**"Modernizing Uzbekistan National Innovation System (MUNIS)" Project**
**Ministry of Higher Education, Science, and Innovations of the Republic of Uzbekistan**

**Terms of Reference**
**Title of Assignment: Consulting company for the implementation of Document Management System at IAIS and conduct trainings on its application**

## BACKGROUND

In 2024, the Institute for Advanced International Studies at the University of World Economy and Diplomacy was awarded a Public Research Institutes Modernization Program (PRIM) grant by the Project Implementation Unit of the "Modernizing Uzbekistan National Innovation System (MUNIS)" project under the Agency for Innovative Development. The awarded grant amount is $195,600 and its implementation period from December 2024 to December 2025. Within the given grant, the title of the IAIS institutional modernization plan is "Building Institutional Capacity for Sustainable Futures: A Pathway to Competitiveness in Central Asia and Beyond".

MUNIS PRIM grant program is envisaged under the Subcomponent 1.3 - Public Research Institutes Modernization of the MUNIS Project. The MUNIS Project Development Objective (PDO) aims to enable the development of a market-oriented national innovation system in Uzbekistan. Long-term priorities of national science and innovation sector transformation are defined in the Concept of Uzbekistan Science Development until 2030 (Presidential Decree PF-6097, 29.10.2020).

This strategic concept defined goals and targets for transformation of public management of science, improving science funding mechanisms, diversification of sources for financing, modernization of research infrastructure, and developing data and information systems. In particular, the Concept indicates a comprehensive approach to the transformation of PRIs and envisages scientific infrastructure update, as well as cooperation of institutions with enterprises in the real sector of economy, creation of innovative enterprises, cooperation between various actors of the national innovation infrastructure (institutes, foundations, laboratories, scientific and technical parks, etc.), improving management, planning and forecasting of PRIs, better community outreach of PRIs to increase awareness of society on societal and economic benefits of scientific programs.

Through this grant, IAIS seeks to strengthen its institutional capacity to tackle the interconnected challenges of sustainable development, water and climate diplomacy, energy diplomacy, international trade, and related areas. This project is aligned with IAIS's strategic vision to establish itself as a regional leader in research, policy dialogue, and practical solutions, enhancing its competitiveness while shaping global policy frameworks.

Central Asia faces pressing challenges at the nexus of environmental sustainability, international trade, and energy security. With Uzbekistan's ongoing efforts to join the World Trade Organization (WTO) and the region's struggles with climate change, water scarcity, and energy transition, there is a critical need for rigorous research and informed policy guidance. IAIS, leveraging its expanding centers and interdisciplinary expertise, is well-positioned to provide such leadership but requires further capacity building to achieve its full potential. This project aims to enhance IAIS's ability to deliver high-impact research and policy solutions that support sustainable development and regional growth.

**The project has three core objectives:**

**1. Upgrading Research Infrastructure and Data Exchange:** Modernize IAIS's digital platforms to support diverse research topics by developing an internal data management system and securing access to external databases.

**2. Promoting Strategic Collaboration:** Strengthen partnerships with industries, international organizations, and research institutions to foster joint research and knowledge exchange.

**3. Building Institutional Capacity:** Enhance IAIS's capabilities through staff training in research methods, resource mobilization, leadership development, and governance, ensuring long-term policy influence and research excellence.

## ASSIGNMENT OBJECTIVE & BUDGET

This TOR is to hire a consultant company that will support IAIS in implementing a robust Document Management System (DMS) to enhance its internal document handling, collaboration, and information security under Pillar A – Research Infrastructure, Subcomponent 1.1. The above work shall be carried out by the Consultant company on-site with possible involvement of the Consultant's experts.

## SCOPE AND CONTENT OF SERVICES

The Institute of Advanced Information Studies (IAIS) is committed to enhancing organizational effectiveness and operational excellence by strengthening its internal systems and staff capabilities. In pursuit of this goal, IAIS seeks to engage a qualified consulting firm to design, deliver, and operationalize a comprehensive Document Management System (DMS) and conduct associated staff training.

The primary objective of this engagement is to develop and deploy a robust, user-friendly DMS tailored to IAIS's requirements, supported by detailed user manuals, practical tools, and accessible training resources. The consultant will be responsible for ensuring the system enables efficient document creation, editing, storage, retrieval, and collaboration. In addition, the consultant will build staff capacity through structured training workshops, enabling effective adoption and utilization of the DMS. The consultant will also provide comprehensive user support materials and implement a performance analytics dashboard to monitor system usage and efficiency, thereby fostering a culture of digital best practices across the Institute.

