation, accountability and learning (MEAL) in disaggregating indicator data by sex, age, and location so that they can assess inclusivity in project outcomes.
17	As a Senior Results Management Advisor, I need to ensure that means of verification for each indicator are properly stored and accessible so that teams can validate reported data during reviews or audits.
18	As a Senior Results Management Advisor, I need dashboards to provide clear overviews of project performance so that I can support Programmes Advisors in tracking and communicating progress.
19	As a Senior Results Management Advisor, I need user roles and permissions to reflect the different access needs of MEL Advisors, Thematic Advisors, Finance Advisors, and Project Partners
20	As a Senior Results Management Advisor, I need to ensure that results data can be linked with financial systems so that I can support analysis of the value for money and resource use in Programme delivery.

21	As a Senior Results Management Advisor, I need audit trails and indicator changes to uphold data accountability.
22	As a Senior Results Management Advisor, I need to ensure that MEAL and Program teams can generate customized reports based on donors and internal requirements so that reporting processes are efficient and standardized.
23	As a Senior Results Management Advisor, I would like to ensure that RFN staff have an easily accessible “results dashboard” where our key performance indicators can be shared with all staff and our Board for strategic use.
24	As a MEL adviser or Finance adviser on one of RFN’s country teams, I need to be able to track the capacity strengthening progress of the partner organizations that my team supports.
25	As a potential point of contact for a partner (either within the Advocacy Department or Programmes Department), I would like to be able to initiate a process within the CRM which takes me through an approval flow of that potential partner and based on my input to a partner information form, outlines what kind of due diligence assessment and contracting package is required for that category of partnership.
26	As a thematic adviser or grant manager on one of RFN’s country teams, I need to be able to upload/access documents related to different partners and assign different metadata to those documents so that they can be sortable based on, for example, project number, type of contract document, year, partner, etc.).
27	As a thematic advisor or grant manager on one of RFN’s country teams, I need to be able to access the correct contract and due diligence process templates so that I can easily create versions of these (without editing the original template document) and save them in the system.
28	As a thematic advisor or grant manager on one of RFN’s country teams, I need to be able to see the difference between the versions of different contract documents. For example, which ones have been signed as part of the contract, and which ones are currently being worked on with partners.
29	As a member of the Finance team, I need integration and regular sync between Visma and CRM with Partner, Project and Donors **master data**. Visma should serve as the master system, and all updates made in Visma must be automatically reflected in the CRM. However, selected fields, such as contact person or other CRM-specific information can be edited directly within the CRM. We would like to have an overview of institutional and government **funds** received, as well as funds transferred from RFN to partners. Both sets of data can be extracted from Visma.net.
30	As a member of the Finance team, I need a **clear structure** and, ideally, mandatory metadata fields that must be completed when saving documents to ensure consistency and organization. The core metadata should include projects (with project owner), partners, and donors, as defined by the master data in Visma. Some metadata should follow automatically when filling in project number (as project name, partner and donor/grant). In addition, other metadata fields such as Year, Responsible, Class, and Document Type must also be available.

	It must be easy to retrieve documents, with full-text search in document content and metadata, and the ability to filter by, for example, project, year, responsible and document type. We also need to easy access/gather relevant document **per project** in CRM
31	As a member of Finance team and controller, it is essential to maintain **version history** to meet the requirements of external auditors and donors, ensure internal traceability, and reduce the risk of errors or loss of critical information in collaboration with partner organizations. This includes, version number, data and time of upload change, user id or name of the person who made the change and an optional comments field. Ensure regular users cannot delete or overwrite version history.
32	As a member of Finance team and controller, we need to document and follow up on **non-compliance** cases. This can be managed either through a dedicated case module or by using specific categories/tags within the CRM system. Most cases require strict confidentiality and must support role-based access, hidden fields, and secure storage. Each case and related document should have a complete history and change log. It must also be possible to grant access to relevant personnel across the organization, based on their roles. It would also be beneficial to have automated follow-ups or alerts for deadlines, assigned actions, and case closures. Additionally, the ability to generate aggregated reports for management or the board would support better oversight and strategic follow-up.

