



Answers to the clarification's questions related to the RfP: Operations Services for EBA Academy

1. Please confirm if we can bid only for the Content and LMS services.

The suppliers must submit a binding proposal in response to the current request for proposals.

Interested bidders are strongly encouraged to prepare offers that covers the full spectrum of services described in the RfP.

As specified in the RfP, the product strategy is an EIT InnoEnergy led activity where the input of the selected service provider will be involved.

2. Do you have a tentative volume, in terms of the number of learning hours of the courses to be developed in mind?
It would be helpful if you can provide the duration for each type of learning:
 - A. Online Learning
 - B. Blended Learning
 - C. Face- to Face- Training

This exercise is demand driven and it's co-developed together w/ our commercial and institutional partners.

The ambition is to triple the current number of learning hours in the coming two years. 90% of content will be on-line learning.

The creation of content will be done on project basis as described in Point 6.4:

6.4. Project Plan Execution and Delivery

EIT InnoEnergy can take the option to outsource the operational content creation tasks (instructional design, graphics design, video recording, text writing, VR AR design, publishing on the website, translation...) to the Partner. This will always be done on project bases.

The Partner will deliver information to EIT InnoEnergy to do the budgeting to create the complete course.

3. What are the targeted devices for online and blended courses?

The content needs to be available on all digital devices including portable devices.

4. Accessibility compliance is gaining popularity and some regions are making it mandatorily legal. Do we need to consider accessibility compliance while the development of these courses?

Not relevant for this RFP. But as we are inviting the possible Partner to describe his way of working, if you have experience with this topic, you are invited to describe all interesting additional future looking features in the proposal.

5. We understand that the courses are offered in all languages of the EU where battery production plants are being deployed. The courses are currently offered in English, French, German and Spanish languages. Do you have a list of specific languages, other than these to be considered for localization for this engagement?

As EBA Academy is a European wide initiative, all European languages are important. The translation service requested will be on project base as described in the RFP under point 11.3. Additional Services "Additional services are one-time projects which can be outsourced to the Partner. Examples of such projects can include: "translation services".

6. Kindly confirm if the enlisted users will access the LMS
 1. Super Admin (EIT InnoEnergy/EBA)
 2. LTP:
 - a. LTP Admin
 - b. LTP Instructors
 - c. LTP learners
 3. Organization Admin and Learners
 4. Individual learner

Confirmed. The LMS system needs to be very flexible (end-users, LTP's, large institutions...) it is not possible to limit the accessibility of the system. We leave it open for the Partner to propose the best system he can propose not limited to any current insights which might limit the scope of the proposal.

7. Learning Delivery process

Which payment gateway would you prefer to be integrated with the LMS?

We welcome the proposals of the selected service provider. The system needs to be very flexible (end-users, LTP's, private organisations, large institutions...). It is for the interested service provider to propose the best system it can propose not limited to any current insights which might limit the scope of the proposal.

8. LMS Tool

What information should be reflected on each user's dashboard?

We welcome the proposals of the selected service provider. All interested service providers are invited to propose the best system it can propose.

9. LMS Tool

Are you also looking for a skill-based training program and assessment for the recommendation engine?

Skill-based training program and assessment for the recommendation engine should at least be one of the functionalities offered. As this system needs to be very flexible (end-users, LTP's, private companies, large institutions...) we do not want to limit the possibilities of the system. We leave it open for the interested service provider to propose additional or other functionalities to come up with the best system he can propose not limited to any current insights which might limit the scope of the proposal.

10. Reporting tool and MIS

Please explain the purpose of money collection, is it related to course purchases, or any other transaction will be done on the platform?

As the course delivery is done through different channels (end-users, LTP's, private companies, large institutions...) money collection of the users of the content will cover the whole set of possible customers. The processes proposed by the Partner needs to be able to cope with these different forms of money collection. The financial management tool for billing and accounting via the LMS system can be one aspect but there are others to be covered. We leave it open for the interested service providers to propose the best system it can propose not limited to any current insights which might limit the scope of the proposal.

11. Customer Acquisition tool

Please explain how the certificate will be generated. Do you need this provision in the LMS or will it be integrated with other systems?

The tasks and roles in this regard are described in the RFP under Point 2. Accreditation, consisting of 2.1 Accreditation Strategy, 2.2. Select Accreditation Body and 2.3. Accreditation Procedure. What is required from the interested service provider is described in this last point:

The partner is responsible to

- * Set up the operational procedures to make accreditation possible*
- * Delivering or at least having access to the data to the Accreditation Body to enable them to assign the certification.*
- * Setting up the operational aspects of delivering certificates to the learners*

As EIT InnoEnergy requires as described under point 2. 1. "The Partner will be involved in this definition as experience with different accreditation strategies is required", we leave it open for the Partner to propose the best system he can propose not limited to any current insights which might limit the scope of the proposal.

12. Customer Acquisition tool

Will the LMS have multiple certificate templates or a single template?

The tasks and roles in this regard are described in the RFP under Point 2. Accreditation, consisting of 2.1 Accreditation Strategy, 2.2. Select Accreditation Body and 2.3. Accreditation Procedure. What is required from the interested service provider is described in this last point:

The partner is responsible to

- * Set up the operational procedures to make accreditation possible*
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- * Setting up the operational aspects of delivering certificates to the learners*

As EIT InnoEnergy requires as described under point 2. 1. "The Partner will be involved in this definition as experience with different accreditation strategies is required", we leave it open for the

Partner to propose the best system he can propose not limited to any current insights which might limit the scope of the proposal.

13. Does the learner need to renew the certificate? If yes, then please explain the workflow for the same.

At this moment, the learner doesn't need to renew the certificate.

14. Customer Acquisition tool

Kindly confirm if all users (organization and LTP) have to register on the platform and purchase the services or courses offered.