As part of the provision of services, the consultant will be responsible for the following key actions:

### 1. Assessment and Planning

- Conduct a thorough needs assessment to understand IAIS's current document management practices, challenges, and specific requirements.
- Review existing IT infrastructure and recommend necessary upgrades or integrations to support the DMS.
- Develop a detailed implementation plan, including timelines, milestones, and resource requirements.
- Engage key IAIS stakeholders to ensure alignment with organizational goals and user expectations.

### 2. Design and Development of Document Management System

- Design a scalable, secure, and user-friendly DMS tailored to IAIS's operational needs.
- Configure system functionalities to support:
  - Document creation, editing, and version control.
  - Secure storage and organized archiving.
  - Efficient document retrieval through advanced search capabilities.
  - Collaboration features enabling multiple users to work on documents simultaneously.
- Implement role-based access controls and data security protocols to ensure confidentiality and compliance.
- Customize the system interface for ease of use and accessibility.

### 3. Deployment and Integration

- Install and deploy the DMS within IAIS's IT environment.
- Integrate the DMS with existing enterprise applications and workflows where applicable.
- Conduct system testing to validate functionality, performance, and security.
- Provide technical support during the initial rollout phase to address any issues promptly.

### 4. Training and Capacity Building

- Develop a comprehensive training curriculum covering all aspects of the DMS.
- Organize and conduct at least two (2) training sessions/workshops for IAIS staff:
  - Session 1: Introduction to the DMS, covering basic features such as file management, document search, and collaboration tools.
  - Session 2: Advanced functionalities, troubleshooting, and best practices.
- Utilize interactive and practical training methods to enhance learning and retention.
- Gather participant feedback to evaluate training effectiveness and identify areas for improvement.

### 5. Development of User Support Materials

- Prepare detailed user manuals that clearly explain system features and workflows.
- Develop FAQs addressing common user questions and challenges.
- Produce step-by-step video tutorials demonstrating key tasks within the DMS.
- Ensure all materials are accessible, easy to understand, and available in digital formats for ongoing reference.

### 6. Performance Analytics Dashboard

- Design and implement a dashboard within the DMS to monitor key performance indicators, including:
  - Frequency and volume of document uploads.
  - Search efficiency metrics such as average search time and success rates.
  - System performance indicators, including uptime and response times.
  - User engagement and adoption statistics.
- Train designated IAIS personnel on how to interpret dashboard data and utilize insights for continuous improvement.

### 7. Reporting and Documentation

- Provide regular progress reports throughout the engagement, highlighting achievements, challenges, and next steps.
- Submit a comprehensive final report summarizing the implementation process, training outcomes, user feedback, and recommendations for future enhancements.

## DURATION OF THE ASSIGNMENT

The contract period is **4 months, tentatively scheduled from June 20, 2025, to October 20, 2025.** Extension of the contract may be considered based on project outcomes and evolving business requirements. Training is anticipated to be delivered as a 3-day, in-person workshop. The training schedule will be designed to include interactive sessions, regular breaks, and practical exercises to ensure maximum engagement and effective learning.

## EXPECTED DELIVERABLES

The table below shows the key deliverables of the Consultant's work.

| # | Description | Timeline | Expected Results |
|---|-------------|----------|------------------|

| 1 | Needs Assessment Report | Week 1-2 | Comprehensive analysis of IAIS's document management requirements and challenges; clear recommendations for DMS configuration. |
|---|---|---|---|
| 2 | Detailed Implementation Plan | Week 3-4 | A comprehensive plan including timelines, milestones, resource allocation, and risk mitigation strategies. |
| 3 | Functional and Customized Document Management System | Week 5-9 | A fully functional DMS meeting defined specifications, user-friendly interface, secure access controls, and seamless integration with existing systems. |
| 4 | Integrated DMS with Existing Systems (If Applicable) | Week 9-12 | Successful integration of DMS with identified existing systems, ensuring data consistency and workflow efficiency. |
| 5 | Comprehensive Training Curriculum | Week 12-14 | A detailed training plan covering all aspects of the DMS, including learning objectives, training materials, and assessment methods. |
| 6 | Conducted Training Sessions (Minimum 2 Sessions) | Week 15 | Delivery of at least two training sessions with documented attendance, participant feedback, and demonstrated improvement in staff DMS skills. |
| 7 | User Manuals & FAQs | Week - 15 | Clear, accessible user manuals and frequently asked questions addressing system features, troubleshooting, and best practices. |
| 8 | Regular Progress Reports | Bi-Weekly | Bi-Weekly reports documenting progress, milestones achieved, challenges encountered, and planned activities. |
| 9 | Final Project Report | Week -16 | A comprehensive final report summarizing the implementation process, training outcomes, user feedback, and recommendations for future enhancements. |

