

REQUIREMENTS – TENDER FOR DEVELOPMENT OF WEBSITE AND CMS FOR THE NORTH SEA REGION PROGRAMME

These specifications apply to the North Sea Region Programme's call for tender of a contract for procuring of the development of a website and CMS for the North Sea Region Programme under the Public Procurement Directive (Directive 2004/18) according to the contract notice published on 13th of June in the Official Journal of the European Union/TED (Tenders electronic daily).

The call for tender is completed as a public procedure, and that implies that any person may submit a tender.

A contracting authority is responsible for a completion in compliance with the EU public procurement rules, and that the basic principles of transparency and equal treatment are observed during the procurement procedure. A tenderer must expect that a contracting authority will reject a tender that is defective or faulty. A tenderer bears the risk that its tender is submitted in compliance with the EU public procurement rules.

1. Background

1.1 European Territorial Cooperation

European Territorial Cooperation (ETC) is an objective of the European Union Cohesion Policy. ETC programmes are implemented jointly by 2 or more Member States, in some cases also in cooperation with third countries (candidate or potential candidate or ENI countries, etc.). ETC programmes are co-financed by the European Union via the European Regional Development Fund and therefore, are subject to European Regional Development Fund (ERDF), Programme and national rules. The main goal of the ETC is to support territorial development and cooperation between Member States and regions.

1.2 The North Sea Region Programme

The Interreg VB North Sea Region Programme is an ETC programme running from 2014 to 2020. It is one of 13 transnational co-operation programmes in the EU. The North Sea Region Programme 2014-2020 will be the fifth transnational cooperation programme to be funded by ERDF in the North Sea Region covering regions in the European member states Denmark, Germany, the Netherlands, Sweden, the United Kingdom, and the Flemish region of Belgium and the non-member state Norway.

The programme is managed jointly by the seven countries participating in the programme. All seven countries are represented in the Monitoring Committee (MC), which deals with the overall management of the programme. Likewise the seven countries are represented in the Steering Committee (SC), which is where projects are assessed and decided on. In addition to the MC and SC, programme implementation is supported by 4 management and control organisations: Managing Authority (MA), Certifying Authority (CA), Audit Authority (AA), and Joint Secretariat (JS). Most of tasks regarding the daily management of the

programme have been delegated to the JS, which is located in Viborg, Denmark. The JS is hosted by the Central Denmark Region. In accordance with the principle of separation of tasks, the CA, which is also located in Viborg, certifies all payments and manages programme bank accounts and accounting. Close cooperation of all these bodies is required.

As a consequence to the complex management structure of the programme as well as the wide geographical scope of the programme, the programme caters to a complex target group. Besides the above-mentioned stakeholders, the target group consists of potential beneficiaries (eg. regional authorities, the private sector and educational institutions) and current beneficiaries involved in one or several projects with the North Sea Region Programme. The different target groups have different agendas as well as different needs for information.

The working language of the programme is English.

1.3 The website and CMS

The communication landscape has undergone considerable changes since 2006-2007, when the current North Sea Region Programme (Programme) platforms for communications were established. The current North Sea Region website (www.northsearegion.eu) has been online since 2007 and has been modified and expanded upon throughout the IVB programming period. For background on the current status of programme communications as well as lessons learned, please refer to annex 4.

The current website will have to be active in parallel to the new website during a period of overlap, and when the current website no longer has a practical function for daily work, it should be used as an archive. The new website should then take over the domain name www.northsearegion.eu.

The IIB North Sea Region Programme website and final results are still accessible through the current programme website. The final results should still be accessible through the new website, but the IIB website can be closed.

1.4 Integration with programme's online monitoring system

The CMS needs to be linked with the programme's online monitoring system. Users to the online monitoring system should be able to log in via the programme website. Please refer to annex 5 and 6 for further information on the linkages and information flows between the structures.

As the two systems have detailed linkages, it is crucial that the service provider for the website and CMS cooperates with the developer of the online monitoring system. The Joint Secretariat will facilitate this process via one initial, joint meeting between the JS and the OMS and website/ CMS providers at the secretariat premises in Viborg, Denmark. Further cooperation is anticipated to be in the form of 2-3 conference calls or video conferences and email correspondence.

1.5 Training

The developer must also devise a training plan to ensure that relevant JS staff is trained accordingly and to the relevant degree. A one-day training of relevant JS staff on the CMS and interface is expected upon delivery of the website and CMS. The training should be sufficiently in depth to provide the staff with skills to maintain and work with the website on a daily basis.

