



Request for Proposals (RfP) Redesign of PANORAMA.solutions

IUCN, Knowledge Management and
Library Team

RfP Reference: IUCN-24-01-P03463-1

Welcome to this Procurement by IUCN. You are hereby invited to submit a Proposal. Please read the information and instructions carefully because non-compliance with the instructions may result in disqualification of your Proposal from this Procurement.

1. REQUIREMENTS

- 1.1. A detailed description of the services and/or goods to be provided can be found in Attachment 1.

2. CONTACT DETAILS

- 2.1. During the course of this procurement, i.e. from the publication of this RfP to the award of a contract, you may not discuss this procurement with any IUCN employee or representative other than the following contact. You must address all correspondence and questions to the contact, including your proposal.

IUCN Contact: Marie Fischborn, Lead, Protected Area Solutions, marie.fischborn@iucn.org

3. PROCUREMENT TIMETABLE

- 3.1. This timetable is indicative and may be changed by IUCN at any time. If IUCN decides that changes to any of the deadlines are necessary, we will publish this on our website and contact you directly if you have indicated your interest in this procurement (see Section 3.2).

DATE	ACTIVITY
24 January 2023	Publication of the Request for Proposals
7 February 2023	Deadline for expressions of interest
7 February 2023	Deadline for submission of questions
10 February 2023	Planned publication of responses to questions
28 February 2023	Deadline for submission of proposals to IUCN (" Submission Deadline ")
3 March 2023	Clarification of proposals
6-10 March 2023	Interviews with shortlisted bidders

DATE	ACTIVITY
13 March 2023	Planned date for contract award
13 March 2023	Expected contract start date

- 3.2. Please email the IUCN contact to express your interest in submitting a proposal by the deadline stated below. This will help IUCN to keep you updated regarding the procurement.

4. COMPLETING AND SUBMITTING A PROPOSAL

- 4.1. Your Proposal must consist of the following four separate documents:

- Signed Declaration of Undertaking (see Attachment 2)
- Pre-Qualification Information (see Section 4.3 below)
- Technical Proposal (see Section 4.4 below)
- Financial Proposal (see Section 4.5 below)

Proposals must be prepared in English.

- 4.2. Your Proposal must be submitted by email to the IUCN Contact (see Section 2). The subject heading of the email shall be [RfP Reference – bidder name]. The bidder name is the name of the company/organisation on whose behalf you are submitting the proposal, or your own surname if you are bidding as a self-employed consultant. Your proposal must be submitted in PDF format. You may submit multiple emails suitably annotated, e.g. Email 1 of 3, if attached files are too large to suit a single email transmission. You may not submit your Proposal by uploading it to a file-sharing tool.

IMPORTANT: Submitted documents must be password-protected so that they cannot be opened and read before the submission deadline. Please use the same password for all submitted documents. After the deadline has passed and within 12 hours, please send the password to the IUCN Contact. This will ensure a secure bid submission and opening process. Please DO NOT email the password before the deadline for Proposal submission.

- 4.3. *Pre-Qualification Criteria*

IUCN will use the following Pre-Qualification Criteria to determine whether you have the capacity to provide the required goods and/or services to IUCN. Please provide the necessary information in a single, separate document.

Pre-Qualification Criteria

- 1 3 relevant references of clients similar to IUCN / similar work
- 2 Confirm that you have all the necessary legal registrations to perform the work
- 3 State your annual turnover for each of the past 3 years
- 4 How many employees does your organisation have who are qualified for this work?
- 5 Are you able to provide all elements of this RfP in-house? If not, please clarify which elements would be outsourced and relationship with any sub-contractors.

- 4.4. *Technical Proposal*

The technical proposal must address each of the criteria stated below explicitly and separately, quoting the relevant criteria reference number (left-hand column).

Proposals in any other format will significantly increase the time it takes to evaluate, and such Proposals may therefore be rejected at IUCN's discretion.

Where CVs are requested, these must be of the individuals who will actually carry out the work specified. The individuals you put forward may only be substituted with IUCN's approval.

IUCN will evaluate technical proposals with regards to each of the following criteria and their relative importance:

Description	Information to provide	Relative weight
1 Approach and plan	A Proposal detailing the Proposer's approach and implementation plan for the development of the website. The Proposer should also include a suggested timeframe for testing and debugging each deliverable and allow IUCN 7 days to provide feedback for smaller design or functional tasks, as well as a concrete description on how the Proposer will ensure that the components are ready by the deadlines indicated in the timeline in <i>Part 2.19 Timeframe</i> and what actions it suggests taking in case of delays	25%
2 Technology and systems	A proposal detailing the technology (CMS) and systems (functionalities) or approaches (from relevant previous experience) of the Proposer to answer IUCN requirements and especially demonstrate the Proposer's expert ability to tackle specifically the below requirements from IUCN as described in <i>Part 2.11 Functionality requirements</i> : <ul style="list-style-type: none"> - REQ-19-24 Map Explorer - REQ-75 Hosting Options - REQ-42 Text collaboration with user generated content - REQ-72 Source Code available 	25%
3 Previous experience in handling development projects of similar scope and size	Details of three relevant examples of past work demonstrating the capacity of the Proposer to produce quality websites, which are comparable to this project, and to provide appropriate CMS training for site managers. Please mention any differences in scope or timeframe between the	20%

4	Outline of the team	examples and what the Proposer would provide for IUCN with names and expertise that the Proposer will assign to the project for all aspects	20%
5	References	contact details of 3 referees familiar with the Proposer's experience relevant to website and online system development	5%
6	Website of the Proposer		5%
	TOTAL		100%

Furthermore, "additional services" will be considered but are not part of the evaluation criteria: Details of additional, related services that the Proposer considers would enhance the overall effectiveness of communications in support of the project. Please note that these will not form part of the evaluation of Proposals and will only be used in the final contract negotiations with the selected Proposer.

4.5. *Financial Proposal*

4.5.1. The financial proposal must be a fixed and firm price for the provision of the goods/services stated in the RfP in their entirety.

4.5.2. *Prices include all costs*

Submitted rates and prices are deemed to include all costs, insurances, taxes (except VAT, see below), fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Terms of Reference or Specification of Requirements. IUCN will not accept charges beyond those clearly stated in the Financial Proposal. This includes applicable withholding taxes and similar. It is your responsibility to determine whether such taxes apply to your organisation and to include them in your financial offer.

4.5.3. *Applicable Goods and Services Taxes*

Proposal rates and prices shall be exclusive of Value Added Tax.

4.5.4. *Currency of proposed rates and prices*

All rates and prices submitted by Proposers shall be in Swiss Francs.

4.5.5. *Breakdown of rates and prices*

For information only, the price needs to be broken down as follows:

Item	Binding offer required	One-off cost [e.g. setup]	Recurring cost [annual basis]	Hourly rates [For information]
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Development, testing and deployment incl. integrations	yes	x		x
Cost of specific solutions necessary to meet the need of this RFP, but not provided by the CMS (cost per solution)	If possible	(x) (if applies)	(x) (if applies)	
Migration of content	yes	x		x
Training	yes	x		x
Project management	yes	x		x
Ongoing support, maintenance and security management for the development phase	yes		x	x
TOTAL PRICE		x	x	

Separately, bidders are requested to include:

Quote for ongoing hosting and maintenance of the platform, following this contract (annual cost)	yes		x	x
Any additional services proposed by the bidder to improve the overall product but not required by this RFP	yes	(x) (if applies)	(x) (if applies)	(x) (if applies)

It is at the discretion of IUCN to decide whether or not the winning bidder will be contracted for these additional services as well.

- 4.6. Additional information not requested by IUCN should not be included in your Proposal and will not be taken into account in the evaluation.
- 4.7. Your proposal must remain valid and capable of acceptance by IUCN for a period of 90 calendar days following the submission deadline.

4.8. *Withdrawals and Changes*

You may freely withdraw or change your proposal at any time prior to the submission deadline by written notice to the IUCN Contact. However, in order to reduce the risk of fraud, no changes or withdrawals will be accepted after the submission deadline.

5. EVALUATION OF PROPOSALS

5.1. *Completeness*

IUCN will firstly check your proposal for completeness. Incomplete proposals will not be considered further.

5.2. *Pre-Qualification Criteria*

Only proposals that meet all of the pre-qualification criteria will be evaluated.

5.3. *Technical Evaluation*

5.3.1. *Scoring Method*

Your proposal will be assigned a score from 0 to 10 for each of the technical evaluation criteria, such that '0' is low and '10' is high.

5.3.2. *Minimum Quality Thresholds*

Proposals that receive a score of '0' for any of the criteria will not be considered further.

5.3.3. *Technical Score*

Your score for each technical evaluation criterion will be multiplied with the respective relative weight (see Section 4.4) and these weighted scores added together to give your proposal's overall technical score.

5.4. *Financial Evaluation and Financial Scores*

The financial evaluation will be based upon the full total price you submit. Your financial proposal will receive a score calculated by dividing the lowest financial proposal that has passed the minimum quality thresholds (see Section 5.3.2) by the total price of your financial proposal.

Thus, for example, if your financial proposal is for a total of CHF 100 and the lowest financial proposal is CHF 80, you will receive a financial score of $80/100 = 80\%$

5.5. *Total Score*

Your proposal's total score will be calculated as the weighted sum of your technical score and your financial score.

The relative weights will be:

Technical:	70%
Financial:	30%

Thus, for example, if your technical score is 83% and your financial score is 77%, you will receive a total score of $83 * 70\% + 77 * 30\% = 58.1\% + 23.1\% = 81.2\%$.

Subject to the requirements in Sections 4 and 7, IUCN will award the contract to the bidder whose proposal achieves the highest total score.

5.6 *Interview Score*

The three or four bidders achieving the highest scores will be invited for an interview. We will communicate the expected content and format of the interviews as part of the invitation.

Interviews will be awarded an additional score out of 20.

5.7 *Final Score*

The Interview Scores will be added to the Total Scores to give a Final Score for each bidder.

Subject to the requirements in Sections 4 and 7, IUCN will award the contract to the bidder whose proposal achieves the highest final score.

