



**WORLD ORGANISATION FOR ANIMAL HEALTH**  
*Protecting animals, preserving our future*

OIE/AMU/2019

## **B. TERMS OF REFERENCE**

# **PROJECT TO SET UP THE OIE ANTIMICROBIAL USE SYSTEM (OIE AMU SYSTEM) WORLD ORGANISATION FOR ANIMAL HEALTH (OIE)**

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**Contracting authority**

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## 1. INTRODUCTION

### 1.1 OIE MANDATE

The World Organisation for Animal Health (OIE) is an intergovernmental organisation with a mandate from its 182 Member Countries to preserve animal health and animal welfare worldwide. Combatting antimicrobial resistance (AMR) is a priority issue for the OIE, recognising the vital role played by antimicrobials in human health, animal health, and animal welfare. To ensure sustainability of animal production, the efficacy of antimicrobials must be preserved through the principles of responsible and prudent use. Monitoring use of antimicrobial agents in animals allows countries to follow trends over time, and measure success of interventions.

## 2. EXECUTIVE SUMMARY

### 2.1 PROJECT BACKGROUND

Following Resolution No. 26: Combating Antimicrobial Resistance and Promoting the Prudent Use of Antimicrobial Agents in Animals, adopted by the OIE World Assembly during the 83rd General Session in May 2015, the OIE launched an annual collection of data on the use of antimicrobial agents in animals (hereafter OIE AMU data collection). This OIE activity is also in line with the Global Action Plan on AMR, and with the OIE Strategy on Antimicrobial Resistance and the Prudent Use of Antimicrobials.

There are two main components of the AMU Data Collection:

1. Antimicrobial quantities (mg)
2. Animal biomass (kg)<sup>1</sup>

### 2.2 CURRENT INFORMATION SYSTEM

There is currently no IT system in place, and everything is done manually through Microsoft Excel files and exchange of emails. Every year in September, the OIE Antimicrobial Use Team (hereafter known as the AMU Team) sends to all OIE Member Countries and non-OIE Member Countries a questionnaire (OIE Template – annex 2). This questionnaire captures quantities of antimicrobial agents used in food-producing animals using 3 reporting options (including baseline information) since countries differ in the degree to which they collect, collate and publish data on antimicrobials.

The Baseline Information sheet allows participation of all Member Countries and should be completed by all. In accordance with the level of detail of data on antimicrobial agents used in animals available in the reporting country, either the sheet labelled Reporting Option 1, or the sheet labelled Reporting Option 2 or the sheet labelled Reporting Option 3 should be completed – only one of the three Reporting Options should be selected and filled in. Countries then send the completed OIE Country Report back to OIE through email at [antimicrobialuse@oie.int](mailto:antimicrobialuse@oie.int). Once this is done, the AMU Team acknowledges, analyses and validates the document with active interaction with the country.

On the other hand, Animal Biomass is currently calculated directly by the AMU team for countries providing antimicrobial quantities in order to enhance the analysis and comparison of these data in the annual report. The biomass calculations are developed through Excel using two globally available datasets, WAHIS+ and FAOSTAT.

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<sup>1</sup> Animal biomass is defined as the total weight of the live domestic animals in a given population present during a year in a specific area, used as a proxy to represent those likely exposed to the quantities of antimicrobial agents reported

Once both components of the AMU Data Collection are validated, the AMU Team will integrate them in order to obtain antimicrobial quantities adjusted by animal biomass (mg/kg), to express the final result of the AMU Data Collection.

### **2.3 PROJECT OBJECTIVES**

The project was initiated to create an interactive system and to alleviate the time-consuming workload of OIE Member Countries and the OIE AMU Team. The objective is to ensure that the data collected are complete, validated and available 24/7 for use by Member Countries and provide further input in their AMR National Action Plans.

The OIE is, therefore, looking for a system in which countries can complete the OIE AMU questionnaire in the system, or via the OIE Excel Template which would then be imported into the system. Countries could also use the system to calculate the antimicrobial quantities. The priority is to motivate countries to calculate and to report data directly using the system. Otherwise an option for reporting using Excel must still be available for those countries that chose to use it.

### **2.4 PROJECT SCOPE**

At a minimum, the AMU System should be created to replicate and automate the current work of the OIE Data collection process mentioned in [Section 2.2](#) above. The AMU system will need to integrate with several systems.

The scope of the requirements is broken down into the following domains and detailed in the user requirements specification document (see annex 1)

1. Opening /closing of the OIE Antimicrobial Use Data Collection
2. Data input by countries
3. Quantitative AMU Data input by countries
4. Update of previously submitted data by countries
5. Error detection
6. Exporting and reviewing of data by OIE AMU Team
7. Exporting and reviewing of data by countries
8. Publishing of data
9. Attachment of documents
10. Generation of graphs and tables
11. Messaging and notification services
12. Calculations and conversion of antimicrobial quantities to kilograms (Kg's)
13. Calculating animal biomass (mg/kg)
14. Administration of users, countries & economic status
15. Data Sources from countries
16. Language Management
17. Sending mail
18. User Profiles and Permissions