A webmaster's technical and administrative manual as well as a Content Management Systems Manual must be developed.

2. Concepts and core functionalities

The overall web solution desired combines a modern and visually appealing website with a flexible and user friendly CMS and designated webspaces for each North Sea Region Programme project (project websites hosted by the programme).

The details are described in the following sections, while this first section describes the overall guiding principles of the setup.

2.1 General requirements

- **Software:** The website and Content Management System (CMS) should be developed using Open Source software
- **Responsive interface design:** The website interface needs to work on different media and hardware, i.e. pcs, mobile applications and other hand held devices
- **Visibility and Accessibility:** The site should have high visibility through clear and descriptive menu titles and be easy to find via all major search engines.
- **Compatibility:** The website must adhere to xhtml standards and proper CSS coding standards to facilitate cross browser compatibility.
- **The Content Management System (CMS)** should have a user-friendly interface for non-webmasters to update the site with minimum IT skills.

2.2 Interconnectivity

Interconnectivity between the website CMS, the individual project webspaces, and the Online Monitoring System (OMS), will be a key functionality to enable up to date and relevant information to be published, displayed and communicated on the website and project webspaces.

The web solution must enable

1. sections, modules or specific items of information such as data, files, pictures and videos, to be transferred between the programme CMS, the OMS and the project CMS as relevant
2. abovementioned information to be automatically or manually transferred, as pre-programmed or manually selected, by groups or collation or per single item
3. interconnectivity between programme CMS, project CMS and OMS to enable information from project webspaces to be transferred to Programme CMS for archiving and publication on
4. Programme website programme CMS option to interconnect with external platforms commonly used to store and structure information such as pictures and videos.
5. programme CMS option to connect to and transfer information, import and export, as above stated under points 1-3, to other external CMS structures and relevant related platforms and systems

Please refer to annex 6 for an overview of interconnectivity and information flows between structures.

2.3 Usability

The website, the CMS and the project webspaces should be easy to use and navigate. A simple and modern design is desired to make it easy to find relevant information by a minimal number of clicks.

On any page of the programme website or project webpage, the user will have one-click access to

1. The programme homepage
2. The main menu of the programme website or project webpage
3. Share page on social media
4. Print the page
5. Share the page by email
6. Search

Anywhere in the CMS system, the user must be able to:

1. Access main dashboard
2. Report a problem to the service provider with a screen dump.

Usability also entails easy login for system users. The login functionalities should be integrated and developed in cooperation with the contractor for the OMS, since there should be only one login for both systems. Requirements for login are described in the requirements for the OMS.

2.4 Flexibility

The web solution must be flexible, meaning that it must be easy to add pages, users, functions etc and change eg. names of menu titles on the website as the programme evolves and new ideas and technologies arise. As an example, a training section is expected to be added to the website at a later stage.

The flexibility should not solely depend on the service provider. Rather, Joint Secretariat staff should be able to add and alter minor things, such as adding pages, menus and submenus, independent of the developer.

Flexibility is mainly needed for the programme website. Although project webspaces are foreseen to have a standard layout and structure, projects should still have the possibility to add pages and menus to their site as well as add their own visual touch.

3. CMS

The content management system (CMS) will be the backbone of the website and hub between the general interface of the website, the user specific interfaces as determined by user specific account settings and functionalities and all back-office structures relevant to archive, store and structure material and information for publication on the website or further transfer to other internal or external systems and structures, as described in section 2.2: Interconnectivity.

3.1 General requirements

The CMS of the website must be developed

1. using a widely recognised open source structure and platform, which has the capability to integrate and function rationally in a user friendly, efficient and relevant capacity with the OMS and other relevant platforms and structures also in development
2. using a highly user friendly platform, which is module based and has the capability to be expanded as the needs and specifications for the website and CMS change over the programming period
3. using a platform and structure, which allows for all content put into and transferred onto the CMS to be easily collated and exported to other platforms and structures, should this be necessary for legal or technical reasons, or the platform be deemed insufficient or not relevant at any time
4. to incorporate a system, which has a spam control functionality for submissions from external sources, i.e. transferred information or items from project CMS or submissions by logged in users or in the users area or section
5. to allow for minimum 30 users with administrative rights to set up user accounts with full access to all sections of the CMS to allow for an unlimited number of users to set up accounts via the website interface to create accounts or type user areas with limited access to specific sections of the CMS
6. to allow for a minimum of 100 project webspaces to be connected to the programme CMS in a relevant fashion to extract and transfer information to and from the CMS for subsequent publication on the website

to allow for user areas and specific interfaces to appear in the interface once logged in, to be accredited and managed via a user friendly back office interface in the CMS. examples of such user groups would be