6. **EXPLANATION OF PROCUREMENT PROCEDURE**

- 6.1. IUCN is using the Open Procedure for this procurement. This means that the contracting opportunity is published on IUCN's website and open to all interested parties to take part, subject to the conditions in Section 7 below.
- 6.2. You are welcome to ask questions or seek clarification regarding this procurement. Please email the IUCN Contact (see Section 2), taking note of the deadline for submission of questions in Section 3.1.
- 6.3. All proposals must be received by the submission deadline in Section 3.2 above. Late proposals will not be considered. All proposals received by the submission deadline will be evaluated by a team of three or more evaluators in accordance with the evaluation criteria stated in this RfP. No other criteria will be used to evaluate proposals. The contract will be awarded to the bidder whose proposal received the highest Total Score. IUCN does, however, reserve the right to cancel the procurement and not award a contract at all.

6.4. IUCN will contact the bidder with the highest-scoring proposal to finalise the contract. We will contact unsuccessful bidders after the contract has been awarded and provide detailed feedback. The timetable in Section 3.1 gives an estimate of when we expect to have completed the contract award, but this date may change depending on how long the evaluation of proposals takes.

7. CONDITIONS FOR PARTICIPATION IN THIS PROCUREMENT

7.1. To participate in this procurement, you are required to submit a proposal, which fully complies with the instructions in this RfP and the Attachments.

7.1.1. It is your responsibility to ensure that you have submitted a complete and fully compliant proposal.

7.1.2. Any incomplete or incorrectly completed proposal submission may be deemed non-compliant, and as a result you may be unable to proceed further in the procurement process.

7.1.3. IUCN will query any obvious clerical errors in your proposal and may, at IUCN's sole discretion, allow you to correct these, but only if doing so could not be perceived as giving you an unfair advantage.

7.2. In order to participate in this procurement, you must meet the following conditions:

- Free of conflicts of interest
- Registered on the relevant professional or trade register of the country in which you are established (or resident, if self-employed)
- In full compliance with your obligations relating to payment of social security contributions and of all applicable taxes
- Not been convicted of failing to comply with environmental regulatory requirements or other legal requirements relating to sustainability and environmental protection
- Not bankrupt or being wound up
- Never been guilty of an offence concerning your professional conduct
- Not involved in fraud, corruption, a criminal organisation, money laundering, terrorism, or any other illegal activity.

7.3. You must complete and sign the Declaration of Undertaking (see Attachment 2).

7.4. If you are participating in this procurement as a member of a joint venture, or are using sub-contractors, submit a separate Declaration of Undertaking for each member of the joint venture and sub-contractor, and be clear in your proposal which parts of the goods/services are provided by each partner or sub-contractor.

7.5. Each bidder shall submit only one proposal, either individually or as a partner in a joint venture. In case of joint venture, one company shall not be allowed to participate in two different joint ventures in the same procurement nor shall a company be allowed to submit a proposal both on its behalf and as part of a joint venture for the same procurement. A bidder who submits or participates in more than one proposal (other than as a subcontractor or in cases of alternatives that have been permitted or requested) shall cause all the proposals with the bidder's participation to be disqualified.

7.6. By taking part in this procurement, you accept the conditions set out in this RfP, including the following:

- It is unacceptable to give or offer any gift or consideration to an employee or other representative of IUCN as a reward or inducement in relation to the awarding of a contract. Such action will give IUCN the right to exclude you from this and any future procurements, and to terminate any contract that may have been signed with you.
- Any attempt to obtain information from an employee or other representative of IUCN concerning another bidder will result in disqualification.

- Any price fixing or collusion with other bidders in relation to this procurement shall give IUCN the right to exclude you and any other involved bidder(s) from this and any future procurements and may constitute a criminal offence.

8. CONFIDENTIALITY AND DATA PROTECTION

- 8.1. IUCN follows the European Union's General Data Protection Regulation (GDPR). The information you submit to IUCN as part of this procurement will be treated as confidential and shared only as required to evaluate your proposal in line with the procedure explained in this RfP, and for the maintenance of a clear audit trail. For audit purposes, IUCN is required to retain your proposal in its entirety for 10 years and make this available to internal and external auditors and donors as and when requested.
- 8.2. In the Declaration of Undertaking (Attachment 2) you need to give IUCN express permission to use the information you submit in this way, including personal data that forms part of your proposal. Where you include personal data of your employees (e.g. CVs) in your proposal, you need to have written permission from those individuals to share this information with IUCN, and for IUCN to use this information as indicated in 8.1. Without these permissions, IUCN will not be able to consider your proposal.

9. COMPLAINTS PROCEDURE

If you have a complaint or concern regarding the propriety of how a competitive process is or has been executed, then please contact procurement@iucn.org. Such complaints or concerns will be treated as confidential and are not considered in breach of the above restrictions on communication (Section 2.1).

10. CONTRACT

The contract will be based on IUCN's template in Attachment 3, the terms of which are not negotiable. They may, however, be amended by IUCN to reflect particular requirements from the donor funding this particular procurement.

11. ABOUT IUCN

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Headquartered in Switzerland, IUCN Secretariat comprises around 1,000 staff with offices in more than 50 countries.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,300 Member organisations and some 10,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being.

www.iucn.org

<https://twitter.com/IUCN/>

12. ATTACHMENTS

Attachment 1 *Specification of Requirements / Terms of Reference*

Attachment 2 *Declaration of Undertaking*

Attachment 3 *Contract Template*

Attachment 1 Specification of Requirements / Terms of Reference

1. **About PANORAMA – Solutions for a Healthy Planet**

PANORAMA - Solutions for a Healthy Planet is a partnership initiative, which identifies and promotes examples of tested and replicable “solutions” and enables their wider application through offering cross- sectoral global exchange opportunities, thus facilitating learning from successful practice in biodiversity conservation and sustainable use of natural resources. PANORAMA promotes solutions that demonstrate how well-protected biodiversity and well-managed ecosystems help address societal challenges and thereby achieve development benefits.

PANORAMA is a joint initiative of IUCN, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, the United Nations Development Programme, the United Nations Environment Programme, GRID-Arendal, Rare, IFOAM Organics International, the World Bank Group, ICOMOS, ICCROM, OCTO Group and EcoHealth Alliance with support from the German Federal Ministry for Environment, Nature Conservation and Nuclear Safety, (BMUV), the Norwegian Ministry of Climate and Environment and the Global Environment Facility. PANORAMA contributes to achieving the Sustainable Development Goals, the post-2020 Global Biodiversity Framework and the climate change adaptation and mitigation goals as defined under the UN Framework Convention on Climate Change (UNFCCC) and the Paris Agreement.

The function of the PANORAMA Secretariat is currently provided by IUCN and GIZ, which have each appointed staff to ensure the strategic advancement, coordination and administration of the initiative. PANORAMA is structured into so-called Communities, i.e. thematic chapters. Each Community is coordinated by staff of one or several of the PANORAMA partner organizations.

The *PANORAMA - Solutions for a Healthy Planet web* platform was launched in September 2016 during the IUCN World Conservation Congress in Hawai’i. The PANORAMA.solutions platform is the world’s leading online database and digital interface dedicated to unearthing proven solutions that work for nature and people across sectors. The PANORAMA web platform is a key tool for the initiative, as it serves both as the database of solution case studies, which are the substance of PANORAMA; and it also acts as the website for the initiative itself. The Secretariat oversees the development and management of the PANORAMA web platform. It currently features around 1,200 detailed solutions.

2. **Details of the Requirement**

IUCN invites you to submit a Proposal to relaunch the PANORAMA.solutions website and offer ongoing maintenance and service. The detailed description of the Requirement can be found in *Part 2 of this RfP*.

IUCN is seeking a contractor to relaunch and develop the PANORAMA.solutions website. The requirements for this project are detailed in this section. Further detailed requirements can also be found in section 7.

2.1 Current website

The website is managed jointly by IUCN and GIZ and is supported by an external website contractor, who maintains the website and provides technical advice regarding updates or improvements to the CMS and hosting. It is hosted on HostEurope server. IUCN and GIZ staff act as overall administrators of the platform. Each Community has its own section (“portal”) on the web platform, where all solutions relating to this Community are being displayed. The coordinators of the respective Community act as administrators for their portal of the web platform. They can review and publish solutions, manage users and comments

for their Community/portal.

This website was launched in 2016 and since then it has only had minor functionality updates to improve it. As technology evolves and the partnership is growing, the web platform needs to be updated. The current PANORAMA.solutions website is accessible via this address:

<https://panorama.solutions>.

The current web platform is built on Drupal 7 which is no longer supported after November 2023. This is the starting point for a more fundamental reconsideration of the platform’s IT system, structure, and functionalities. The technical documentation of the current PANORAMA web platform is described in the appendix. In addition to the fundamental need for a renewal, users of the platform have compiled a list of necessary and desirable improvements for the “future PANORAMA web platform”, which can also be found in the appendix.

The PANORAMA Live System is currently running on the following setup: Drupal 7.77 | Apache/2.4.39 (Ubuntu) | MySQL 5.7.26 | PHP 7.3.6. The PANORAMA Theme is currently based on the RADIX base theme (<https://www.drupal.org/project/radix>). However, the theme currently is using Bootstrap in Version 3 which is outdated. When migrating to Drupal 9 or 10, the Theme has to be updated to Bootstrap 4. Optionally, another base theme might be used which offers support for Bootstrap 5. Theme migration is quite complex, as most templates have to be rewritten or refactored when migrating from Bootstrap 3 to 4 or later.

Further information on the current technical installation (Contrib Modules, Custom Modules, Taxonomies, User Roles and the Review process) is provided in the appendix Part 7.1-7.6.

We do expect to migrate all existing pages and user accounts (migration requirements are described in *Part 2.11*).

2.2 Why do we need a relaunch?

The most important reasons why we have decided to relaunch the platform:

1. **Maintain security and improve reliability:** The current site is overextended technically, causing complications as well as security and reliability issues. Drupal 7 is reaching its end-of-life in November 2023.
2. **Improve user experience:** Serve a diverse range of users so that they can quickly find what they need and explore other content on a site that reinforces PANORAMA's strategic positioning and value.
3. **Strategic positioning:** The platform should continue to expand its dominant role as a "go-to" resource for good practices in nature conservation and broader sustainable development. In addition, the platform will in future increasingly be available as a database for other partner organisations and thus requires further interoperability.
4. **Interoperability and future orientation:** The platform is to be technically more strongly oriented towards interaction with other web platforms. Especially the provision of own data and the implementation of external data should be pursued.