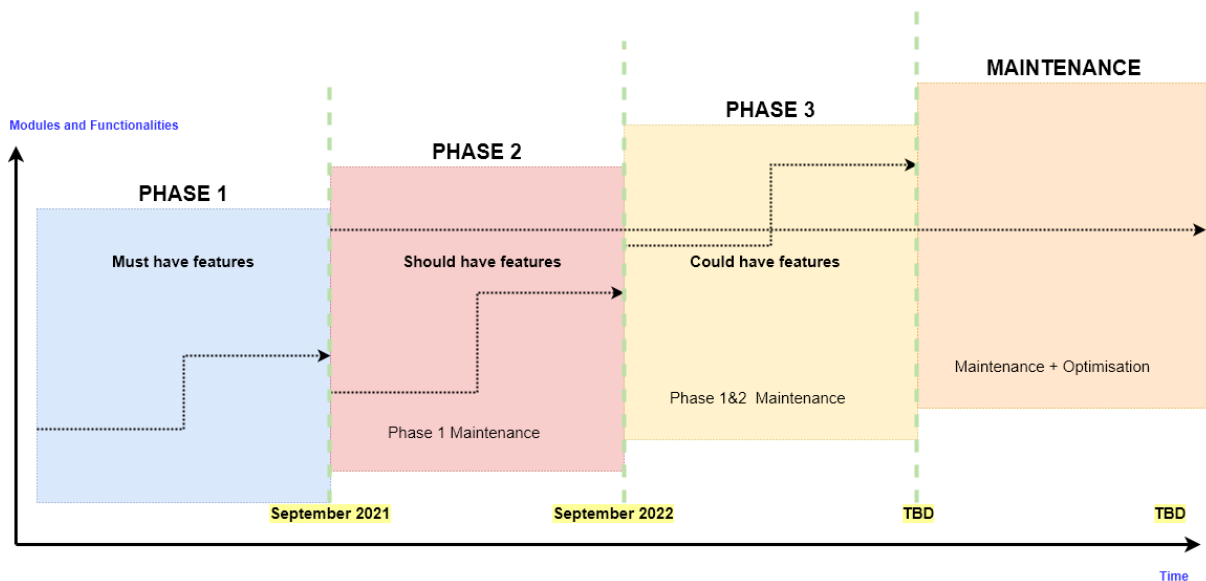
- 19. Content Management and User Experience Design
- 20. System menu structure
- 21. Search engine and global search tool
- 22. Documentation
- 23. Public Portal
- 24. Database Requirements

### 3. PROJECT ORGANISATION AND METHODOLOGY

#### 3.1 PLANNING AND IMPLEMENTATION SCHEDULE

The development and deployment of the AMU System will be delivered in 3 phases, with the first phase to delivered and operational by September 2021 in line with 7<sup>th</sup> round of AMU data collection. The second phase involves integration with another OIE application (OIE-WAHIS) and has an estimated duration of 1 year. The third phase is futuristic and is subject to confirmation and planning by different OIE stakeholders together with the IT supplier. Therefore, the fixed tranche for this call for tender is phase 1 and phase 2 only.

The temporal roll-out strategy for OIE AMU system is represented below:



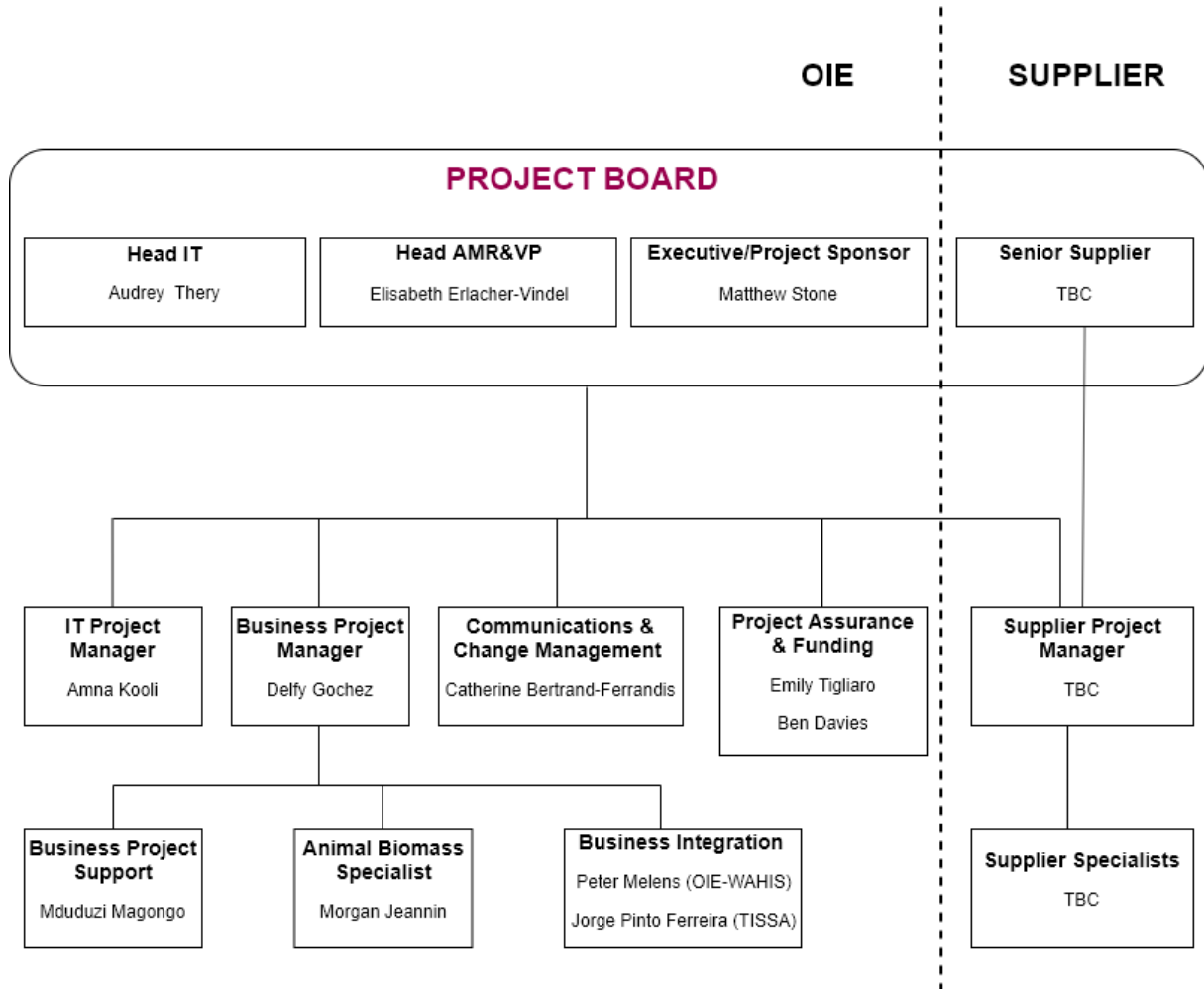
**Figure 1: Roll-out strategy**

The OIE will have at least 2 fulltime personnel (the IT Project Manager and the Business Project Support) for the duration of the project. Other project team members will have limited involvement during the following periods:

Period	Reason
1-31 May 2020/2021/2022	OIE General session
January - April 2020/2021/2022	AMU data validation and analysis
July – August 2020/2021/2022	Summer holidays

### 3.2 GOVERNANCE

The project governance is based on PRINCE2 (Projects IN Controlled Environments) methodology and the following structure has been established.