The Agreement's clause 3.4 Documentation and training

Technical documentation may be made available in English.

User documentation provided must be made available in English.

Technical documentation

- Systems documentation with a detailed description of the standard system and the customisations, the manner of operation and the relationship between these
- Installation Guide with advice on choosing set-up, etc.

User documentation

- Description of the functionality of the standard system and the customisations
- Super-user/system administrator descriptions of the user organisation that demonstrate the linkages between different parts of the system, advanced user functionality, etc.

The documentation must be updated to match the delivered version of the standard system and the customisations. The documentation of the customisations must refer to relevant parts of the documentation of the standard system, so that the various parts of the documentation can easily be related to each other. It must be clearly and unequivocally specified which parts of the documentation of the standard system, if any, are not relevant as a consequence of the customisations made, as well as what, if anything, replaces such obsolete documentation.

Agreed training of the Customer's employees must take place professionally and to good professional and educational standards within the time schedule specified in Appendix 3. The training must be matched to the individual user groups' needs, e.g. end-users, super-users, system administrators and similar.

Clause 3.5 of the Agreement Upgrading/maintenance of the service after the delivery date

No changes or additions to clause 3.5.

Clause 3.6 of the Agreement Further development after the delivery date

The Supplier must continuously and proactively assess and propose changes to its own services for the Customer.

Any development of additional functionality and/or adaptations after the delivery date will be subject to separate additional agreements.

Clause 6.1 of the Agreement Information security

No changes or additions to clause 6.1.

Clause 6.2 of the Agreement Personal data

No changes or additions to clause 6.2.

Clause 7.1 of the Agreement The rights of the parties

No changes or additions to clause 7.1.

Clause 8 of the Agreement Reconstruction of data

No changes or additions to clause 8.

Appendix 2: The Supplier’s description of the service

<This Appendix must be completed by the Supplier>

<Instruction/guide for how the Supplier should complete Appendix 2:
In the table below, the supplier must respond to each requirement according to the instructions given in the "Response" column (text in italics). The instructions are deleted and replaced with the supplier's response. Alternatively, the requirements can be responded to in a separate document with clear reference back to each requirement in the table.>

Clause 1.1 of the Agreement, Scope of the Agreement

If the Supplier is of the view that there are obvious errors or ambiguities in the Customer’s specification of requirements, the Supplier must point this out here.

The Supplier must not change the requirements set by the Customer. The Supplier must only complete the specification of requirements and describe its service so that the Customer can see how the Supplier will deliver the service (solution specification). Deviations from the Customer's requirements may cause the bid to be rejected by the Customer.

No.	Requirement / user story	Response *(Text in italics is instructions to the bidder in the tendering phase and is replaced with the bidder’s response)*
1	As a DFM or Marketing team member doing corporate engagement, I need to create and maintain an overview of the different companies I am speaking with.	*The bidder must describe how the requirement will be fulfilled.*
2	As a supply chain adviser in the DFM team or a key Account Manager in the Marketing team I need to sort and arrange groups of companies based on several common denominators such as ‘industry’, ‘commodity’ or ‘value chain segment’ or ‘sector’ to get an overview of stakeholder interactions within a given category. As a Team Leader in one of RFN’s country teams, I need to sort and arrange groups of partners within my country based on several common denominators such as	*The bidder must describe how the requirement will be fulfilled.*