**PAYMENT SCHEDULE – Letter to WB – Azgarov.**

| № | Deliverable | Payment/% of the total contract amount |
|---|---|---|
| 1 | Upon signing contract | 10% |
| 2 | Needs Assessment Report, Design and Action plan | 20% |
| 3 | Creation of fully functional DMS and its integration into work | 30% |
| 4 | Training is conducted | 20% |
| 5 | Final project report | 20% |

**REPORTING ARRANGEMENTS**

The Consultant shall report to and coordinate activities with the IAIS Project Manager or a designated staff member appointed by the Project Manager. Upon completion of services, the Consultant will submit a comprehensive report and a duly executed Act of Work Performed to the Client.

## QUALIFICATIONS CRITERIA

**Consultant Company shall meet the following minimum qualification requirements:**

| Category | Requirements |
|---|---|
| **Consultant Company** | - **Track Record**: Minimum 3 years in design, development, and deployment of document management systems (DMS) or enterprise content management solutions.<br>- **Project Experience:** Proven experience implementing DMS projects (at least three projects) for organizations of similar scale and complexity, preferably in government, international development, or academic sectors.<br>- **Training:** Experience conducting staff training and capacity building on DMS, including developing user manuals, FAQs, and video tutorials.<br>- **Analytics:** Experience integrating performance analytics dashboards within DMS to monitor usage and effectiveness.<br>- **Digital Transformation:** Capability in supporting digital transformation and paperless office initiatives.<br>- **Support:** Ability to provide ongoing technical support during and after deployment. |

**Key personnel of the company shall meet the following minimum requirements:**

| № | Position | General qualifications (relevant education, training, and experience) | General experience (overall work experience in the sector) | Specific experience (experience in the sector/similar assignments) |
|---|---|---|---|---|
| 1 | **IT/ Document Management Specialist** | • Bachelor's degree in Information Technology, Computer Science, Information Management, Business Administration, or related field.<br><br>• Certified Document Management Professional (CDMP) or similar is preferred.<br><br>• Strong analytical, organizational, and communication skills. | • 3–5 years of experience in document control, records management, or information management.<br><br>•<br><br>• Experience working with enterprise software solutions. | • Hands-on experience configuring and managing Document Management Systems (DMS).<br>• Familiarity with document lifecycle management, metadata, taxonomy, and workflow design.<br>• Experience with compliance requirements (e.g., GDPR, HIPAA, ISO 9001). |

| | | | | |
|---|---|---|---|---|
| 2 | **Project Manager** | • Bachelor's degree in Business, Project Management, Information Technology, or related field. <br> • PMP, PRINCE2, or equivalent project management certification. <br> • Leadership, communication, risk management, and organizational skills. | • 5+ years of project management experience. <br> • Experience managing IT or software implementation projects. | • Managed DMS or enterprise software deployment projects. <br> • Experience with stakeholder management, resource allocation, and budget control. <br> • Track record of delivering projects on time and within scope. |
| 3 | **Trainer** | • Bachelor's degree in Business, Education, Human Resources, Information Systems, or related field. <br> • Training or change management certifications (e.g., Prosci, ATD). <br> • Instructional design, communication, and facilitation. | • 2–3 years in training, change management, or organizational development. <br> • Experience developing and delivering technical training. | • Designed and delivered training for DMS or enterprise software adoption. <br> • Experience managing user adoption and stakeholder engagement for DMS projects. <br> • Developed user manuals, quick reference guides, and online training materials. |

## APPLICATION PROCESS

Interested candidates should submit:

- Company profile (without details about staff)
- Relevant work samples or references
- Proposed methodology and timeline
- Financial proposal

*Applications should be submitted via email for the attention of Mr Shakhboz Akhmedov via the following address: info@iais.uz till **23:59** (Tashkent time) on **September 25, 2025**.*