A Steering Committee, made up of all project team members, meets regularly as needed to discuss project tasks and status, review project risks, agree on key dates and deliverables and to make decisions. An Operational Committee is involved with the day to day activities of the project and made up of the following roles:

- **Business Project Manager** – the Project Owner and the point of contact for all business-related project needs
- **IT Project Manager** - ensures IT requirements are fulfilled and manages the deliverables of the supplier's IT
- **Business Project Support** – provides project management support

The Business Project Manager and the Business Project Support represent the final users to whom the future OIE AMU system is dedicated. They are responsible for the Business Requirements, to control the quality and conformity of the deliverables submitted by the Lead Contractor according to the

submitted Business Requirements. They ensure the training of the end OIE users for the use of the new OIE AMU system.

The Operational Committee will lead and coordinate the OIE AMU system project and follow the overall progress of the project.

After the Contract award, the operational committee will also include:

- Supplier Project Manager

After the Contract award, the Project Board will also include:

- Senior Supplier

**Both the Senior Supplier and Supplier Project Manager will be part of the project steering committee.**

The Supplier Project Manager will manage the development of the new AMU System in respect of the deadlines, quality and cost agreed by the OIE and the Supplier, according to the contract. The Supplier Project Manager is chosen by the Senior Supplier and is responsible for the Supplier's development teams and the good progress of the project. The Supplier Project Manager is also responsible for the technical choices for the solution's development, in agreement with the OIE IT Project Manager, and in accordance to the Business Requirements. This role also manages the project scope, goals and deliverables in accordance with Statement of Work and in collaboration with OIE project team and other stakeholders.

The Senior Supplier role will form part of the Project Board and will be responsible for the quality of products delivered by the supplier(s), the technical integrity of the project with respect of the deadlines and cost agreed by the OIE and the Supplier, according to the contract. The Senior Supplier will also be responsible for the following:

- Ensure that proposals for designing and developing the products are realistic
- Advise on the selection of design, development and acceptance methods
- Ensure that the supplier resources required for the project are made available
- Resolve supplier requirements and priority conflicts
- Ensure quality procedures are used correctly, so that products adhere to requirements
- Supervise and assign work to the Supplier Project Manager and Supplier Specialists i.e., Developers, Business/Systems Analysts, Architects, or any other supplier personnel
- Ensure good communication amongst its development team, the Supplier Project Manager and the OIE Project team, in accordance with the chosen project methodology.

For the day to day activities and tasks, the Supplier Specialists will report to the Supplier Project Manager who shall report progress and accomplishments every week and month to the OIE Operational Committee or Project Steering Committee on required occasions.

The monthly progress report shall include, at a minimum, the following information:

- Project schedule fidelity
- Project progress
- Major accomplishments of the past week/month
- Summary of risks and mitigation activities
- Summary of issues and impacts



Discovery of any major risk (documented or undocumented) in the project plan shall be escalated to the OIE Operational Committee within one (1) day.

All the Steering Committees and Operational Committees meetings, as well as the different workshops will be held in the premises of the OIE Headquarters in Paris, France.

**3.3 LOGISTICS**

The OIE Headquarters can provide a desk, internet access (the workstation should be provided by the supplier) for the Supplier Project Manager and have a teleconference room. The OIE Headquarters can also host experts and any other relevant Supplier Team member for a limited time (i.e. during workshops). However, it doesn't have the facilities needed to host the development team.

The OIE expects good communication and synergy between the different teams during the development of the solution, in accordance with AGILE methodology. Therefore, offshore or nearshore developments will not be accepted during the project. However, in order to reduce the costs, the maintenance of the solution in production can be performed by a nearshore team. This team shall be easily and quickly contactable in case of incidents and shall speak the official working language of the OIE: English. A secondary language is desirable but not mandatory (French).

**3.4 METHODOLOGICAL APPROACH**

Tenderers must follow best practices or standards in the following domains. An alternative must be clearly justified:

Domain	Best Practice/Standard
Project Management	PRINCE2
Software Development	AGILE methodology
IT Governance	COBIT5
IT Support and Maintenance	IT Infrastructure Library (ITILv3/4)
IT Security	ISO/IEC27000 and ISO 27001 (ISO Information Security Standard) compliant
Data Privacy	Must comply with the EU General Data Protection Regulation
Change Management	ADKAR Model

### 3.5 EXISTING TECHNICAL ENVIRONMENT & STANDARDS

Tenderers must follow OIE Information Technology Standards, an alternative must be clearly justified:

N°	OIE Standard
1	<b>Azure SSO authentication</b> as an SSO solution
2	<b>Amazon Web Services</b> as cloud solution
3	<b>Wildcard SSL Certificate</b> for the subdomains oie.int (without www), the system will have an URL like amu.oie.int without www
4	<b>Office 365 suite plan E3</b>
5	<b>Qlik</b> as a Business Intelligence tool
6	<b>Moodle</b> as an eLearning platform
7	<b>Mailchimp</b> as a newsletter tool
8	<b>DEEPL</b> as translation Tool
9	<b>WordPress</b> as a content management system (CMS)

## 4. SCOPE OF THE SERVICES

The Supplier will be expected to deliver the following services:

- All software development lifecycle phases (planning, requirements validation, design, development & implementation, testing, deployment & configuration, Guarantee & corrective / on-going maintenance, and Evolutive maintenance).
- Integration with the Tripartite Integrated Surveillance System on AMR/AMU (TISSA) in Phase 1 and the World Animal Health Information System (OIE-WAHIS) in Phase 2
- Change management
- Project management
- Training
- Documentations (User Manual, Admin Manual, etc.)