	'type of partner', 'Partner Assessment Tool score' or 'thematic work area' to get an overview of partner engagement within a given category.	
3	As a supply chain adviser in the DFM team or a Key Account Manager in the Marketing team, I need to maintain an overview of the networks and coalitions I am working with, and which organizations are participating in these coalitions. As a Team Leader of one of RFN's country teams, I would like to keep track of the networks and coalitions our team's partners are involved with, to get a better picture of the relationships between stakeholders.	*The bidder must describe how the requirement will be fulfilled.*
4	As a DFM or Marketing team member, I need a tool to manage groups of organizations collaboratively.	*The bidder must describe how the requirement will be fulfilled.*
5	As a DFM or Marketing team member doing corporate engagement, I need to get an overview of the last point of contact with the companies I am speaking with and see the conversation history with that stakeholder. As a thematic adviser or grant manager on one of RFN's country teams, I need to get an overview of the last point of contact with the partner organizations I'm responsible for and see the conversation history and documents linked with each partner.	*The bidder must describe how the requirement will be fulfilled.*
6	As a DFM or Marketing team leader I would like to assign a dedicated point of contact in the team to each of the external stakeholders we communicate with. This contact point should be clearly represented in the CRM. As a Team Leader of one of RFN's country teams, I need to assign a dedicated point	*The bidder must describe how the requirement will be fulfilled.*

	of contact (thematic adviser/grant manager) within our team for each partner we communicate with. This primary contact should be clearly visible within the CRM.	
7	As a DFM or Marketing team member, I would like to have a seamless integration between email communication, Teams meeting notes, follow-up points and the CRM system.	*The bidder must describe how the requirement will be fulfilled.*
8	As a DFM or Marketing team member, I would like to create and send newsletters to external stakeholders.	*The bidder must describe how the requirement will be fulfilled.*
9	As a DFM or Marketing team member I would like to perform data analysis and make visualizations of key statistics that show how the team interacts with external stakeholders. As a Program Cycle and Partnership Management Advisor, I would like to perform data analysis and make visualizations of key statistics of RFN's partnerships and projects that show how we engage with partners and makes accessible to the whole organization, information which aids in further strategic engagement.	*The bidder must describe how the requirement will be fulfilled.*
10	As a DFM or Marketing team member, I would like to use the CRM system for campaign coordination and outreach. When the team launches a campaign, we need a tool that can facilitate systematic planning of who to reach out to, with what information, and when. I would like there to be a dedicated page for each campaign, which allows progress tracking across various stakeholders.	*The bidder must describe how the requirement will be fulfilled.*
11	As an adviser on sustainable finance, I would like to track the engagement progress of the investor collaborative engagements I work on.	*The bidder must describe how the requirement will be fulfilled.*

12	As a DFM or Marketing team member, I would like to arrange company profiles into corporate hierarchies so that I can differentiate between parent companies and subsidiaries.	*The bidder must describe how the requirement will be fulfilled.*
13	As a Senior Results Management Advisor, I need to enable the input of project, program and organizational monitoring and reporting frameworks (i.e. LogFrames).	*The bidder must describe how the requirement will be fulfilled.*
14	As a Senior Results Management Advisor, I need to enable real-time tracking of progress against indicator targets so that Programmes Advisors can make timely decisions and course corrections.	*The bidder must describe how the requirement will be fulfilled.*
15	As a Senior Results Management Advisor, I need to allow aggregation of results across multiple projects and programs so that we can assess performance at portfolio and organizational levels.	*The bidder must describe how the requirement will be fulfilled.*
16	As a Senior Results Management Advisor, I need to support advisers on monitoring, evaluation, accountability and learning (MEAL) in disaggregating indicator data by sex, age, and location so that they can assess inclusivity in project outcomes.	*The bidder must describe how the requirement will be fulfilled.*
17	As a Senior Results Management Advisor, I need to ensure that means of verification for each indicator are properly stored and accessible so that teams can validate reported data during reviews or audits.	*The bidder must describe how the requirement will be fulfilled.*
18	As a Senior Results Management Advisor, I need dashboards to provide clear overviews of project performance so that I can support Programmes Advisors in tracking and communicating progress.	*The bidder must describe how the requirement will be fulfilled.*
19	As a Senior Results Management Advisor, I need user roles and permissions to reflect the different access needs of MEL Advisors, Thematic Advisors, Finance Advisors, and Project Partners	*The bidder must describe how the requirement will be fulfilled.*
20	As a Senior Results Management Advisor, I need to ensure that results data can be linked with financial systems so that I can	*The bidder must describe how the requirement will be fulfilled.*