2.3 *Scope of this RfP*

The contractor will need to provide and manage the end-to-end development, hosting and maintenance of the website, including (but not limited to) the following items:

- Development of the website based on the Information Architecture and Design provided by IUCN and partners
- Creation, testing and deployment of the automated migration of all content
- Creation of
 - new Landing pages / Views
 - a map explorer
 - embedded content options
- Improvements of the
 - Solution Review process (forms & backend)
 - feedback form
 - platform structure (portals)
 - Filter settings & content categorization options
 - API / Database Accessibility
 - Visual design, UI and UX in general
- Implementation of
 - a notification / subscribe system (newsletter / push notifications)
 - reviewer management system
 - calendar
- Testing and deployment of the website
- Hosting set-up and configuration
- Ongoing hosting monitoring and fine-tuning
- Ongoing support, maintenance and security management

- Training and documentation

Proposers should include information on how they will approach the end-to-end process. In addition, the proposers should also include in their proposals recommendations and a solid rationale for:

- Technical architecture (including CMS tool provider and all components/tools used)
- Content migration strategy to answer needs defined in *Part 2.11 Migration requirements*
- Deployment strategy
- Any third-party service required by the solution
- setting up website use statistics monitoring

Note that Information Architecture and Visual Design material will be provided (read below). Copy writing will be done by IUCN and partner organisations' staff. Proposers should focus primarily on the development of high quality user experience concepts. The whole list of features and explanations are in section 7.7.

The proposers are invited to demonstrate their competence by highlighting approaches or relevant previous experience in their proposal as specified in *Part 4.2 Technical information/Service Proposal*.

2.4 Objectives

As such, IUCN is soliciting proposals from contractors that would be able to provide cost-effective design, development, implementation and integration with existing platform functionalities of a new spatial component for the PANORAMA.solutions platform, that allows for the management, visualisation and mapping of different types of spatially explicit data, information and content types, while ensuring long-term sustainability and scalability of the proposed solution.

In redesigning the website, PANORAMA.solutions have the following goals and targets to guide this work and measure the success of the project.

Goals:

- An accessible website with ease of navigation, searching, and filtering content, leading to an enhanced user experience.
- A platform that provides functionality and opportunity for collaboration and knowledge sharing to increase the number of solutions and uptake stories.
- The adoption and embedding of Open Data standards and initiatives across the website to offer new engagement methods to build a more robust online community with new partner websites or databases.
- A one-stop platform of good practice cases (solutions) and related information for the practitioners, resulting in increased value for website users and donors.

The new website, including its information architecture and visual design, must support the general strategic objectives of PANORAMA initiative. The development phase of the website project contributes to these objectives in the following ways:

- 1. External users:** Users will find, engage with and explore content using the features and tools outlined in the architecture and visual designs, and they will do so as expected, without delays or

technical errors. Solution or Uptake story providers can enter their content intuitively.

2. Internal users: Platform administrators will have an intuitive CMS that encourages consistency while allowing flexibility and helps prevent mistakes or bad practice.

3. Collaboration partners: The interfaces and standards used make it possible to access external resources and help other content creators to integrate content from the platform.

4. Reliability and security: The site will perform as designed even at sustained peak use or under other technical stressors and it will be secure against outside threats and unexpected outages.

2.5 *Key audiences*

Our users are spread across most of the world's countries. Thus, multilingualism and the ability to operate in low bandwidth environments are vital requirements. Furthermore, our intended users are not necessarily mapping or IT specialists, and thus ease of use and intuitiveness are crucial aspects as well. The website has four priority audiences and several main audiences.

Priority audiences are:

1. **Solution seeker:** Conservation and sustainable development professionals, scientists, planners and policy makers and other practitioners. Need fast access to and organised displays of PANORAMA.solutions content, particularly solutions but also related PANORAMA knowledge products and information. Need to see a highly functional website that displays quickly and allows easy skimming and navigating content. In addition, they need to be able to work quickly with the information presented in different modes. The extraction of content is desired and should be technically simplified.
2. **Solution / uptake story provider:** Experts and practitioners with same background as above, who provide the content. They need a streamlined and simple process to add their content, as well as visibility for their content, and access to the network of other providers and seekers. The traceability of the submission process and the performance of the submission process are important criteria.
3. **Partner organisations / PANORAMA Community coordinators and platform admins** want an easy-to-use backend system, particularly for review of solutions, engaging external reviewers and communication with users; they also want visibility for their organisations and coordinator role, and the possibility to analyse the content and the engagement on a meta-level.
4. **Solution reviewers** need a simple and time-saving process to carry out the reviews in a transparent way and in good quality.

2.6 *Structure and Information Architecture*

The Full set includes:

- Analysis of the main personas
- The information architecture (target sitemap) for the website
- Recommendations in terms of user experience

- A draft list of content types and (new) taxonomies

2.7 Design

Following the branding guidelines, design a new look-and-feel for the PANORAMA.solutions site capturing the different functionalities outlined in this RfP. The proposer will develop a graphic concept and the visual language of the new templates. Ensure a consistent visual language on the new site by introducing fixed styles in templates ensuring consistency in fonts, formatting, icons, images, layout techniques. No complete redesign is expected. Instead, the bidder should build on the existing design.

[W3C Compliance standards](#) requirements for HTML, CSS and JQuery Library should be respected.

2.8 Interoperability and Open Standards

The usage of OSS, related open standards and open document formats is the main lever to promote and enforce concepts of data openness and interoperability. PANORAMA wants to support and encourage the use of data openness and interoperability in general, and specifically through our own example of using open standards and interoperability standards wherever possible. Each of the content types is published with a rich set of metadata which should be made available both in human and machine-readable formats.

API

The PANORAMA API allows you to display selected solution case studies on other websites. Only certain parts of the solution description can be called/accessed, these include several filters and sorting options to request the solutions data. The [documentation](#) of PANORAMA API can be found here.

API Creation / Design

- The software must support rapid development of REST APIs.
- The software must support model driven automated creation REST APIs

API Security / Access Control

- The software must support access control via role based permissions.
- The software must support the OAuth open standard for securing API access.
- The software must support security monitoring based on customizable security policies

Open Source Software

As a matter of principle, open-source and widely used technologies ([open-source software](#)) should be used to ensure that they can be freely used by third parties at a later date. Deviations must be justified in a comprehensible manner. Completely proprietary software solutions are ruled out. The use of completely self-developed website components without a high degree of Open Source Components should be justified. All technologies used or developed should therefore be licensed in such a way that the website as a whole can be reused as a white label solution.

2.9 Functionality requirements

Key functionalities

Key functionalities must include:

- **A CMS based on a robust and simple-to-use modular design system:** we want to allow content creation to leverage page templates, content types and components to allow the creation of visually appealing pages on desktop and mobile.
- **A cost-effective and scalable CMS:** we want a CMS that provides easy to use publishing tools to produce pages that have impact, is easy to use and is inexpensive to maintain. The webmaster team should be able to easily upload and change content across the site. Edits or new content must have the option to be previewed before being published.
- **A CMS able to support integrations and migration needs:** The desired CMS should work with widely used software libraries as far as possible. Standardised partial solutions are preferable to special solutions in order to increase technical sustainability and to avoid lock-in effects. We prioritize quality, robust and effective solutions that are simple to set up, enforce and maintain in the long term.

List of requirements

The following list acts as a detailed reference of the functional requirements of the new website, but also requirements of the wider solution and proposal. The relative prioritisation and importance on each requirement are indicated using the MoSCoW (*Must have, Should have, Could have, and Won't have*) method.

Reference	Requirement	MoSCoW
SITE CONFIGURATION AND DESIGN		
REQ-1	The site should be optimised for different browser platforms (Google Chrome, Internet Explorer, Firefox, Safari) and devices (desktop, mobile, tablets)	M
REQ-2	The site should support integrations for page analytics such as Matomo Analytics to collect more detailed traffic counts for specific pages and solutions that could be used for tracking effectiveness of communication activities, over periods and intervals that can be set for specific needs for thematic communities.	M
REQ-3	Public content on the site should be optimised for external search engines.	M
REQ-4	The site should provide a powerful search engine that enables users to search by keyword and filter results and sort by relevancy, date, or other options.	M
REQ-5	The site should be able to detect and identify broken links and alert site managers to repair them.	S
REQ-3	The site should have a event calender system.	M
REQ-4	Content should have version control and enable site managers to revert back to old published content versions as desired.	M
REQ-5	Site administrators should be able to create, change, and remove the taxonomies that are used to categorise content types throughout the site.	S
REQ-6	The site should be set up to support multiple languages	M
REQ-7	Site administrators should be able to review and modify translated content through a workflow mechanism prior to approval and publication on the website.	M
REQ-8	The site should be built so that site administrators can create new sections, pages, and components within pages without the need for technical development.	M

REQ-9	It should be possible to design and display different home landing pages based on whether a user is a visitor or logged into their profile.	M
REQ-10	The homepage should be able to pull the most recent content types from the respective areas across the website such as News (solutions, events or uptake stories etc).	M
REQ-11	It should be possible for site managers to change the layout of a page or new pages from within a predefined list of templates.	S
REQ-12	It should be possible to create sub-sites which can inherit features, user lists, and content from the parent site.	M
REQ-13	Sub-sites should be customisable with different colour themes, and several pre-defined page templates and layouts to choose from.	M
REQ-14	The site should have external functionality that offers reviewers a text collaboration with the content providers.	
FEATURES AND CONTENT		
REQ-15	The site should support content types such as solutions, uptakes news, events, files of various formats, multimedia, and profiles for users and other entities.	M
REQ-16	An autocomplete function facilitates the search input. Site managers should also be able to influence the search. E.g. by weighting or highlighting certain features or post types.	M
REQ-17	It should be possible for site managers to define content as being only displayed to users who are logged in, or public to all users and visitors of the site.	M
REQ-18	It should be possible to schedule the release and publication of content on the site.	M
REQ-19	The map explorer should have marker popups, clustering capabilities, and allow users to drill through from the map to the individual entity profiles.	M
REQ-20	The map explorer should allow users to search by key words, and filter by the various fields assigned to the different entity profiles.	M
REQ-21	The map explorer should allow users to easily switch between displaying either the organisations or projects over the same base map layer.	M
REQ-22	The map explorer should allow navigation between the displayed content (pins) on the map without having to reload the entire page.	M
REQ-23	The map explorer should display a short version of the solution and allow further navigation within this frame.	M
REQ-24	The site should support the embedding of maps and allow site editors to easily include maps in the various post types.	M
REQ-25	Filters should dynamically display the number of solutions assigned to them.	M
REQ-26	It should be possible to share content from external platforms such as Twitter, YouTube, and LinkedIn, in posts and messages.	M
REQ-27	It should be possible to share public site content on social media platforms such as Twitter, Facebook, and LinkedIn.	M
REQ-28	It should be possible to easily link and embed existing internal site content into written posts and messages. (M
REQ-29	It should be possible to embed feeds from external social platforms such as Twitter.	M
REQ-30	Users should have the option to sign up to a newsletter that is sent to personal email addresses for specific categories and organisations updates.	M
REQ-31	Users should have the option to sign up to a push notification for specific categories and organisations updates.	S
REQ-32	When users are viewing individual content, the site should highlight similar and related content they may be interested in.	M
REQ-33	All classifications on the solution sites should be clickable or lead to corresponding content.	M
REQ-34	It should be possible to embed site content (copy and paste) via iFrame in other CMS.	M
REQ-35	The site should be able to structure content in separate libraries or an hierarchical structure to make it easy to browse and find content and information.	M
REQ-36	The site should be able to display multimedia such as images and videos in galleries.	M