### 4.1 GENERAL REQUIREMENTS

The required system must allow the OIE AMU Team to collect the Antimicrobial agents intended for use in animals' data (which is currently manually collected using the OIE Template – Annex 2). Such data is collected once a year and this is known as data collection round. The proposed system must allow the business team to analyse this data with the help of a Business Intelligence tool. This system must also contain data validation workflow by different user profiles with different rights who will choose the level of confidentiality of these data or parts of the data. The system must also include the management of data, users and other parameters and will have a public part which allows to display public data, generate graphs and provide an advanced search engine.

There is also an opportunity to leverage this system to other OIE Business needs in future who also collect annual data in a similar method. The only difference would be the data collected (questionnaire template), date of opening and closing of the data collection, user profiles and other parameters in line

with the business requirements. **So, the OIE would like to take advantage of this project to answer a global need if it is possible, or at least to have a standard for this type of need via this system.**

#### **4.1.1 Project Management**

The Supplier shall follow the planning of the project, supervise the implementation of the solution and the associated deliverables, organise and lead the steering committees and operational committees with the OIE Project Managers, and write the minutes of the committee's meetings.

The Supplier shall provide a detailed Project Management Plan and Project Schedule including resource requirements for both organizations.

##### *4.1.1.1 Project management methodology*

The Supplier shall provide templates, checklists, the project governance plan and other tools for planning, implementation and review of project deliverables based on PRINCE2 methodology.

##### *4.1.1.2 Project initialisation*

The supplier shall provide a detailed roadmap, set up the project team, define the actors and their roles and responsibilities, circuits and instances of validation and arbitration of the project.

The supplier will conduct a kick-off meeting for the project and will meet with the OIE project team to review the specifics of the engagement and discuss timing and responsibilities.

Deliverables will include at a minimum:

- Detailed roadmap of the project
- Project controls summarizing the project level controls such as stage boundaries, agreed tolerances, monitoring and reporting
- 

##### *4.1.1.3 Risk management*

The Supplier shall identify and prioritize risks associated with the implementation of the plan, together with options and actions for mitigation of each identifiable risk.

Deliverable:

Risk management strategy and plan

##### *4.1.1.4 Quality Management*

The Supplier shall ensure that the required standard of quality for the project and products are met through the development of a Quality Assurance Plan. The quality assurance plan must include the following:

- Quality approach and method
- Detailed project governance
- Quality and acceptance criteria
- Quality tolerances

- Quality register
- Quality responsibilities
- Quality control and reviews
- Production and Quality assurance processes
- Project organisation
- Development plan stating the content of the runs and versions
- List of deliverables
- Summaries of the documentary deliverables
- Reversibility plan
- 

#### 4.1.1.5 *Implementation Timeline*

The supplier shall set forth a schedule of events, deliverables, and training to create a timeline for successful implementation and provide a detailed schedule.

#### 4.1.1.6 *Reporting*

Project reports should focus on important details like metrics, issues, open work and resources, and provide project managers an insight to keep projects on track.

### **4.1.2 User requirements validation, architecture and general conception**

The objective of the user requirement validation and design phase is to agree with the supplier the detailed requirements through a series of meetings with the relevant OIE stakeholders to validate and finalize the all requirements. A user requirements specification document has been drafted by the OIE (Annex 1) and the goal is to ensure the supplier understands what is required and feasible.

The supplier is expected to propose a system architecture and navigation that provides an easy and intuitive user experience, and to develop an information architecture that is efficient, easily understood and sustainable by OIE staff in the future.

Information should be grouped and presented in a logical manner and require no more than three levels/clicks of “drill down” for the user to find the desired information.

The system must not require plug-ins as a default nor other tools to upload (e.g. Flash) for any part of the system to function.

The system must be designed with a balance of text and graphics such that each page loads in 5 seconds or less on the average computer (using a DSL or cable modem Internet connection).

Deliverables will include at a minimum:

- Detailed functional specifications
  - o Use cases
  - o Class diagrams
  - o Data model with accessible presentation to OIE staff, including the detailed data dictionary and data controls
  - o Data dictionary

- Database structure
- Flowcharts and Entity relationship diagrams
- Interface descriptions
- Detailed system specifications / technical specifications
- System design including API design / Technical architecture (infrastructure) including hosting options if applicable
- Requirement traceability matrix
- The designed solution and wireframes (design screens)
- Historical data retrieval strategy

### **4.1.3 Development / Implementation phase and delivery**

#### *4.1.3.1 Development / implementation system*

The objective is to develop / implement and install the AMU system in a specific environment and ensure the good behaviour of the system. For each run or version, perform the developments and/or components assembly and/or setups allowing the implementation of the run or version.

Deliverables will include at a minimum:

- Source code with extensive comments in English
- System installation and configuration
- User Setup, Authentication and Management processes
- Installation and settings manual
- Operations and administration manual

#### *4.1.3.2 API development, implementation*

Deliverables will include at a minimum:

- API source code with extensive comments in English
- Integration with the Tripartite Integrated Surveillance System on AMR/AMU (TISSA) and with OIE-WAHIS
- API documentation and publication

#### *4.1.3.3 Data Conversion / data import of historical data*

The objective is import historical AMU data collected in the past 4 rounds (years). Data is currently in Microsoft Excel.

Deliverables will include at a minimum:

- Data Mapping documentation

### **4.1.4 Testing**

Quality Assurance testing (including unit tests) is the responsibility of the Supplier. The new system will only be deployed after it has passed the Supplier's internal QA testing at which point OIE team will

perform User Acceptance Testing as the final stage of testing before the customization is certified for production use.