	support analysis of the value for money and resource use in Programme delivery.	
21	As a Senior Results Management Advisor, I need audit trails and indicator changes to uphold data accountability.	*The bidder must describe how the requirement will be fulfilled.*
22	As a Senior Results Management Advisor, I need to ensure that MEAL and Program teams can generate customized reports based on donors and internal requirements so that reporting processes are efficient and standardized.	*The bidder must describe how the requirement will be fulfilled.*
23	As a Senior Results Management Advisor, I would like to ensure that RFN staff have an easily accessible “results dashboard” where our key performance indicators can be shared with all staff and our Board for strategic use.	*The bidder must describe how the requirement will be fulfilled.*
24	As a MEL adviser or Finance adviser on one of RFN’s country teams, I need to be able to track the capacity strengthening progress of the partner organizations that my team supports.	*The bidder must describe how the requirement will be fulfilled.*
25	As a potential point of contact for a partner (either within the Advocacy Department or Programmes Department), I would like to be able to initiate a process within the CRM which takes me through an approval flow of that potential partner and based on my input to a partner information form, outlines what kind of due diligence assessment and contracting package is required for that category of partnership.	*The bidder must describe how the requirement will be fulfilled.*
26	As a thematic adviser or grant manager on one of RFN’s country teams, I need to be able to upload/access documents related to different partners and assign different metadata to those documents so that they can be sortable based on, for example, project number, type of contract document, year, partner, etc.).	*The bidder must describe how the requirement will be fulfilled.*
27	As a thematic advisor or grant manager on one of RFN’s country teams, I need to be able to access the correct contract	*The bidder must describe how the requirement will be fulfilled.*

	and due diligence process templates so that I can easily create versions of these (without editing the original template document) and save them in the system.	
28	As a thematic advisor or grant manager on one of RFN's country teams, I need to be able to see the difference between the versions of different contract documents. For example, which ones have been signed as part of the contract, and which ones are currently being worked on with partners.	*The bidder must describe how the requirement will be fulfilled.*
29	As a member of the Finance team, I need integration and regular sync between Visma and CRM with Partner, Project and Donors **master data**. Visma should serve as the master system, and all updates made in Visma must be automatically reflected in the CRM. However, selected fields, such as contact person or other CRM-specific information can be edited directly within the CRM. We would like to have an overview of institutional and government **funds** received, as well as funds transferred from RFN to partners. Both sets of data can be extracted from Visma.net.	*The bidder must describe how the requirement will be fulfilled.*
30	As a member of the Finance team, I need a **clear structure** and, ideally, mandatory metadata fields that must be completed when saving documents to ensure consistency and organization. The core metadata should include projects (with project owner), partners, and donors, as defined by the master data in Visma. Some metadata should follow automatically when filling in project number (as project name, partner and donor/grant). In addition, other metadata fields such as Year, Responsible, Class, and Document Type must also be available. It must be easy to retrieve documents, with full-text search in document content and metadata, and the ability to filter by, for example, project, year, responsible and document type. We also need to easy access/gather relevant document **per project** in CRM	*The bidder must describe how the requirement will be fulfilled.*