REQ-37	It should be possible for users to download content such as files or multimedia.	M
REQ-38	It should be possible for users to chose how they want to license their content (CC-License / Open Data-License)	M
REQ-39	should be able to review user submitted content prior to approval and publication on the website.	M
REQ-40	It should be possible for site administrators to add new content in bulk to content libraries.	S
REQ-41	The site should have functionality that enables users to content via a formular to the website and then be reviewed by other members.	M
REQ-42	The site should have external functionality that offers reviewers a text collaboration with the content providers.	M
PROFILES		
REQ-43	The site should allow users to create profiles with personalisation of details, privacy settings, and notifications.	M
REQ-44	Site administrators should be able to create, change, and remove, the information and fields required to be submitted by users on their profiles.	M
REQ-45	Users should be able to link and display their social network accounts to their profiles such as Twitter LinkedIn and website.	M
REQ-46	Users should be able to log in using existing information from social networks oder software companies such as Facebook, Twitter, LinkedIn, Google, Microsoft, Apple	C
REQ-47	It should be possible for users to find each other with simple search functionality through a directory of users with an ability to filter searches based on relevant fields.	M
REQ-48	Users should be able to send private messages to individual users or to a group of users containing text, images, or files.	S
REQ-49	A point system should exist to measure and display user engagement on the site. Points would be awarded for things such as submitting content, commenting or liking content, engaging in community activities.	S
REQ-50	User profiles should display all of the content and activity that an individual has contributed to the site.	S
REQ-51	The site should have a directory for organisational profiles which can be added by site administrators or users.	M
REQ-52	Site administrators should be able to create, change, and remove, the information and fields required to be submitted in an organisational profile.	M
REQ-53	Site administrators should be able to review user submitted organisation profiles prior to approval and publication on the website.	M
REQ-54	Functionality should exist that allows site administrators to display 'verification' tags or badges on organisational profiles to show that they have reviewed and authenticated.	M
REQ-55	It should be possible to create profiles for solutions associated to organisations. This would be hierarchical with one to many, one organisation to many solutions.	M
REQ-56	Users should be able to link their profiles to organisation profiles. This would work as one user to many organisations, and one organisation to many users.	M
REQ-57	Users should be able to suggest changes to information on organisation and project profiles, to be reviewed and approved by site administrators.	M
REQ-58	It should be possible to display content that has geolocations such as organisation profiles, or project profiles, as markers on an interactive map.	M
REQ-59	The site should support content editing including WYSIWYG editing, Microsoft word cut-and-paste, and provide support for rich text.	M
REQ-60	Users should be able to report content they deem to be inappropriate or wrong which will notify site managers for review.	M
REQ-61	Partner Organisations should be able to create public and private groups for collaboration with other members.	M
SITE MANAGEMENT		
REQ-62	Site administrators should be able to create, change, and remove 'roles' that enable certain site permissions to registered users.	M

REQ-63	Site administrators should be able to display and manage all content created by users.	M
REQ-64	Site administrators should be able to download and export all data relevant to each content type on the website.	M
REQ-65	Site administrators should be able to easily display and manage all user profiles created on the site.	M
REQ-66	Site administrators should be able to send messages to one or multiple users.	M
REQ-67	Site administrators should be able to track, analyse, and display various reporting metrics linked to site users, and various content types, on a daily/weekly/monthly basis.	M
REQ-68	Group owners should be able to nominate other group members as moderators with similar permission rights as the group owner.	M
REQ-69	The site should have functionality to host surveys and provide results and analysis to site managers	S
REQ-70	Clean URLs should be enabled to display readable urls	M
REQ-71	The site should have functionality to use of a GDPR-compliant open source software web analytics tool f.e. Piwik (Matomo) to measure performance and user engagement or or should continue the existing system	
REQ-72		
TRAINING AND DOCUMENTATION		
REQ-73	The supplier should ensure that all source code is stored in a suitable secure repository such as "Git".	S
REQ-74	The supplier will make the source code readily available to IUCN if and when required in the future	M
REQ-75	The supplier should offer training sessions for all of staff and volunteers to ensure they know how to manage the website and effectivity use all features.	M
REQ-76	The supplier should create easy to use guidelines and online manuals (or videoclips) to compliment the staff training and so that they can be referred to after training.	S
HOSTING, MAINTENANCE AND SUPPORT		
REQ-77	The supplier should identify and mediate several suitable hosting options.	M
REQ-78	Hosting suggestions must include service level agreements with a stated availability of at least 99.9%	M
REQ-79	The supplier should offer maintenance services which includes module upgrades, security patch updates, and ongoing site monitoring until the launch of the website.	M
REQ-80	The supplier should provide a mutually agreed service level agreement that covers low to high urgency issues and the relevant response times.	M

2.10 Migration requirements

2.10.1 Export-import mechanism

The contractor will automatize the migration of these contents:

Expected migration results includes the extraction of about 1400 articles with associated files, images, taxonomies and metadata from the current PANORAMA.solutions CMS, based on Drupal 7 and using a MySQL database, and the importing into the next website.

Migration deliverables are defined as follows and will be guaranteed through appropriate project management:

- Analysis of the current CMS and its export capabilities
- Creation, testing and quality assessment of the export-import mechanism for content
- Final import of the content in the new CMS (Drupal 9 or 10)

2.10.2 url structure migration for users and SEO

The contractor must make plans to ensure that SEO is not affected during the change from the old to the new website, noting that the Information architecture proposes a new navigation which will impact the url structure. The contractor should also have a tool to validate broken or stale links so that we may easily detect and then replace any links causing issues.

2.11 Accessibility

The website should adhere to the latest WCAG standards (2.1).

2.12 Browsers and device support

The website design should be fully adaptable across mobile, tablet and desktop - we welcome recommendations on whether a responsive design or adaptive web design is the best option.

The website should be mobile-first responsive design that considers users on mobile, tablet and desktop devices. The website should function for >iOS 13 and >Android 10.

The website should be supported by the most modern Web Browsers and Operating Systems below:

- Windows
 - Mozilla Firefox 106.0
 - Google Chrome 106.0
 - Edge 106 (Windows 10)
 - Opera 92.0
- Macintosh (MacOS)
 - Mozilla Firefox 106.0
 - Google Chrome 106.0
 - Safari 16
- Linux
 - Mozilla Firefox 40.0
 - Google Chrome 65.0
 - Opera 92.0

2.13 Security and legal

Maximum level of security, preventing breaches such as spam, viruses, phishing, DOS and DDOS attacks, site hijacking, unapproved posting and content, FTP access and personal information, content or database

thefts. The website must be SSL protected. IUCN will provide the SSL certificate information and the contractor will install it on the server.

Finally, the website must be compliant with GDPR and there must be a fully GDPR compliant Cookie Consent module included on the site. The contractor must also provide IUCN with details of all cookies applied to the site, to be used in the Privacy Policy (this does not need to be included in the proposal), as well as describe all personal data collected throughout the site and the reasons for the collection.

2.14 *Hosting, ongoing support and maintenance*

One month after its launch, the website will need:

- Modifications and improvements that do not modify the core structure of the website that will be developed;
- Standard maintenance, backup and updates to the server and the CMS environment;
- Security maintenance of all components/tools required by the website,
- Ongoing maintenance and improvement of SEO.

We are looking for a contractor who can help IUCN navigate technological decisions by clearly explaining the risks, benefits and potential alternatives for meeting certain objectives. The contractor should also be proactive in their maintenance of the website, offering advice and solutions to IUCN on an ongoing basis.

The maintenance and hosting of the site after this time will be contracted out separately for procedural reasons. It is intended to complete this assignment with the same provider. More detailed information about Drupal Cloud Hosting in section 7.8.

2.15 *Training*

The proposers should include development of a user manual and delivery of a webinar for the support staff and system administrators of all PANORAMA partner organizations to perform content upload, system maintenance and administration.

Conduct a webinar hands-on training on the following:

1. **Content management:** The content management training will cover the basic website management such as uploading of content, editing of web pages, navigation of pages and accessing the dashboard among others.
2. **Technical backend:** The technical backend training will cover the technical aspects of the website management such as website hosting, existing server specs, overview on how to configure the server to 'publish' the website, backup and restoration, advance options in Security, troubleshooting guide (Error codes).

2.16 Timeframe

The new website would ideally be ready for launch by 31 October 2023. The below target dates represent a general workflow toward the launch date. Items labelled TBD are items where IUCN will leave the delivery deadline to the Contractor so long as it occurs before the launch date or a suggested date in the Note column.

The production environment should be set up at a date to be discussed between IUCN and the contractor in order to allow enough time for content population before the launch.