- Joint Secretariat (JS) staff
- Managing authority (MA)
- Audit authorities and financial control users
- Monitoring (MC) and steering committee (SC) members

- Project representatives
- General users

Furthermore, the following requirements must be adhered to:

7. All content must as a minimum be sortable by date and searchable by free text.
8. Project uploads and updates (news updates, upload of photos, reports, events, etc) must be sortable by date and by project
9. All content, eg. events, news stories, documents and files should be easily published/unpublished by Joint Secretariat administrators, whether uploaded by the programme or by projects.
10. It must be possible to click a “report problem” button from anywhere in the system. The button generates a contact template to the system developer including screen dump of the issue at hand. (Note: This function is also a part of the requirements for the OMS tender).
11. The programme CMS should include a project CMS (basically a limited area of the programme CMS, as described in section 5: Project Webspaces).

3.2 Dashboard

The CMS must have a dashboard, which allows Joint Secretariat staff to see web statistics overview, as minimum:

1. See list of projects who haven't updated their webspace in the past month
2. Generate and send reminder email to projects, which haven't updated their webspace the past month
3. Access the OMS My DashBoard for JS users with one click
4. Personalise content of dashboard depending on the needs of the specific JS user

4. Website

4.1 General requirements

The website is foreseen to be the main interface for programme communication and information, and the main entry point for communication related to the projects of the programme. A key functionality of the website will be to act as a platform for collected project news, communication and information.

The website must:

1. Allow CMS entries to be displayed on the front end / main interface as entered into the CMS directly or as transferred from other external sources as described under section 2.2: Interconnectivity.
2. Have an interface, which is flexible and allows for 'personalised' display of the interface, as determined by log in and account functionalities to users to set up accounts according to groups of users, with different levels of access display a user friendly log-in page
3. Have a flexible and modular interface which allows the administrator to change the interface look and front end functionalities
4. Have the functionality of links and sections, including sub-links and sub-sections, in the interface, which directs the users to all relevant parts of the front of the website as published from the CMS of the website or as transferred from external sources as described in section 2.2: Interconnectivity, and then published from the website CMS, in any fashion as determined most relevant, i.e. clickable links, texts, pictures, logos or other symbols
5. Have RSS feed

4.2 Design and layout

The programme envisions a modern and user friendly website. The design and layout should be in line with the programme's overall corporate design, which is being developed in the framework of another contract.

The Joint Secretariat will keep the selected service provider informed and up-to-date about the development of the corporate design.

Generally a visually appealing and approachable, although not overly simplistic approach is preferred. The use of infographics and similar visual tools to provide users with a quick overview and understanding is desirable when relevant.

4.3 Website content

The following content must be on the programme website, but alternative structures are welcome if justified.

4.3.1 News

The website must display programme and project news stories, including:

1. Programme news drafted and published by the Joint Secretariat staff in the programme CMS
2. Project news drafted in the project CMS and published by project lead beneficiaries on their project webspaces and automatically shown on the programme news page as well
3. Vacancies at the Joint Secretariat drafted and published by the Joint Secretariat staff in the programme CMS
4. Recent social media updates on project and programme levels

4.3.1 About

The website must include a section, which provides the user with background information about the programme, its strategy, priorities, FAQs and the framework in which the programme exists.

The information will mainly be text-based (but may include photos, links, videos and graphics) and divided across a number of submenus, which due to the flexible set up will be possible to add and alter at a later stage by Joint Secretariat staff.

4.3.3 Project Life Cycle Section

The North Sea Region Programme website should feature a project life cycle section, which graphically illustrates the life cycle of a North Sea Region Programme project and provides relevant information for each of the steps of the cycle.

The project life cycle section must contain as a minimum:

1. A main page with a graphic illustration of the stages of a North Sea Region Programme project:
 - a. Background
 - b. Project ideas
 - c. Project development
 - d. Pre-assessment
 - e. Application
 - f. Implementation and reporting

- g. Closure
 - h. Future perspectives
2. Sub pages for each of the stages of the project cycle:
- a. Background
 - b. Project ideas
 - c. Project development
 - d. Pre-assessment
 - e. Application
 - f. Implementation and reporting
 - g. Closure
 - h. Future perspectives

The sub pages will contain written text as well as links to relevant documents, training videos and other uploaded files and web links.