After each User Acceptance tests phase, the OIE will arbitrate a go / no-go decision of the deployment of the version, based on the number of remaining blocking, major and minor defects. The number of defects impacting the decision will be settled before the start of the User Acceptance tests phase, depending on the content of the delivery.

The standard testing tool of the OIE is Test Rail (Gurock), the OIE could will record the test scenarios within this tool. The supplier needs to provide a tool to track the defects found during the UAT. The OIE must be able check the conformity of the version's functionalities in regard with the detailed functional specifications.

The supplier must provide a user guide of the deployed version to the key OIE testers and inform them of the content, fix the defects raised by OIE testers based on the tests scenarios and perform a new delivery of the version if relevant to fix the raised defects.

Deliverables will include at a minimum:

Presentation support to OIE testers

Updated source code

Updated documentation if relevant

Provide a testing tool, allowing to track defects

Unit tests

Integration and performance tests if relevant

Minutes of the tests, including:

- Scenarios
- Non-regression scenarios
- Unit tests
- Integration and performance tests if relevant
- Tests results

### **Testing of a run**

The testing of a run will allow to check the conformity of the developed module according to the specifications, and the interoperability of the developed module with other modules or components of the solution.

The tests of runs are temporary and complete each other. A final homologation will be performed to validate the delivery of a version.

#### **4.1.5 System Deployment and Configuration**

Deploy and configure the system on the production environment.

#### **4.1.6 Training of OIE key users**

The OIE has an eLearning platform and the supplier is expected to produce the training content for the purposes of fully training OIE staff members and provide training and all necessary support to permit easy use of the AMU System (user guide, etc...). The training approach must be a train-the-trainer so

that OIE staff may be able to train other users of the system (OIE Delegates and Focal Points for Veterinary Products).

About 5 OIE key users (Business Process owners) need to be trained. Training session will take place in the OIE Headquarters. The logistics (room booking, meeting invitations, etc.) will be performed by the OIE staff.

Deliverables will include at a minimum:

User guide of the solution

Prepare the training supports

Animate a training session

Session Rating questionnaire

User and administration guides

E-Learning content **only** based on Moodle. Please note that OIE already has the Moodle platform.

#### **4.1.7 Documentary deliverables**

The supplier must provide documentary deliverables to the OIE along the project lifecycle and should be the object of a validation by the OIE. The produced documentation, both technical and functional, shall allow the OIE to take ownership of the new system. Thus, the deliverables should be clear and easily understandable, even by a layman. All the deliverables must be produced in English.

- **Baselines**

- Benefits Management Approach
- Change Control Approach
- Communication Management Approach
- Plans
  - Quality Management Plan
  - Benefits Review Plan
  - Project Management Plan
- Product Description
- Project Initiation Documentation
- Project Product Description
- Quality Management Approach
- Risk Management Approach
- Work Packages

- **Records**

- Daily Log
- Issue Register
- Lessons Log
- Quality Register
- Risk Register

- **Reports**

- Checkpoint Report
- End Project Report
- End Stage Report
- Exception Report
- Highlight Report
- Issue Report
- Lessons Report

#### 4.1.8 Guarantee and corrective / on-going maintenance

The supplier must maintain the solution developed in the framework of the project during a period a guarantee of 12 months starting from the go-live for each phase of the project.

The Supplier must provide production deployment and post-production emergency support when any change is deployed to the production environment.

During this period of guarantee and on-going maintenance, the OIE will alert the supplier on the malfunctions of the system which will be qualified in minor, major or blocking defects by the OIE.

The Supplier will analyse the issue to establish its origin. A patch will be applied if the defect is due to an installation or setting error, or to the developments performed by the supplier. On the contrary, the supplier will justify its lack of responsibility in the defect.

The intervention period is 7d/7, 24h/24. The service supplier will have to arrange an on-site visit if necessary.

The response and recovery times will be the following:

Type of defect	Definition	Response time	Recovery time
Blocking	A defect is blocking when a sensitive functionality of the system, or the whole system, is out of order and the user does not have any workaround.	0,5 days	0,5 days
Major	A defect is major when a process cannot be performed normally, inducing a discomfort to the user	0,5 days	1 day
Minor	A defect is minor when it does not impact the behaviour of the solution neither its use.	2 days	10 days

#### 4.1.9 Evolutive maintenance

The supplier must assist the OIE in adding an evolution of the functional perimeter of the solution. This service will not be in the fixed part and will be performed based on purchase orders. The purchase order will specify the desired deliverables, the starting date of the service and the delivery deadlines.

To each evolutive maintenance will be automatically associated a guarantee as defined in chapter 4.1.8 “Guarantee and corrective / on-going maintenance”. This will include:

- Define the new functional and technical detailed specifications
- Architecture update if relevant
- Data model update if relevant



- Development of the new functionalities
- Unit, integration, non-regression and performance tests
- Deployment
- Manuals update if relevant
- Corrective maintenance
- Only the relevant deliverables depending on the desired evolution will be required.

## **4.2 BUSINESS REQUIREMENTS**

The scope of this project is to set up a system that meets the business requirements detailed in the user requirements specification document in annex 1. The project is broken into 3 phases as detailed below. **However, the scope of the fixed tranche for this call for tender is phase 1 and phase 2 only.**

### **4.2.1 Phase 1**

Phase 1 will include all the must have requirements detailed in the user requirements specification document in annex1.

The Supplier will be expected to deliver in this phase the following services:

- Project Management:
  - o Project management methodology
  - o Project initialisation
  - o Risk management
  - o Quality Assurance plan
  - o Implementation Timeline
  - o Reporting
- User requirements validation, design phase and general conception
- Development / Implementation phase and delivery
  - o Development / implementation system
    - o API development / implementation
    - o Data Conversion / data import of historical data
- Testing
- Training of OIE key users
- Documentary deliverables
- Guarantee and corrective / on-going maintenance
- Evolutive maintenance

### **4.2.2 Phase 2**

Phase 2 will focus on the integration of OIE-WAHIS for reporting on animal population and production data which are necessary for the calculation of animal biomass and all the should have requirements detailed in the user requirements specification document in annex 1.