Target dates	Item	Note
1 st month	Kick off	Goals and intermediate goals are known and defined (as alpha and beta version of the system)
1 st month	CMS set-up	All technical preparations are ready
2 nd month	Migration finished	All contents are transferred to the new system
3 rd month	Feature concept confirmation	The most important features are ready conceptualized
3 rd month	Design Concept confirmed	The design concept is ready and accepted
4 th month	Alpha version	The alpha version of the system is ready
4 th month	Validation	The system was tested and validated as provisionally good
5 th month	Beta Version	The beta version of the system is ready
5 th month	Validation	The system was tested and validated as provisionally good
6 th month	CMS training	Administrators and editors are familiarized with the new system
6 th month	All new Features implemented	All must-have features are functional
7 th month	Website go-live	The website is published
8 th month	Further development and monitoring	The usability and stability is monitored and small improvements are implemented

3. Technical information

3.1 Contrib Modules

Module	Description
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admin_menu	Provides a better Administration menu
admin_views	Used to display entities (users, content) as Drupal views
ajax_comments	„Ajaxifies" comments
backup_migrate	Used for Database Backups
better_statistics	Provides more options for statistics
better_exposed_filters	Checkboxes / radio buttons for exposed views filters
captcha	Currently not used
Ckeditor	WYSIWYG Editor, used for various textfields
countries	Used for displaying country names
ctools	Chaos tool suite. Required by many other modules like views, filed related modules, etc.
date	Provides date fields for cck module
diff	Used to compare differences between revisions of solutions within the review process for solutions
editor_note	Allows for adding notes on content fields. Used for the review workflow of solutions.
email	E-Mail field type
email_registration	Allows users to register with their e-mail address as username
entity	Entity API
entity_translation	Allows for translating entity api based content
reference_backreference	Allows for back-referencing entity content from another content
entityreference	Allows for referencing entities in fields entity
features	Used to deploy configuration as modules
features_extra	Not used
field_collection	Allows for grouping fields
field_group	Allows for grouping fields
file_entity	Used for managing files in fields, views,...
flag	Allows for flagging content. Used to bookmark / favour solutions.
geocoder	Used for coding locations into other GIS data types. Used for geocoding solutions.
geofield	Used for storing geo-data. Used for geocoding solutions.
geophp	Allows for using the geoPHP library.
globalredirect	Redirecting on path info.
honeypot	Honeypot for user registration
google_places_api_autocomplete	Not used
htmlmail	Allows for using HTML in system generated E-Mails
il8n	Used for translations / multi language content
imce	Image / file uploader
ip_geoloc	Used for displaying map data. MapBox is used as map provider.
jquery_update	JQuery Update module
leaflet	Used for rendering info on maps
leaflet_mapbox	Used for rendering info on MapBox maps
libraries	Used to integrate external libraries
leaflet_markercluster	Used for grouping markers at various zoom-levels on maps
link	Provides link field type
logintoboggan	Used for login process

magnific_popup	Popup solution used for file entity and image fields
mailsystem	Used for configuring mail functionality management
masonry	Used for displaying content in a grid based layout (e.g. on the landingpage)
masonry_views	Allows for using masonry display in combination with views
masquerade	Used to switch identities on the platform for testing / moderation / editing
matomo	Used for integrating matomo analytics
maxlength	Used for displaying the remaining characters on length-restricted input fields
media	Core media API
media_vimeo	Adds Vimeo as media provider
media_youtube	Adds Youtube as media provider
menu_attach_block	Allows for adding blocks to menu items
menu_attributes	Used for rendering additional attributes on menus / menu items
menublock	Allows for displaying menus as blocks
metatag	API / support for (automatically generated) meta tags
mimemail	Used for sending MIME E-Mails
modal_forms	Used for displaying forms as modals
module_filter	Allows for filtering modules according to their states or meta info
og	Organic Groups modules
paragraphs	Used for dynamically adding multiple content parts (paragraphs) to content
pathauto	Used for creating url paths based on content elements like the title
piwik	Not used. Tracking before matomo
profile2	Used for extended user profiles
publishcontent	Adds publish / unpublish links to content creation forms
redirect	Used for redirecting users in several cases
references_dialog	Used for adding new content inline when using entity references
responsive_favicons	Used for providing favicons in various formats
retinaimages	Provides retina effects in combination with the image module
save_draft	Allows for saving content in a draft state (unpublished)
search_api	The search API
search_api_db	Allows for storing the search index in the Drupal database
slick	Slick carousel. Used for several carousel implementations.
smtp	Used for sending system mails via an external smtp server
spamicide	Spam protection
strongarm	Enforces variables for modules. Used in combination with features
termreferencetree	Tree-based management of taxonomy terms
timeago	Allows for converting timestamps to relative time. Used in several places / views
title	Title field for entities - necessary for translating titles
token	UI for token management
transliteration	String / Character conversion by rulesets (used for uploads etc.)
views_filters_populate	Provides functionality for one exposed filter to search other filters as
variable	Variable API used by other modules

view_unpublished	Allows for setting roles which are able to view unpublished content views
views_ajax_history	Allows for browser bookmarking ajax based views
views_bulk_operations	Bulk operations on views based lists. Used e.g. for content and user
views_data_export	Allows for exporting views results
views_datasource	Allows for rendering views based content in various formats like JSON.
views_distinct	„Distinct" option for aggregating views content
views_load_more	Provides „show more ..." functionality for views results
views_send	Provides functionality to send view results a e-mail. Currently not used.
xautoload	PHP class loader
youtube	Youtube widget for fields
views	Basic module used for all views related functionality on the platform
views_argument_substitutions	Allows for using context arguments as tokens in views filters
views_autocomplete_filters	Autocompletion for views filters

3.2 Custom Modules

Module	Description	Loc
sp_building_block	Alters building block forms and submission	271
sp_deploy	Deployment module. Used to perform deployment tasks by	1456
sp_explorer	Implements functionality related to the „Explorer" - the Search API based part of PANORAMA which allows for searching and browsing solutions.	1896
sp_general	Various general helpers, changes, fixes. Mainly form altering, preprocessing and validation.	1352
sp_map	Customization for map functionality.	438
sp_mediathek	Minor functionality related to the „Mediathek". Rendering /	127
sp_news	Functionality related to the „News" section. Currently just	46
sp_orga_profile	Changes for the Organization profiles. Form altering, pre	671
sp_pages	RSS related custom functionality.	87
sp_panorama_api	API related functionality. Implements API Help Pages and minor API customization.	2885
sp_portal	Portal related functionality. Validation, rendering, altering forms, access related functionality, preprocessing.	3307
sp_privacy_video	Implements a 2-click solution for video content. Videos are loaded only after a user clicks on a placeholder (DSGVO / GDPR related functionality)	216
sp_review	Implements the review process. One of the most complex	2180 5
sp_review_comments	Functionality altering / extending the review process using	862
sp_socialmedia	Used for twitter related functionality. Fixes some cache related / access rights related issues when publishing a node to twitter. The module uses a custom AWS lambda implementation for generating the twitter stream displayed on the PANORAMA page.	335
sp_solution	Implements functionality for the „solution" content type. Alters forms, rendering, etc.	8190

sp_text	Various text-processing functionality. Extends ckeditor with Panorama specific requirements.	1.811
sp_user	Custom functionality for user registration, SPAM protection,	2.131
sp_youtube_editor	Adds the youtube plugin to ckeditor module.	31
tbodev	Used e.g. for rerouting e-mails in dev / staging environments, versioned update functions.	866

3.3 Content Types

Module	Description	Content types
Basic Page	Imprint, Terms of Use,...	4
Building Block	Building Blocks which are referenced by Solutions	1.863
Homepage	The PANORAMA Homepage. Only one instance.	1
Manual Page	Content type is used for providing a manual pages on how to use the PANORAMA platform	1
News	Content Type used for publishing news stories on the PANORAMA platform	34
Organisation Profile	Various organizations on the platform are represented using this content type	2.737
Partners Page	Used to display the partners of PANORAMA solutions	1
Portal	Content Type for Portals aka Thematic Communities. Content Type is used for the portal-landingpages	7
Resources	Resources (Images, Video-Links,Podcast-Links,...) which are presented in a „mediathek“	53
Solution	The core content type of the platform. Used to publish Solutions.	784

3.4 Taxonomies

Vocabulary	Description	# terms
Aichi targets	Solution categorization	20
Aichi targets other	Solution categorization	108
Business engagement approach	Solution categorization	6
Category	Building Block categorization	12
Category other	Building Block categorization	150
Challenges	Solution categorization	46
Ecosystem	Solution categorization	43
Ecosystem other	Solution categorization	212
Focus Topics		989
Governance type	Solution categorization	4
Phase of Solution	Building Block categorization	7
Region	Solution categorization	21
Scale	Building Block categorization, Solution Categorization	5
Sendai Framework	Solution categorization	8
Sustainable Development Goals	Solution categorization	17
Theme	Solution categorization	73
Theme other	Solution categorization	187
Urban and Disaster Risk Management	Solution categorization	5

3.5 User Roles

Title	Description
Anonymous User	Anonymous User / Visitor, not logged in
Authenticated User	Base role for registered users
Drupal Administrator	Admin
Ex-Expert / Admin	User who was an expert but not anymore
Expert	User who is able to review solutions
Platform Admin	User who is able to manage platform related content
Portal Admin	User who is able to administer portal related content
Solution Provider	User who is able to submit solutions
Testuser	Role for testing purposes

3.6 Review process

Solutions run through a peer review process between Solution provider, Portal admin and expert, before being published on the platform. A solution can go through several review cycles before being published.

There are various Communities (portals) responsible for the review of solutions, according to the main theme (Marine & coastal = PANORAMA Blue, Protected and areas = PANORAMA Conservation Areas etc.) the Solution provider has chosen for the solution.

Main solution states are:

- Draft
- Schedule review
- Submitted for review
- In review by
- Needs correction
- Dormant state (when Solution in review has not been opened/ edited for a period of time)
- Published
- Experts invited

Solution Provider Functionalities

- Create Full / Snapshot solution
- Save as draft
- Edit draft
- Submit for review
- Delete solution

- Add translation
- Preview solution
- Create new version (of published solution, e.g. translation into another language)
- Unpublish

Portal Admin Functionalities

- Schedule review
- Start review
- Add & manage experts
- Invite expert
- Get review back
- Leave comments
- Rate solution / building blocks (Ready for publication, needs correction)
- Delete solution
- Unpublish solution

Expert

Functionalities

- Finish review
- Start review
- Accept invitation to review
- Leave comments
- Rate solution / building blocks (Ready for publication, needs correction)

3.7 Feature descriptions

In addition to the core components of the website, there are a number of additional features that PANORAMA.solutions users value as unique selling points. The purpose of the following section is to broadly outline the reasons why each feature is valuable, how they may function at a high level, and identify examples that act as inspiration for PANORAMA.solutions.