31	As a member of Finance team and controller, it is essential to maintain **version history** to meet the requirements of external auditors and donors, ensure internal traceability, and reduce the risk of errors or loss of critical information in collaboration with partner organizations. This includes, version number, data and time of upload change, user id or name of the person who made the change and an optional comments field. Ensure regular users cannot delete or overwrite version history.	*The bidder must describe how the requirement will be fulfilled.*
32	As a member of Finance team and controller, we need to document and follow up on **non-compliance** cases. This can be managed either through a dedicated case module or by using specific categories/tags within the CRM system. Most cases require strict confidentiality and must support role-based access, hidden fields, and secure storage. Each case and related document should have a complete history and change log. It must also be possible to grant access to relevant personnel across the organization, based on their roles. It would also be beneficial to have automated follow-ups or alerts for deadlines, assigned actions, and case closures. Additionally, the ability to generate aggregated reports for management or the board would support better oversight and strategic follow-up.	*The bidder must describe how the requirement will be fulfilled.*

Clause 2.1 of the Agreement The service

<On the basis of Appendix 1 (the Customer's specification of requirements), the Supplier must describe his service here. The Supplier must also describe the requirements that may be made of the Customer's technical platform in order for the Customer to be able to use the service. The Supplier must provide information to the Customer if the Customer's technical platform/operating environment needs to be upgraded in order for the Supplier's service to be able to function.>

Clause 6.2 of the Agreement Personal data

<If, in the performance of the service, the Supplier is to process personal data, the Supplier must describe how satisfactory processing in line with the personal data protection regulations will be achieved and performed here.

If personal data in connection with the performance of the assignment is to be transferred to countries outside the EEA area, the Supplier must refer to the relevant transfer basis (the legal authority for transfer to abroad) and to documentation showing that that the terms for apransfer basis are fulfilled.

The relevant transfer basis may be the EU's standard contracts/EU model agreements or binding corporate rules.

The Supplier will attach a draft of a data processor agreement as an attachment to Appendix 2.>

Clause 7.1 of the Agreement The rights of the parties

No changes or additions to clause 7.1.

Clause 8 of the Agreement Reconstruction of data

No changes or additions to clause 8.

Appendix 3: Plan for the establishment phase

Clause 3.1 of the Agreement Plan for the establishment phase

The parties will cooperate on drawing up a plan for the establishment phase. The final plan is attached by the Customer when it has been prepared (after contract signing).

Clause 3.2 of the Agreement Delivery deadline and delivery notification

The deadline is to be determined with the selected Supplier prior to contract signing.

Clause 3.3 of the Agreement Approval testing and delivery day

No changes or additions to clause 3.3.

The Agreement's clause 3.4 Documentation and training

No changes or additions to clause 3.4.

Clause 3.6 of the Agreement Further development after the delivery date

No changes or additions to clause 3.6.

Clause 9.2.3 of the Agreement Liquidated damages in the event of delay

No changes or additions to clause 9.2.3.

Appendix 4: Service level with standardised damages

Clause 2.1 of the Agreement

The Customer wishes to use the Supplier's standard service level agreement as the basis for the service. Defined service level/compensation will be used as an award criterion.

<Here, the Supplier must add its standard service agreement. I should, as a minimum, include description of service uptime, operation, user support and/or maintenance.>

Appendix 5: Administrative provisions

This Appendix is used to list all of the administrative routines for the contractual relationship and cooperation between the parties.

Clause 1.5 of the Agreement The representatives of the parties

On behalf of the Customer:	**On behalf of the Supplier:**
Name:	Name:
Position:	Position:
Telephone:	Telephone:
Email:	Email:

Clause 5.1 of the Agreement Duration

No changes or additions to clause 5.1.

Clause 5.2 of the Agreement Cancellation

No changes or additions to clause 5.2.

Clause 6.2 of the Agreement Personal data

<Complete with names of any verified subcontractors>

Clause 11.2 of the Agreement Pay and working conditions

No changes or additions to clause 11.2.

Clause 11.4 of the Agreement Form of written communication

No changes or additions to clause 11.4.

Appendix 6: Total price and pricing provisions

All prices and detailed terms and conditions for the consideration that the Customer shall pay for the Supplier's services are set out in full in this Appendix 6. Costs, consideration and price elements that are not priced separately, clearly and unambiguously shall be deemed to be included in the prices stated in this Appendix 6.