The Supplier will be expected to deliver in this phase the following services:

- Project Management:
  - o Risk management
  - o Quality Assurance plan (update if needed)
  - o Implementation Timeline (update if needed)
  - o Reporting
- Development / Implementation, installation phase and delivery
  - o API, development / implementation
  - o Data import of OIE-WAHIS data
- Testing
- Training of OIE key users
- Documentary deliverables
- Guarantee and corrective / on-going maintenance
- Evolutive maintenance

#### **4.3 TECHNICAL REQUIREMENTS**

All the functionalities (applicative bricks, developments, hardware, etc.) provided by the supplier in the framework of the AMU system project must guarantee the perfect functioning of the AMU system in accordance with the constraints, requirements and technical environments described in the section 4 of the user requirements document (see annex 1).

The supplier will be responsible for operating and maintaining the infrastructure of AMU system environments. The supplier will be responsible for providing all operations, maintenance and support, backup and security related services essential to run the AMU system.

The choice of the technical solution and technical architecture is open to the decision of the supplier, if it meets all the requirements described in all the User Requirements document.

The choice of the Database management system (Oracle, MySQL, Microsoft SQL Server, etc.) is open to the decision of the Supplier.

The Supplier will explicitly justify the advantages of the proposed database management system in its proposal.

The database will include a specific table describing all tables and all tables' columns of the database.

#### **4.4 CONDITIONAL TRANCHES**

Phase 3 (future)

Phase 3 is futuristic and stated here only as a long-term vision of the AMU System project. This phase will consolidate other OIE applications including integrations with the OIE PVS (Performance of Veterinary Services) Tool, Observatory and being able to report data per species. Phase 3 will be aligned with the rollout of OIE PVS, Observatory and Substandard and Falsified Veterinary Medical Products IT projects which is subject to confirmation and approval by the relevant stakeholders.

#### **4.5 CHANGE MANAGEMENT AND COMMUNICATION REQUIREMENTS**

Change Management and Communication Plan are two related streams for the project. Change Management requirements will focus on the users (administrators, contributors and public) of the AMU system whilst the Communication Plan requirements will focus on external communications aimed towards OIE reputation and awareness activities.

##### **4.5.1 Change Management**

The objective is to implement an efficient change management process that will help AMU users understand, commit to, accept, and embrace changes brought by the AMU System implementation.

Deliverables will include at a minimum:

- Change Management approach and methodology (e.g. ADKAR)
- Change Management tools and templates
- Stakeholder analysis
- Change impact assessments
- Role impact assessments
- Readiness assessments
- Change management checklists that are aligned with the Project approach
- Roadmap for change management
- Change Management training curriculum
- Tutorials and other materials to help users interact with system
- Communications tools for the change management
- Reinforcement Mechanisms Recommendations. The supplier shall suggest systematic and structured ways to reinforce proposed change and keep it in place, including recommending mechanisms to keep the change in place throughout the project.

##### **4.5.2 Communication Plan**

The communication plan will target AMR stakeholders, partners, donors, and national authorities. The objective of the communication plan will be re-enforcing the leadership of the OIE in the AMR space. The communication plan shall use a variety of channels, provide feedback opportunities and present the architecture for a complete approach to ensuring that receivers understand and internalize the key messages.

Deliverables will include at a minimum:

- A communication plan and related materials
- Communication approach and methodology
- Communication tools and templates

## **5. RESPONSE STRUCTURE**

To facilitate a timely and comprehensive evaluation of all submitted answers, responses must be submitted using the format requested in this RFP. Any deviation from this format may lead to the rejection of the answer.

Any deviations from requirements, or requirements that cannot be satisfied by the supplier, must be clearly identified.

Responses to the call for tender should cover the following elements to provide enough background to the evaluation of the offers and ensure homogenous assessment.

The response document will use the following format and details are explained in the subsequent sections of this document:

Chapter	Chapter N°
Technical Response	
General company information	1
General information	1.2
Activities	1.3
Experience	1.4
Client references	1.5
Understanding of the project	2
Methodology and approach for each core component	3
User requirements validation, design phase and general conception	3.1
System Development /Implementation	3.2
Testing	3.3
Training of OIE key users	3.4
Documentary deliverables	3.5
System Deployment and Configuration	3.6
Guarantee, Support and Maintenance	3.7
Change Management and Communication Plan	3.8
General methodology and proposed schedule	4
Allocated human resources	5
Success and Risk factors	6
Additional information	7
Annex	
AMU compliance grid	8
Quality Assurance Plan	9
C.Vs and competency matrix	10

## **5.1 TECHNICAL RESPONSE**

All requests for information in all sections of this document must be responded to as concisely as possible while providing all information necessary to understand the process proposed.

### **5.1.1 General company information**

This section should include information on your organisation and its activities, including:

5.1.1.1 *General information*

- Company name (and name of group if applicable);
- Company Web Site URL;
- Structure (location and number of employees in the headquarters as well as regional offices);
- Clearly indicate whether the company has presence in France;
- Contact point name, Title, Address, phone number and email address;
- Names of companies that will share significant and substantive responsibilities with the supplier in performing the scope of services under the Contract.

5.1.1.2 *Activities*

- Company background review;
- Description of major activities (including number of employees and their location).

5.1.1.3 *Experience*

For each field of expertise, please indicate the experience and the number of employees (and their location).

- Expertise 1;
- Expertise 2;
- Expertise 3;

5.1.1.4 *Client references*

Please duplicate form and provide at least three (3) client references.