3.7.1 Community & organisational profile management

The main purpose of this feature is to capture and display profiles of organisations and individual users that are submitted by site administrators and site users. Enhanced search functionality, including the ability to filter based on relevant profile fields, would make a significant impact. New functionality to create links between organisations to new project profiles would be valuable, and f.e. a simple 'verified' icon on profiles to show users that site administrators have validated profile information.

3.7.2 Map Explorer

Another feature that does already exist on the website, but requires improvements or new development is the map feature. This feature displays geodata, i.e. previews of solutions, and in the future the new solutions, in a visually attractive way and also allows site users to search with ease based on geographical locations. The interactive map acts as a gateway to click through and view individual solutions in more detail. The functionality of the map explorer is another feature that needs improving. It is hoped the new map will be layered so that users can switch views from different categorizations to solutions and back, with ease. Additional search and filtering abilities would also help the community to better find what they are interested in based on predefined field filters.

Examples:

- <https://worldheritageoutlook.iucn.org/>
- <https://explorer.land>

Desired features, capabilities, and qualities

- Turn data layers on and off
- Map navigation, including zooming, panning, and searching
- Custom queries of pre-calculated data
- Export maps with legends
- Draw new points and polygons – Backend editor
- Aesthetically attractive and styled in alignment with the design guidelines
- Ability to map data and have an interactive interface that displays descriptions and f.e. contact information of the solution provider;
- Ability to easily add links to reports and embed tables, charts, graphs and other data visualizations utilizing the data collected from communities and organizations.
- Custom Icon Image File, allows the definition of a unique custom Marker Icon, valid for all the Map Markers;
- Entity Type, allows the definition of different Marker Icons based on the View filtered Entity Types/Bundles; Taxonomy Term, allows the definition of different Marker Icons based on Taxonomy Terms reference field in View;
- List Type Field, allows the definition of different Marker Icons based on List (Options) Type fields in View;

Technical Requirements:

- Solution must at least maintain or improve existing functionality of the current platform
- Solution must allow for the integration, display and visualisation of different spatial data formats, at different level of disaggregation

- Solution must comply with international standards for spatial data and metadata, such as [OGC standards](#) (Geographic information - Metadata).
- Solution includes an interface for the customisation and management of data, metadata and visualisation - preferably Drupal-based.
- Solution must be flexible and adaptable to different content types
- Solution should allow for the generation of linked open data
- Solution must be responsive and work on mobile devices.
- Solution must work on a multilingual environment
- Solution should probably use OpenStreetMap as base layer; use of Google Maps would require further discussion and validation

3.7.3 Download Options

This feature will structure content in a clear and crisp way so that users can quickly download the documents and data in different appropriate formats (PDF/doc/csv) or be signposted to the original source.

3.7.4 Multilingual

PANORAMA.solutions currently operate English, French and Spanish versions of the website. Most static content has been translated in all languages. There are ambitions to increase the number of readable languages on the website. In addition to translating website interface and static content, a suitable translation tool would provide significant support to translate dynamic content to other languages. This would ensure the quality of content remains high with appropriate governance and processes wrapped around it. There would need to be appropriate profile roles with permissions and restrictions to enable this activity.

3.7.5 Engagement mechanisms

One of our key goals is to increase the number of uptake stories. In addition to general mechanisms such as users being able to comment on or like content, we have identified several features that we'd like to consider: e.g.the profile page could display member's activity and detail the various contributions and engagements they have made to the website.

3.7.6 User submitted content

PANORAMA.solutions publishes content (solutions) written and created by its members on a continuous basis, either following events such as a 'Call for solutions' or as ad-hoc submissions. We want to continue with this activity but wish to improve the efficiency with which it is done. There is a need to develop a system for submission of content to include a backend online peer review interface where peer reviewers with sufficient permissions can review, comment on and approve solutions in the CMS, before final publication on the platform by the content admin team. User content (solutions) is generally submitted via a form. There is a website feature for submission of solutions but this needs to be strengthened and streamlined.

A review and feedback system would enable site administrators to liaise with submitters in a controlled space and approve solutions once validated. To ensure all content remains relevant and up-to-date, enable automated alert system to indicate to users and alert (email) administrators and peer reviewers when resource or content page was last reviewed and date of next review and update. This system does not necessarily have to be based on the same system as the website. It only needs to be embedded in an efficient process without media discontinuity.

3.7.7 Search function

Autocomplete reassure the user when they see matches related to their query and often prompt them to add further details to the query for as long as relevant suggestions keep appearing. The site search will offer keywords relevant to the characters that are entered. The number of predictions should be adjusted depending on the screen. On mobile devices, the predictions should be less to not clutter the view for the user.

3.7.8 Subscription

Subscribe to specific categories via push notifications or email newsletter. Push notifications allows to segment your push notifications by user interest. If an user opts-in to push notifications, they will be subscribed to all categories of messages by default. If the user wants to, they can select individual categories to unsubscribe from to better serve their interests. Users will only receive push notifications for messages you send that are also associated with their selected categories. In addition, the newsletter subscription allows to receive updates via email after the registration.

3.7.9 Review process and collaboration management

Improve commenting function from scratch + text editing functions to see comments and the status of the review. This also includes the option of making comments more specifically to one specific section. PANORAMA has a database of external solution reviewers (=experts), currently housed on Google Docs with associated information for each reviewer (expertise, availability, prior reviews, etc). Currently, each reviewer needs to be “recreated” on the platform manually, and the associated information for each reviewer is not available on the PANORAMA platform. We need to integrate the current reviewer’s database in the platform and directly consult and add filters to select suitable reviewers for solutions review.

Ensure that review text/suggestions are being saved and accessible after they are sent to the solution provider. The whole history of review/editing the solution should be accessible and clearly visible to reviewers and admins.

3.7.10 Media & Data Licensing

In order to further prepare and facilitate “positive plagiarism”, there are both technical and legal consequences for the platform:

Creative Commons Licensing

In order to facilitate the re-use and distribution of content, all user generated content should be linked to specific terms of use. The content creator has the option to place his images under a [Creative Commons](#) license or to prohibit any further use.

Open Data

Analogous to the possibility of placing uploaded media content under certain rights of use (creative commons), data made available for download should be made available under an open data license in order to create legal certainty for users. F.e. [Open Data Commons Attribution License \(ODC-By\)](#)

3.7.11 Calendar

The website must provide a calendar so that the administrators can easily upload information on events organized by PANORAMA partners. The visitors must be able to view information through a calendar or through a list gathering of events related to the same subject or taking place during the same time frame. The administrators must be able to make some specific events more visible (highlighting) than others.

3.7.12 User Action Menu

A floating bar is a sticky bar that sticks to the top, bottom, or even the side of a web page. It remains at its position even as web visitors scroll down or up a web page. Like popups, they are used to prompt web visitors to take certain actions or give information about the next possible action.

The following actions should be visible on a solutions in the *user action* menu:

- Share & Embed
- Download (PDF)
- Provide a solution
- Create uptake story
- Notify me by changes (with newsletter or Push-notifications) (logged-in users)
- Save to my favorites (logged-in users)

3.7.13 API Performance Requirements

- Response Times: The API should respond within 1 second. This should be timed from the moment the API endpoint request is received to the time the response is sent.
- Load: The API can handle 10000 requests per hour within the 1-second response time limit.
- Concurrency: The API can handle 30 requests per second within the 1-second response time limit.
- Scalability: The API should be able to handle 50 separate API calls per second without degradation in performance
- Availability: Targeting 99.9% uptime for all API services.

3.7.14 Drupal Cloud Hosting Requirements

- Multiple instances per site – development, staging and production
- Structured deployment method that provides a seamless, streamlined code, database and asset deployment between development, staging and production environments.
- Smoothly scalable server performance and storage
- MINIMUM 99.9% uptime SLA
- Unlimited support including emergency support
- Site Monitoring
- Streamlined Drupal Updates
- Version Control
- Hardened Security which includes the following:
- Notification of client at all times regarding any changes and outages
- Authentication, authorization and access control
- Threat and vulnerability detection, implementation, and testing (facility, servers, network,storage)
- Technical consulting services
- Firewall, load balancer and intrusion prevention
- DDoS Protection Options
- Enterprise Admin Dashboard / Web Hosting Control Panel
- Automated backups and retention
- Role-based site access
- Speed and performance testing and optimization

Attachment 2 *Declaration of Undertaking*

DECLARATION OF UNDERTAKING in relation to RfP IUCN-24-01-P03463-1

I, the undersigned, hereby confirm that I am an authorised representative of the following organisation:

Registered Name of Organisation (the "Organisation"): _____

Registered Address (incl. country): _____

Year of Registration: _____

I hereby authorise IUCN to store and use the information included in the attached Proposal for the purpose of evaluating Proposals and selecting the Proposal IUCN deems the most favourable. I acknowledge that IUCN is required to retain the Proposal in its entirety for 10 years after then end of the resulting contract and make this available to internal and external auditors and donors as and when reasonably requested.

Where the Proposal includes Personal Data as defined by the European Union's General Data Protection Regulation (GDPR), I confirm that the Organisation has been authorised by each Data Subject to share this Data with IUCN for the purposes stated above.

I further confirm that the following statements are correct:

1. The Organisation is duly registered in accordance with all applicable laws.
2. The Organisation is fully compliant with all its tax and social security obligations.
3. The Organisation and its staff and representatives are free of any real or perceived conflicts of interest with regards to IUCN and its Mission.
4. The Organisation agrees to declare to IUCN any real or perceived emerging conflicts of interests it or any of its staff and representatives may have concerning IUCN. The Organisation acknowledges that IUCN may terminate any contracts with the Organisation that would, in IUCN sole discretion, be negatively affected by such conflicts of interests.
5. None of the Organisation's staff has ever been convicted of grave professional misconduct or any other offence concerning their professional conduct.
6. Neither the Organisation nor any of its staff and representatives have ever been convicted of fraud, corruption, money laundering, supporting terrorism or involvement in a criminal organisation.
7. The Organisation acknowledges that engagement by itself or any of its staff in fraud, corruption, money laundering, supporting terrorism or involvement in a criminal organisation will entitle IUCN to terminate any and all contracts with the Organisation with immediate effect.
8. The Organisation is a going concern and is not bankrupt or being wound up, is not having its affairs administered by the courts, has not suspended business activities, is not the subject of proceedings concerning those matters, or in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
9. The Organisation complies with all applicable environmental regulatory requirements or other legal requirements relating to sustainability and environmental protection.
10. The Organisation is not included in the UN Security Council Sanctions List, EU Sanctions Map, US Office of Foreign Assets Control Sanctions List, or the World Bank listing of ineligible firms and individuals. The Organisation agrees that it will not provide direct or indirect support to firms and individuals included in these lists.
11. The Organisation has not been, is not, and will not be involved or implicated in any violations of Indigenous Peoples' rights, or injustice or abuse of human rights related to other groups or individuals, including forced evictions, violation of fundamental rights of workers as defined by the International Labour Organization's (ILO) Declaration on the Fundamental Principles and Rights at Work, child labour, sexual exploitation, sexual abuse, or sexual harassment.