3. Links between the illustrated stages of the project life cycle on the main project life cycle page and the sub-pages for each of the stages.
4. On each sub-page, a link to any of the other sub-pages of the project life cycle illustrated graphically as well as a link to the main project life cycle page.

4.3.4 Project Section

The website must contain a project section, which provides stakeholders with relevant and targeted information on project and priority level.

The project section should draw data from the OMS and individual project webspaces as indicated in detail below.

The project section must as a minimum have:

1. A visually appealing frontpage, which serves as an entry to learn more about the programme's projects. The frontpage must
 - a. Show latest uploaded project photos (from project webspaces)
 - b. Show latest project news (from project webspaces and social media channels)
 - c. Use infographics to give an overview of aims and expected impacts on project and priority levels

- d. Show latest project videos
2. A search function (displayed on the project section frontpage), which allows users to search by
 - a. Priority
 - b. Area of intervention
 - c. Regions
 - d. Budget
 - e. Typed keywords (free text)
3. The option to export any search generated list of projects to excel or pdf or equivalent
4. Information on the specific projects:
 - a. Short introduction to project, ie challenges addressed, results sought, selected methodology, etc.
 - b. Link to projects' individual webspace

The factual information stated in points 2 a-d is drawn from the OMS, whereas news, events, etc. is drawn from the project webspaces.

The project section could display project data geographically as described in the requirements to the OMS item 60 – but other suggestions for a visual approach are welcome as well.

4.3.5 Project Applications

The website should have a project applications section, which as a minimum:

1. Has a page describing the application procedure
2. Presents the current call for applications (if any are open) in text and link to relevant files
3. Links to the application form in the OMS

4.3.6 Project Idea and Partner Search Section

In the future, potential beneficiaries interested in submitting a project idea for an open call for applications will do so through a form in the new OMS.

The form will be accessible through the programme website's project idea and partner search section and will include a description of the envisioned project as well as contact details of the potential beneficiary, so that other beneficiaries are able to make contact and discuss possible cooperation.

Submitted project ideas are stored in the OMS, but published on the programme website's project idea and partner search section.

The website should only display project ideas for the open call for applications. All project ideas related to closed calls for applications should be automatically removed from the section to avoid confusion.

4.3.7 Event Section

The North Sea Region Programme website must have an events section, which as a minimum:

1. Displays events in a visual, monthly, calendar view
 - a. Programme events uploaded by the Joint Secretariat through the CMS
 - b. Project events drawn from calendars on project webspaces
2. Allows users to learn more about specific events by clicking a calendar item and being directed to a page with more detailed information (text, uploaded document, promotional video, link to further information, etc)
3. Allows existing users of the OMS as well as new users to login to register
 - a. Existing users of the OMS enter event registration through the OMS My DashBoard.
 - b. New users not currently involved in a project create an account through the website, entering name, organization, address and contact details.
4. Allows users to register for events by filling in and submitting registration forms
 - a. Registration forms are created in the programme CMS with the fields required for a specific event
 - b. New registration forms can be created from scratch or by copying and editing a previously used form.
 - c. Registration forms can contain both mandatory and non mandatory fields and has pattern checks. for eg. correct email format.
 - d. Contact details of existing users are automatically filled in with information from the OMS.
 - e. Contact details of new users are automatically transferred to the contact database of the OMS as stated in the requirements for the OMS item 207.
5. Sends automatic message to registrants when registration is received in the OMS
6. Allows Joint Secretariat users to export data to excel and pdf formats or equivalent.

4.3.8 Document Library

The North Sea Region Programme website must have a document library, which as a minimum

1. Allow users to search relevant documents by category:
 - a. Project information by project stage
 - i. Background
 - ii. Project ideas
 - iii. Project development
 - iv. Pre-assessment
 - v. Application
 - vi. Implementation and reporting
 - vii. Closure
 - viii. Future perspectives
 - b. Programme background documents
 - i. Info sheets
 - ii. Regulations
 - c. Programme publications
 - i. Ongoing evaluations
 - ii. Annual reports
 - iii. Thematic papers
 - iv. Newsletters
 - d. User relevance
 - i. Lead beneficiaries
 - ii. Finance managers
 - iii. Communication managers
 - iv. First level control
 - v. Country specific information
 - vi. National rules and procedures