Solution

The pricing model (including which factors affect the pricing) and prices for relevant MS Dynamics 365 deliveries and any other solution deliveries shall be stated in a separate attachment to Appendix 6.

<The supplier completes the attachment to Appendix 6 as part of the offer.>

The supplier's regular hourly rates:

The following sub-services/activities shall be delivered and invoiced according to the time spent:

- Training (ref. Clause 3.4 of the Agreement)
- Assistance in connection with facilitating use of the solution
- Any customer-specific adaptations of the solution/integrations
- Any further development after the Delivery Date (ref. Clause 3.6 of the Agreement)
- Consulting or other activities/service deliveries agreed with the Customer
- Assistance in connection with the parties' obligations during the termination period (ref. Clause 5.3 of the Agreement)

Consultant category	Description	Hourly rate excl. VAT
1 (Junior consultant)	0-3 years of relevant experience	
2 (Senior consultant)	Minimum 3 years of relevant experience and relevant formal qualifications (education/certification)	
3 (Manager)	Minimum 5 years of relevant experience and relevant formal qualifications (education/certification)	
4 (Project manager, specialist)	Minimum 8 years of relevant experience and relevant formal qualifications (education/certification) + role as project manager and/or resource with specialist expertise.	

Clause 3.4 of the Agreement Documentation and training

No changes or additions to clause 3.4.

Training is agreed between the parties and is carried out for an hourly fee.

Clause 3.5 of the Agreement Upgrading of the service after the delivery date

No changes or additions to clause 3.5.

Clause 3.6 of the Agreement Further development after the delivery date

No changes or additions to clause 3.6.

Clause 4.2 of the Agreement Invoicing dates and payment terms

No changes or additions to clause 4.2.

Clause 4.5 of the Agreement Price adjustments

No changes or additions to clause 4.5.

Clause 5.2 of the Agreement Cancellation

No changes or additions to clause 5.2.

Clause 5.3 of the Agreement The parties' obligations during the notice period

No changes or additions to clause 5.3.

Clause 8 of the Agreement Reconstruction of data

No changes or additions to clause 8.

Appendix 7: Changes to the general contractual wording

Clause 1.3 of the Agreement Interpretation – Ranking

No changes or additions to clause 1.3.

Appendix 8: Changes to the service after the establishment of the Agreement

Clause 1.4 of the Agreement Changes to the service after the establishment of the Agreement

If the Customer and the Supplier have reached agreement on a change agreement (both in relation to the content, any change in consideration and change of time schedule), the change (content, adjusted consideration and adjusted time schedule) must be stated here.

Each amendment must be signed by the authorised representatives of the parties.

Change directory:

Change number	Description of the change and any adjustment of the consideration and adjustment of the time schedule	Effective date

Appendix 9: Terms for the Customer's access to and use of third-party deliverables

Clause 2.2 of the Agreement The responsibility of the Supplier for third party deliverables

<To the extent that third party deliverables are included in the services provided by the Supplier, a copy of the terms and conditions governing the Customer's access to and use of the third party deliverables shall be attached here. Alternatively, the Supplier may provide a link to the terms and conditions here. The terms and conditions are binding on the Customer.>

Third party deliverables:

Third party	Brief description of the service provided by the third party	Reference to terms and conditions that are binding on the customer (can be a link)

< The Supplier shall here, as best as can be expected of a professional supplier, describe what obligations the terms and conditions impose on the Customer and what limitations of liability the third party reserves. This shall not be unreasonably burdensome for the Supplier and must be adapted to the complexity of the individual delivery. It must also be adapted to the individual third-party delivery and how critical/risky it is in the delivery. The Supplier shall specifically point out to what extent and in which situations the third party will carry out error correction, as well as which guarantees and SLA requirements apply. It is also important to point out any unusual or burdensome regulations.>