Supply of ...

<Date and Signature of authorised representative of the Proposer>

< Name and position of authorised representative of the Proposer >

Attachment 3 *Contract Template*

Below is the proposed Contract for the new PANORAMA web platform. IUCN reserves the right to amend the proposed Contract prior to signature but, in submitting a Proposal, Proposers acknowledge that this is a standard IUCN contract template and will only be amended at IUCN's discretion.



TEMPLATE CONSULTANCY AGREEMENT

[sections to be completed]

CONSULTANCY AGREEMENT

(the
“Agreement”)
between

IUCN, International Union for Conservation of Nature and Natural Resources, an international association established under the laws of Switzerland, with its World Headquarters located at Rue Mauverney 28, 1196 Gland, Switzerland (hereafter “IUCN”),

and

[full legal name of other party], [type of company] established under the laws of [name of country], with headquarters located at [address], [country] (hereafter “Consultant”)

IUCN and the Consultant shall be referred to herein individually as a “Party” and together as the “Parties”.

PREAMBLE

Whereas the mission of IUCN is to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable;

Whereas IUCN wishes to obtain advisory and consulting services from the Consultant for website development, maintenance [and hosting] services and the Consultant agrees to assist IUCN with such services under the terms and the conditions set forth in this Agreement.

Whereas the Consultant has represented to IUCN that it has the required expertise and experience;

Now therefore the Parties agree as follows:

1. SERVICES

1.1 The Consultant will [short description of the services], perform the tasks and deliver the deliverables no later than the agreed deadline(s) as set out in the terms of reference attached as Annex I (the “Services”).

1.2 The Consultant will assign [name of the person(s) and title(s)] (the “Key Personnel”), who is/are(an) employee(s) of the Consultant, to the performance of the Services on behalf of the Consultant. The replacement of any Key Personnel must be approved in advance by IUCN in writing.

1.3 IUCN reserves the right to request any reports (progress, financial or otherwise additional to those required under the Agreement), which could be considered to be reasonably required to evidence satisfactory performance under the Agreement. All financial records and other relevant documents relevant to or pertaining to this Agreement may be subject to inspection and/or audit at the discretion of IUCN or of the Donor. The Consultant agrees to allow IUCN or Donor's auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. In the event of inspection or audit, IUCN or Donor shall provide the Consultant reasonable prior written notice.

1.4 The Consultant shall not subcontract the Services to third parties without the prior written consent of IUCN. However, the Consultant may under its own responsibility use the services of others provided such services are of an auxiliary or clerical nature.

2. TERM

This Agreement comes into effect on [date] [or] [upon its signature by both Parties] (the “Effective Date”) and will expire on [date] (the “Expiration Date”).

3. INDEPENDENT STATUS

3.1 The employees, directors or shareholders of the Consultant shall not be entitled to any pension, bonus or other fringe benefits from IUCN.

3.2 The Consultant shall have no authority to enter into contracts or to incur any other legally binding commitment on behalf of IUCN.

3.3 No employee, director or other representative of the Consultant shall hold him or herself out or permit itself to be held out as having authority to do or say anything on behalf of or in the name of IUCN.

3.4 The Consultant shall be solely and exclusively liable for any and all taxes, levies or dues required to be paid in any of the countries where this Agreement applies, on any amounts paid to the Consultant by IUCN and has sole responsibility for declaring such amounts to the relevant tax authorities.

4. OBLIGATIONS

4.1 The Consultant shall carry out its duties in an expert and diligent manner and to the best of its ability and shall promptly and faithfully comply with all lawful and reasonable requests which may be made by the IUCN Contact Person.

4.2 The Consultant shall give written or oral advice or information regarding the execution of the Services as and when required by IUCN.

4.3 In the case of illness or accident or a case of Force Majeure as described under clause 16.3 preventing the Key Personnel from performing the Services, the Consultant shall promptly notify IUCN in writing of impediment.

5. REMUNERATION

5.1 As full remuneration for the Services performed under the terms of this Agreement, IUCN shall pay the Consultant a fixed and firm lump sum of [currency/amount in numbers (amount spelled out in letters)] (“the Remuneration”) based on [number of days] days of work at a daily rate of [daily rate] as follows:

5.1.1 A first instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration upon receipt of a signed copy of this Agreement together with a first invoice;

5.1.2 A second instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to 30% of the Remuneration [please indicate what task(s)/deliverable(s) will trigger payment] and presentation of the corresponding invoice; and

5.1.3 A third and last instalment of [currency/amount in numbers (amount spelled out in letters)] corresponding to remaining 40% of the Remuneration upon satisfactory and timely completion and IUCN written acceptance of all Services as specified in Annex I. The final invoice must be submitted no later than [insert the no. of days e.g. 30 days]

after IUCN's written acceptance of all Services or after the Agreement end date whichever is later.

5.2 The Consultant must submit a valid invoice quoting the Contract Reference Number and number of the instalment for each payment to be made.

5.3 If the tasks defined in the Agreement are not fulfilled to the satisfaction of IUCN within the requested time limit, IUCN reserves the right to withhold any further payments and recuperate any funds already paid for unfulfilled Services.

5.4 IUCN shall make payments to the Consultant's bank account (to be opened in the name of the Consultant in the place where Consultant is established or where the Services are provided) as follows:

Complete Account name: [xxx]

Account type and currency:

[xxx] Bank name: [xxx]

Bank address:

[xxx] Account No.:

[xxx]

SWIFT Code or other bank routing code: [xxx]

IBAN No: [xxx]

5.5 The Consultant shall bear bank charges for international wire-transfers (namely from the Consultant's bank or any intermediary banks) associated with any transfer of funds that IUCN may make hereunder.

5.6 Funds that remain unused at the Expiration Date or termination date of this Agreement must be returned to IUCN within sixty (60) days following either of such dates, as applicable.

6. TRAVEL EXPENSES

Not applicable.

7. CONSULTANT'S WARRANTIES AND UNDERTAKINGS

7.1 The Consultant warrants that its performance of the Services under the terms of this Agreement will not infringe on the rights of any third party or cause the Consultant to be in breach of any obligation towards a third party.

7.2 The Consultant warrants that it has obtained the assignment of all Results and Intellectual Property rights pertaining to the Results from his employees (including without limitation the Key Personnel).

7.3 The Consultant shall maintain at its sole expense liability and any other relevant insurance covering the performance of this Agreement. IUCN may require the Consultant to provide a certificate of insurance evidencing such coverage.

7.4 The Consultant represents and warrants that no part of the Remuneration shall be provided to, or used to support, individuals and organizations associated with terrorism as identified on any sanction list published by the European Union, the United States Government, the United Nations Security Council or other relevant agency or body.

8. CONFIDENTIALITY

8.1 The Consultant will not disclose or use, at any time during or subsequent to this Agreement, any confidential information of IUCN or any other non-public information relating to the business, financial, technical or other affairs of IUCN except as required by IUCN in connection with the Consultant's performance of this Agreement or as required by law. In particular, but without prejudice to the generality of the foregoing, the Consultant shall keep confidential all Intellectual Property and know-how disclosed to it by IUCN, which becomes known to it during the period of this Agreement or which it develops or helps to develop in providing the Services to IUCN.

8.2 The Consultant may communicate confidential information only to those of its employees who are directly and necessarily involved in the performance of this Agreement or who are bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.3 The Consultant shall:

8.3.1 not disclose to third parties (including news and social media) without express prior written consent of IUCN the contents of this Agreement and the results of work performed as part of the provision of the Services;

8.3.2 disclose know-how and other confidential information of IUCN which is provided by IUCN to the Consultant for the purpose of carrying out the Services only to those persons necessary to accomplish the Services and only to the extent necessary for the proper performances of the Services or to persons bound to the Consultant by obligations no less stringent as the ones mentioned in this Agreement.

8.4 The Consultant agrees to immediately notify IUCN in writing if it becomes aware of any disclosure in breach of the obligations of this clause 8. It shall be responsible for any breach of these obligations by its employees or subcontractors. The Consultant will take all steps necessary to prevent further disclosure.

9. PROPERTY OF RESULTS

All notes, memoranda, correspondence, records, documents and other tangible items made, by the Consultant in the course of providing the Services will be and remain at all times the property of IUCN. At any time, even after the termination of this Agreement, the Consultant shall, upon request, promptly deliver to IUCN all such tangible items which are in its possession or under its control and relate to IUCN, its business affairs and clients and/or the Services.

10. INTELLECTUAL PROPERTY

Intellectual Property rights are any and all rights and prerogatives, registered or not, arising from the Swiss and international legislation on the protection of notably patents, design, trademark, as well as know-how and trade secrets.

Pre-existing Intellectual Property (Pre-existing Rights”) of a Party means any rights, title and interests in, to and under any and Intellectual Property that have been conceived or developed by such Party prior to the Effective Date or that is conceived or developed by such a Party at any time wholly independently of the implementation of this Agreement. Subject to the rights and licenses expressly granted under this Agreement, each Party shall retain ownership of its Pre-existing Rights. The Consultant hereby grants to IUCN a non- exclusive, worldwide, perpetual, royalty free, sub-licensable license to use Pre-existing Rights incorporated in the Services. The Consultant shall ensure that it has obtained all the rights to use any Pre-existing Rights belonging to third parties that are necessary to implement this Agreement.

All Intellectual Property rights, including copyright, in the Services produced under this Agreement are vested in IUCN and the Consultant hereby assigns and agrees to assign to IUCN, with full title guarantee, all rights in and to any Intellectual Property resulting from the implementation of this Agreement for the full duration of such rights, including, without any limitations, the right to use, publish, license, translate, sell or distribute, privately or publicly, any item or part thereof wherever in the world enforceable.

The Consultant confirms that IUCN shall have all rights of development, manufacture, promotion, distribution and exploitation in relation to the projects undertaken and products developed in the course of the provisions of the Services and the Intellectual Property created or arising from the provision of the Services.