2. Allows users to share documents via social media or by email
3. Allows users to print documents easily

4.3.9 Contact Section

The website must have a contact section, which as a minimum includes:

1. -Name, title, phone number and email address of all staff of the Joint Secretariat
2. Name, country, phone number and email address of all national contact points
3. The option to add a profile photo for each contact

4.3.10 Links

Besides the described content, the website should also link to other relevant programme channels and resources by use of graphical buttons, namely

1. The IVB website
2. The Programme's Project Portfolio of project results for the 2007 – 2013 programming period (currently being tested)
3. Programme's social media channels

5. Project Webspaces

Designated project webspaces for each project are envisioned as part of the overall web solution. However, this is subject to a decision by the programme's communication working group, which is pending at the time of writing.

This section describes the maximum approach possible, and the successful tenderer will describe in detail how this could be implemented, should the programme's communication working group decide to do so.

5.1 Concept

The programme will provide each project with an individual webspace that they can manage independently, but with supervision by the programme. The webspace should be provided by the programme and linked to through the back office structure.

Project websites webspaces must

1. be hosted by the programme website but have individual domain names (URLs)
2. be simple to set up through the programme CMS by Joint Secretariat staff
3. transfer information automatically from the project webspaces to the programme website, e.g. to the news and project sections of the programme website
4. be able to accommodate traffic from the OMS to the individual webspace (eg. in terms of a static project description on the About page, contact details, etc.)
5. be based on a standard design template, but with the flexibility for users to add pages and menus and make changes to the visual appearance.

5.2 Content

The standard content of each project webspace will be

1. News
 - a. Drafted and published by the projects themselves through the CMS
 - b. Accumulated through the projects' social media channels
2. About
 - a. Provides an overview of the project (standard project description automated from the OMS - see requirements to the OMS item 59)
3. Calender displaying coming events

- a. Clicking on a calendar item directs the user to a brief description of the specific event including, if relevant, a registration form similar to that described in the programme's event section
- 4. Output Library
 - a. Projects upload photos, videos, documents, presentations, etc through the OMS document centre – see requirements to the OMS item 42
- 5. Contact Section (contact details automated from the OMS)
- 6. Programme logo, which links directly to the programme website, visible on all pages of the webspace
- 7. Project logo (uploaded through the OMS) visible on all pages of the webspace, which links to the homepage of the project webspace
- 8. Any additional pages or menus the project may wish to add

5.3 Project CMS and My WebSpace Dashboard

The project lead beneficiary will be able to logon to the project webspace CMS using the same user information as he or she uses to log on to the OMS (see section 2.3: Usability).

The project CMS is basically a limited area of the programme CMS (see section 3: CMS). The frontpage of the project CMS is a user dashboard.

The dashboard must display

1. A heading entitled “My WebSpace Dashboard: (project name)”
2. A section entitled “My projects” with one-click access to other relevant project dashboards (the Lead Beneficiary might be involved in more than one project)
3. One-click access to the OMS DashBoard as described in requirements for the OMS item 57
4. An “action” section with easy links to uploading a news story, an event, photos, etc.
5. A section with 10 most recent uploads
6. A section displaying statistics, eg. list of most popular content (see section 6: Statistics Module)
7. A section displaying notifications/ reminders, which the system generates when the webspace hasn't been updated for a month. The notifications should also be sent by email to the lead beneficiary contact.

Project users should have one-click access to the dashboard from anywhere in the project CMS.

6. Statistics Module

The new North Sea Region Programme website must have a statistics module, which as a minimum:

1. Collects statistics, such as:
 - a. Number of visits
 - b. Number of unique visitors
 - c. Average visit duration
 - d. Location/ country of visitors
 - e. Visitor's browser type
 - f. Visitor device category (desktop, mobile or tablet)
 - g. Visitors' behavior on website (what is clicked in which order)
 - h. How visitors entered the website (eg by direct link, by programme's OMS, by google, etc)
 - i. Social sharing – what content is shared through which social media channels?
 - j. Most popular (clicked) content
2. Generates general and detailed reports
 - a. By selected time period (eg. day, week, month, quarter, year)
 - b. By type of data (ie the above)
3. Shows traffic between programme website and project webspaces
4. Gathers detailed statistics of project webspace traffic and displays it on project dashboards (see section 5: Project Webspaces)
5. Is flexible and adaptable to changes in the online and social media landscapes

The module can be based on freeware.