<b>Client Name</b>	
<i>Contact Person</i>	
<i>Title</i>	
<i>Phone Number</i>	
<i>Email Address</i>	
<i>Type of Services Provided</i>	
<i>Services Provided Similar to the OIE's requirements</i>	Yes – Explain similarities:  No – Explain differences:
<i>Please indicate if this was a partnership with another company. If so, explain the type of partnership, responsibilities and any other relevant information?</i>	

## 5.1.2 Understanding of the project

The supplier shall include its overall approach and plans necessary to meet the requirements of the RFP in a narrative format. This narrative should convince OIE that the supplier understands the objectives that the contract is intended to meet, the nature of the required work and the level of effort necessary to successfully complete the contract in the set timeframe.

The supplier should provide the following items as part of their proposal for consideration:

- Anticipated resources you will assign to this project (total number, role, title, experience)
- Timeframe for completion of the project
- Project management methodology

## 5.1.3 Methodology and approach for each core component

Tenderers should clearly highlight throughout this section which methodology they use and specify which activities will require an on-site presence and which will be carried out remotely.

### 5.1.3.1 *User requirements validation, design phase and general conception*

The service supplier will include in the response to this RFP at least a detailed summary of the Technical Architecture document that:

- Describe and justify the languages, methods and tools used to develop and deploy the proposed solution. The supplier must describe the Interconnectivity / API architecture and approach.
- Describe any hardware and infrastructure requirements for the proposed solution.
- Describe the proposed infrastructure architecture, including hosting options and provide a schema of the proposed technical architecture specifying the necessary components (webserver, authentication server, database, etc.) and justify the choice of this technical architecture. The maximum peaks the proposed architecture can handle must also be described.
- Indicate, for each software component, the version used, its role, its potential and the name of the editor, the license type, the setting possibilities. Indicate how the software components communicate with each other on a logical (data and types exchanged) and technical plans (protocols, synchronic or not, etc.).
- Describe the level and guarantees of sustainability and scalability for each applicative brick, especially the potential open-source ones.
- Indicate your approach to user experience while building the system and development of the materials delivered to the users. Please provide examples to clearly demonstrate and highlight this.

### 5.1.3.2 *System Development /Implementation*

Describe the proposed implementation plan. Address the following:

- Proposed phasing for roll-out of system modules.
- Explanation of advantages and risks associated with this plan

List out the specific deliverables and indicate what is not included.

Provide a list of the technical documentation to be provided prior to the conclusion of the project.

Describe your strategy and tool to import the historical AMU data (currently in Microsoft Excel). Please provide your recommended best practices and recommendations regarding data conversion / import.

Describe the system integration approach, architecture, languages and tools used to develop your proposed solution

Provide information about the system proposed in response to the OIE’s RFP and the OIE’s user requirements. The supplier must fill in the annex 3 (AMU Compliance grid) as follow:

- Responses to the user requirements should be completed to identify both the capability of the system and the scope of the implementation.
- Indicate the proposed scope of the project by coding each requirement using the following response codes:

User Requirements Responses	
Column E: Available Responses	
Y	Requirement Met and Proposed (Standard features of system)
Y-ND	Requirement Met and Proposed (not standard feature of system but Proposer can deliver)
N	Requirement Not Met with Proposal
P	Partially

All positive responses (Y and/or Y-ND) will be considered in scope. The requirements responses submitted will become part of the agreement. Proposers are expected to warrant that implementation services will include all positive responses (every response except “N” and “I”).

**5.1.3.3      *Testing***

Describe the system testing approach and test data to be used. A full test plan must be included.

**5.1.3.4      *Training of OIE key users***

Describe the training that accompanies the system implementation. What types of training materials are provided? Provide an overview of proposed training plan/strategy, specifying how and when training is to be delivered for both on-site and off-site training and web training services for the core project team, end users, and technology personnel.

**5.1.3.5      *Documentary deliverables***

Provide an overview of proposed approach to documentation services.

List the documentations that the OIE can expect at the conclusion of the project.

**5.1.3.6      *System Deployment and Configuration***

Describe your deployment and configuration approach

#### 5.1.3.7 *Guarantee, Support and Maintenance*

- Describe the system support / maintenance approach and / or programs available.
- Does the maintenance program include all future system upgrades?
- Describe the hours of support you provide? Where is it located? Is it staffed by your own employees or is it a third-party facility?
- Briefly discuss technical support staffing numbers, staff experience, etc.
- Please describe your support services at emergency and non-emergency situations.
- Provide a copy of the supplier's disaster recovery plan
- Detail how the data is protected against leaks
- Provide a list of supplier employees and third parties that can access the OIE's data
- Provide a copy of your incident response plan.

#### 5.1.3.8 *Change Management and Communication Plan*

- Provide an outline of your change management and communication methodologies and toolkits.
- Indicate your approach to branding the materials delivered to your clients. Please provide examples to clearly demonstrate and highlight this.
- Indicate your approach to user experience while building the system and development of the materials delivered to the users. Please provide examples to clearly demonstrate and highlight this.
- Provide examples of past projects to clearly demonstrate experience and credibility in delivering change management and communication expert services to non-profit organisations like the OIE.
- Describe any difficulties or challenges that are anticipated in providing the services and how you will manage them.
- Provide an executive summary of the proposed team that will be assigned to deliver on the scope of services. Include copies of their CV as separate appendices for this proposal submission
- Demonstrated ability to communicate effectively including cultural sensitivity in all communications. Please provide examples of past projects to support this.
- Demonstrated ability to produce high quality deliverables. Please provide examples of past projects to support this.

#### **5.1.4 General methodology and proposed schedule**

This section should identify the recommended methodology to implement the different steps in the most appropriate and effective approach.

The offer should provide input on the proposed project governance mechanism and a clear rationale as to the proposed organisation of activities. Major constraints as well as pre-requisites (time, stakeholder availability) should be identified. A schedule encompassing the different milestones should be provided.

The general methodology to manage the project, including the format of the follow-up on the part of the supplier as well as the measures to ensure respect of the project deadlines, tracking of project costs and the delivery of quality deliverables should be identified.

The supplier will detail in its response how it plans to ensure this good communication between the different entities, especially on the location of the development and maintenance teams, and the possible travels of the MOE Project Manager.