Neither Party shall have the right to use the other Party’s name, logo and/or other trademarks in any medium and for whatever purpose without the other Party’s prior written consent in each instance of use.

11. LIABILITY AND INDEMNITY

11.1 IUCN shall not be held liable for any damage caused or sustained by the Consultant, including any damage caused to its employees and / or third parties as a consequence of or during the provision of the Services or the implementation of the Present Agreement.

11.2 The Consultant agrees to indemnify and hold IUCN harmless from any and all losses and damages that IUCN may incur as a result of Consultant's actions or omissions in rendering the Services or the breach of any of the Consultant's obligations contained in this Agreement.

12. COMMUNICATION AND NOTICES

12.1 All correspondence and notices in connection with the implementation of this Agreement must be directed as follows:

IUCN Contact Person	Consultant Contact Person
[name]	[name]
[title]	[title]
[name of IUCN Programme/Office]	[address]
[address]	[phone]
[phone]	[email]
[email]	

12.2 In case the Contact Person is being changed, the authorized representative of each Party shall notify the other Party in writing (email accepted).

13. ETHICS, FRAUD AND CORRUPTION

13.1 The Consultant shall comply with the principles and expected standards of conduct equivalent to those stipulated in Section 4 of the Code of Conduct and Professional Ethics for the Secretariat, available at https://www.iucn.org/downloads/code_of_conduct_and_professional_ethics.pdf, which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.2 The Consultant shall take all necessary measures to prevent any situation where the impartial and objective implementation of the Agreement is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest.

13.3 The Consultant represents and warrants that there are no potential or actual conflicts of interests in relation to the implementation of this Agreement. If, during the course of this Agreement, the Consultant becomes aware of facts which constitute or may give rise to a conflict of interest, the Consultant shall promptly inform the IUCN Contact Person in clause 12.1 in writing, without delay. The Consultant shall immediately take all the necessary steps to rectify this situation. IUCN reserves the right to verify that the measures taken are appropriate and may require additional measures to be taken within a specified deadline.

13.4 The Consultant shall take all necessary precautions to avoid fraud and corrupt practices in implementing this Agreement. The Consultant shall comply with the standards of conduct equivalent to those stipulated in IUCN's Anti-fraud Policy, available at https://www.iucn.org/downloads/anti_fraud_policy.pdf, which by signing this Agreement, the Consultant confirms it has reviewed and accepted.

13.5 The Consultant shall cooperate fully in any investigations linked to events under this clause which may be carried out by IUCN and/or the Donor and shall give access to all records (and to its staff if applicable) in the event that this is needed to support investigations of complaints of unethical behavior, fraud or corruption. IUCN reserves the right to take necessary legal action and/or terminate the Agreement in accordance with clause 16 if it determines that any fraud, corruption and/or unethical behaviour has occurred. Any repayment claim may also include interest, investment income or any other financial gain obtained as a result of the fraud.

14. NON-DISCRIMINATION AND POLICY ON THE PROTECTION FROM SEXUAL EXPLOITATION, SEXUAL ABUSE, AND SEXUAL HARASSMENT (SEAH POLICY)

14.1 IUCN recommends the Consultant to apply non-discriminatory practices in terms of benefits and remuneration for both men and women employees in the performance of this Agreement.

14.2 The Consultant will comply with the principles and standards of protection equivalent to those stipulated in the SEAH Policy available at https://www.iucn.org/sites/dev/files/seah_revised_version_2020apr27.pdf

15. PROCESSING OF PERSONAL DATA

15.1 Personal Data is any information relating to an identified or identifiable individual, unless otherwise defined under applicable law. The Parties commit themselves to respect applicable data protection laws and regulations and process Personal Data in accordance with the terms of this Agreement.

15.2 IUCN may share Personal Data of the Consultant and / or Consultant Key Personnel with the Donor and other IUCN partners strictly involved in the implementation of the Project. The Consultant will have the right of access its Personal Data and the right to rectify any such Personal Data held by IUCN. If the Consultant has any queries concerning the processing of Personal Data, it shall address them to IUCN using the online form located at (<https://portals.iucn.org/dataprotection/requestform>).

15.3 IUCN may in the course of performance of this Agreement provide the Consultant with Personal Data. The Consultant shall limit access and use of Personal Data to that strictly necessary for the performance of this Agreement and shall adopt all appropriate technical and organizational security measures necessary to preserve the strictest confidentiality and limit access to Personal Data.

15.4 Where the Consultant engages another processor for carrying out specific processing activities on behalf of

IUCN, the same data protection obligations as set out in this Agreement and the applicable law shall be imposed on that other processor by way of an agreement. Where that other processor fails to fulfil its data protection obligations, the Consultant shall remain fully liable to IUCN for the performance of that other processor's obligations.

15.5 Where Personal Data is transferred to a country that has not been deemed to provide an adequate level of protection for Personal Data or to an International Organization within the meaning of Regulation (EU) 2016/679, the Consultant shall ensure that appropriate safeguards in accordance with applicable law are provided.

15.6 The Consultant shall promptly, and in any case within twenty-four (24) hours inform IUCN through the online form located at (<https://portals.iucn.org/dataprotection/requestform>), if it determines and/or discloses to a competent public authority and/or affected data subjects that a Personal Data breach has occurred.

16. TERMINATION

16.1 Termination for cause

16.1.1 IUCN reserves the right to terminate this Agreement in whole or in part, upon written notice with immediate effect in the event that the Consultant:

- i. has falsified or provided inaccurate, incomplete or misleading information in any documentation provided to IUCN;
- ii. defaults in carrying out any of its obligations under this Agreement;
- iii. has engaged in illegal acts, including, without limitation fraudulent or corrupt actions as defined in Code of Conduct and Professional Ethics for the Secretariat and IUCN's Anti-fraud Policy (hereafter referred to as a "Fraud");
- iv. enters into liquidation or dissolution other than for the purpose of an amalgamation or reconstruction; or
- v. ceases to carry on business, has a receiver or administrator appointed over all or any part of its assets or undertaking, enters into any composition or arrangement with its creditors or takes or suffers any similar action in consequence of a debt or other liability, or undergoes any process analogous to the foregoing in any jurisdiction throughout the world.

16.1.2 If it is determined that the Consultant has committed Fraud in competing for or in the performance of this Agreement, all expenditures incurred under this Agreement shall be undue and the Consultant shall promptly reimburse IUCN for all expenditures incurred in the performance of this Agreement.

16.2 Termination for lack of Donor funds Not applicable.

16.3 Termination for force majeure

16.3.1 The performance of this Agreement by either Party is subject to acts of God, war, government regulations, epidemics, pandemics, disaster, strikes (excluding strikes of respective Parties' personnel), civil disorders, curtailment of transportation facilities, or other emergencies making it illegal or impossible for either Party to perform its obligations ("Force Majeure Event"). The Party subject to a Force Majeure Event shall promptly notify the other Party of the occurrence and particulars of such Force Majeure Event, including how it impacts the performance of its obligations under this Agreement. The Party so affected shall use diligent efforts to avoid or remove such causes of non or delayed performance as soon as is reasonably practicable.

16.3.2 This Agreement may be terminated unilaterally without compensation for any one or more of the foregoing reasons by written notice from one Party to the other.

16.3.3 Notwithstanding the above, the Parties may agree to a suspension or an extension of the Agreement as deemed appropriate. Upon termination of the Force Majeure Event, the performance of the suspended Services shall without delay recommence.

16.3.4 The Party subject to the Force Majeure Event shall not be liable to the other Party for any damages arising out of or relating to the suspension or termination of Services by reason of the occurrence of a Force Majeure Event, provided such Party complies with all the requirements under this clause 16.3.

16.4 Effects of Termination

In the event of termination under this clause, IUCN shall pay the Consultant any outstanding Remuneration in respect of Services performed by the Consultant up until the effective date of termination, it being understood that the total amount payable by IUCN to the Consultant shall not exceed the Remuneration stated in clause 5 of the Agreement. The Consultant shall within thirty (30) days of termination, and at IUCN's request:

16.4.1 to the extent possible, complete the Services subject to the Remuneration made available until the date of termination and stop all ongoing activities;

16.4.2 refund to IUCN any advance payments received in excess of the total expenditure incurred as evidenced in the invoices submitted to IUCN,

16.4.3 reimburse IUCN for any expenditures made in breach of the terms of this Agreement and

16.4.4 submit final technical and financial reports and any other materials, deliverables, works or other outputs created as at the date of termination under this Agreement.

17. APPLICABLE LAW AND DISPUTE RESOLUTION

17.1 The performance and interpretation of this Agreement will be subject exclusively to the laws of Switzerland, excluding its conflict of laws principles.

17.2 Any dispute arising out of or in relation with this Agreement that cannot be resolved amicably by the Parties or by way of mediation shall be submitted to the competent courts of Lausanne, Switzerland.

18. GENERAL PROVISIONS

18.1 This Agreement is the complete understanding between IUCN and the Consultant and replaces all other agreements and understandings in reference to the subject matter of this Agreement.

18.2 Any modification or amendment of this Agreement shall be in writing and shall become effective if and when signed by both Parties.

18.3 This Consultancy Agreement is non-exclusive. IUCN is free to consult other experts in the Consultant's field of specialization.

18.4 This Agreement is personal to IUCN and the Consultant, and neither Party may sell, assign or transfer any duties, rights or interests created under this Agreement without the prior written consent of the other.

18.5 Either Party waives all and any rights of set-off against any payments due hereunder and agrees to pay all sums due hereunder regardless of any set-off or cross claim.

18.6 All provisions that logically ought to survive termination of this Agreement shall survive.

This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The Parties agree that the signed counterparts may be delivered by e-mail in a ".pdf" format data file or electronic signature (e.g., DocuSign or similar electronic signature technology) and thereafter maintained in electronic form, and that in this case such signature shall create a valid and binding obligation of the party executing with the same force and effect as if such ".pdf" or electronic signature page were an original thereof.

Signed on behalf of:

Supply of ...

IUCN, International Union for
PARTY Conservation of Nature and
Natural Resources

[full name of OTHER]

Date: _____

Date: _____

[Name of representative]

[Name of representative]

Supply of ...

[Position of representative]

[Position of representative]

ANNEXES

Annex 1 – RFP

Annex 2 – bidder’s proposal

And additional annexes if applicable