Specific approach to meeting the requirement: Define the process, project management and team structure that would execute this type of solution. Explain how you will complete the scope of work.



The Supplier should be able to demonstrate its capability to bring the contract to a satisfactory conclusion by describing the methodology of approach to accomplish the project's required outcome.

The Supplier should be able to demonstrate the ability to produce high quality deliverables with providing examples of past projects to support this.

The shortlisted Suppliers may be invited to deliver a presentation on the capability and the technical offer shall include the following information:

- Organization structure
- Reporting and recording system proposed for the work at the execution stage.
- Supplier's own quality plan.
- Billing plan that might be used for supplier.
- Hypothetical execution (work plan) stages in details
- Detailed roadmap by stage
- Any other information required to be shared with OIE
- 

#### **5.1.5 Allocated human resources**

This section should identify the professional profiles (field of expertise, seniority etc.) proposed throughout the project and according to each stage of the methodology established in the previous section. It should include a rationale for the team set-up and clearly underline how the team responds to the required skills as described in the TORs., provide, for each profile, a short biography of the identified consultant and justification of his/her role in the project. A short CV for each consultant (no longer than 2 pages) with reference to relevant experience should be annexed to the main response document, as well as the completed and signed "Statement of availability of experts" (Annex 3 of RFP\_ A. Tender Rules document).

- Qualifications, references, and licenses must be clearly stated. This part should include the candidate's experience on similar projects and include 2 references and how to contact them (Government references are preferred but not a must).
- Project Team, Location of Work, and Subcontracting. State the names and qualifications of the individuals who will have responsibility for this project.
- Detail of workload estimations per phase.

#### **5.1.6 Success and Risk factors**

This section should provide a review of major constraints identified at this stage, potential risks to the project and requirements to ensure its successful completion. Prerequisites that you deem important to carry out the project effectively should be identified.

This supplier should describe the risk implementation approach, risk management tools and procedure.

The Supplier should describe the quality approach, the dependencies and the system performance criteria and standards to be used. The supplier must include in the response to this RFP a first version of the Quality Assurance Plan including at least:

- Quality approach and method
- The detailed project governance and escalation process and specific AGILE methodology meetings and their adherence with existing committee
- Quality tolerances
- Quality register
- Quality responsibilities

- Quality control and reviews
- Production and Quality assurance processes
- Project organisation
- Development plan stating the content of the runs and versions
- List of deliverables
- Summaries of the documentary deliverables
- Tenderers should present their reversibility plan in the Quality Assurance plan, specific to each phase of the project, and provide an estimated quotation for this phase.

### 5.1.7 Additional information

This section should include any additional information not provided for elsewhere that you deem important for us to know. Innovative solutions as well as relevant “Best practices” that may not be expressly mentioned in this document should be provided here.

Each proposal must provide information about any firm involved with this proposal including implementation supplier, and/or any third-party suppliers so that the OIE can evaluate the proposer’s stability and ability to support the commitments set forth in response to the RFP. The OIE, at its discretion, may require a proposer to provide additional supporting documentation or clarify requested information.

This section of the Proposal should include a general discussion of the following:

- Role of any Third-Party firms.
- List and describe all system products and any necessary services required to accomplish the OIE’s goals and meet the requirements of the RFP.
- Identify any additional recommendations regarding modules the OIE may consider.

## 5.2 FINANCIAL OFFER

The financial offer should be provided in EURO and quoted free of all duties, taxes and other charges, excluding VAT.

### 5.2.1 Core Components

The financial offer should provide:

- An overall cost;
- A cost breakdown as follows:

The supplier will develop and detail by year its pricing estimation according to the following required units of services:

**Project Management:** costs needed to structure, implement and monitor all aspects concerning the development and maintenance of the AMU System. More specifically, this includes undertaking monitoring and evaluation of project activities against the business case, tracking project costs, verifying outputs and measuring benefits to the organisation associated with the implementation of the project and to identify, analyse and respond to risk factors throughout the life of the project and in the best

interests of its objectives. This will include proactive control of possible future events and resolution of risks as they occur. This should also take into consideration the quality requirements of the project.

**Build and deploy** costs to construct, develop and launch all the AMU System components. This will include the costs of the team of developers which will be in charge of construction of the system, testing, interoperability with other data sources, data conversion and data migration.

**System / Software integration**: costs to integrate and customise a business intelligence tool; costs to develop a generic API to allow third parties to connect; costs to develop and integrate with OIE-WAHIS (Phase 2); costs to integrate with a Customer Relationship Management system.

**Change management and communication**: costs related to the processes and mechanisms required to transfer knowledge and ensure that standardised methods and procedures are used for efficient and prompt handling of all changes and for the communications requirements.

**Support, maintenance and optimization**: to correct defects, to improve performance or other attributes on the system after the delivery of the AMU System. Software maintenance for standard applications and service level agreement (SLA) covering the additional services are also included.

**Hardware and infrastructure**: costs to build the computing and networking infrastructure needed to support the AMU System. Including any hosting costs (if applicable).

The Tenderer will also provide the daily costs related to all professional profiles he will engage in each phase (including phase3).

Moreover, the Tenderer will sum up its estimated budget by stage, unit of service and phase (build/maintenance), according to the template: AMU Pricing Grid (Annex 4).

# ANNEXES

## **ANNEX 1– USER REQUIREMENTS**

The user requirements specification document (See separate pdf)

## **ANNEX 2– OIE TEMPLATE**

[https://www.oie.int/fileadmin/Home/eng/Our\\_scientific\\_expertise/docs/pdf/AMR/ENG\\_AMUse\\_Template\\_Final\\_2019.xls](https://www.oie.int/fileadmin/Home/eng/Our_scientific_expertise/docs/pdf/AMR/ENG_AMUse_Template_Final_2019.xls)

## **ANNEX 3– AMU COMPLIANCE GRID**

The AMU Compliance grid document (See separate Excel)

## **ANNEX 4– AMU PRICING GRID**

The AMU Pricing Grid document (See separate Excel)