As described in the RFP "Instead of describing fixed processes we opted to describe activities or tasks. The option remains open for the interested service providers to propose their own processes to support these tasks".

15. Portals

You have mentioned, "lighthouse customers can have their own portal customized for their use" Please specify who are lighthouse customers and what customization will be required.

Lighthouse customers are customers which are important to EIT InnoEnergy (can be private companies, can be government organizations). Based on the negotiations with the important customers the systems might need to be adapted to their specific needs. It is up to the interested service providers to describe what kind of customization of the system is possible. When customer discussions take place the concrete customization needs will be discussed on specific cases.

16. CRM Tool

We understand that the CRM tool allows the company to store sales opportunities, client information, and user data, and follow the sales funnel.

Please confirm if the same CRM tool will also handle below features mentioned in the RFP

- Helpdesk management (telephone and via mail)
- Event delivery management
- Invitations for the learners
- Hosting management of the events

The interested service providers are invited to propose the way of working in the different processes mentioned in the question. As described in the RFP under the point "EIT InnoEnergy is looking for an international player in the learning and development field to partner up to create a bespoke and scalable a-to-z content creation and distribution service organisation."

17. CRM Tool

For event management, will the learners be able to register only after the invitation or any learner can register for any event?

Probably this will be dependent on the kind of learning (on-line, F2F, labo setting) and the organization organizing the event. It is up to the interested service providers to propose the process which it assumes to be the best in the context set forward in the RFP.

18. Customer Acquisition tool:

Please elaborate on this excerpt "follow up on the learners throughout their whole learning trajectory".

Refer to the answer provided in Question 9/ LMS Tool a skill-based training program and assessment for the recommendation engine should at least be one of the functionalities offered. This means that

for an employee throughout the complete career path from junior to senior executive (or whatever path he or she follows in the company) the knowledge needs should be traceable. Based on those needs the recommendation engine needs to define accompanying courses which need to be offered and followed. There needs to be, linked to that, a way in which the management has a view on the knowledge needs and the ways in which the employee acts in acquiring the knowledge needed for executing the function.

19. The Partner - EIT InnoEnergy Tool Connections. What is the function of the EIT InnoEnergy controller? Please specify what technology is used for the EIT InnoEnergy Tool.

The Content Controller is used for Centralized management and distribution of learning content to learning management systems (LMSs) and other learning applications from the organization who use our content.

Part of the RfP, the interested service provider is invited to propose a way of working which in their experience is the best.

20. The Partner - EIT InnoEnergy Tool Connections

We believe that the EIT InnoEnergy content should be exported to the new LMS, please specify in what formats the content will be exported.

This is not relevant for addressing the RfP. This will be agreed upon with the selected service provider.

21. Please confirm if you need a multilingual LMS platform. If yes, then please provide which languages need to be covered.

EBA Academy is a European wide initiative, all European languages are important. The translation service requested will be on project base as described in the RFP and so will be the languages in which the LMS needs to appear for the users. It will be demand driven, on a one per one basis we will need to discuss this when the requests occur.

22. Since the content is already in four languages (German, English, French, and Spanish), do we need to load the course content in the language learner has selected?

Yes. The content will be uploaded upon agreement with the customers, being LTP's, private organizations.

23. Is there any technology preference for LMS?

No. It is open to the interested service provider to propose the way of working which in their experience is the best.

24. Please confirm the total number of learners

EIT InnoEnergy has been assigned by the European Commission to play a central role in the offering a learning service in the growing European Battery Value chain to make upskilling and reskilling a reality. The European Commission estimation have shown there is a need to upskilling and reskilling up to 800.000 employees in the European Union in the next coming 5 years. EBA Academy is setting up the organization to be able to fulfil that role.

25. Course delivery via LTPs LMS:

Will Integration with third-party LTP be required? Or will the LTP user have admin rights on partner LMS? Will the LTP user need an SSO login?

The way in which the third-party LMS systems will be linked are not defined yet, this is for discussion. The interested service providers are invited to propose the way of working which in their experience is the best. It is critical to have the necessary flexibility to work in different scenarios with different LTP's.

Set 1

Generic

26. The following capability categories are not elaborated upon in the detailed section of the RFP. Would you like for us to provide an overview of our capabilities in these areas, or should we take these categories to be vestigial from a previous draft of the RFP?

10 Provide & Manage Facilities
12 Logistics – Event Management (F2F course delivery)
13 Instructors Management
14 Delivery Partner Assignment & Contractor Management
15 Reporting / MIS
16 Billing & Money Collections

The interested service providers are invited to provide sufficient insights and references in relation to their capacities in provision and management of facilities, logistics – event management, instructors management, delivery partner assignment and contractor management, reporting, billing, and money collection.

All these activities are to be executed by the contracted service provider.

This is explicitly mentioned in the RFP under the heading: 8. **Training Delivery (including facilities and instructors)**. In the part “activity of the partner”.

Sections 3. 4 and 5 (Sales and Marketing)

27. Is EIT InnoEnergy utilizing only the HubSpot CRM for sales or are your teams also utilising HubSpot Marketing Hub which is the marketing automation platform offered by HubSpot?

We deem that this question is not relevant for the scope of the RfP. In the introductory part of the description of the Scope of work, it is explicitly mentioned: “Instead of describing fixed processes we opted to describe activities or tasks. This leaves the option open for the service provider to propose their own processes to support these tasks.” This means the service provider can propose the systems which according to them is the most suited for the job however these will need to be fully aligned with EIT InnoEnergy systems and practice.

In this respect Hubspot, is the tool used for both marketing and sales pipelines. The tool is customized for EIT InnoEnergy purposes, specific rules were defined to protect it and keep it up to date.

28. Is brand enhancement in scope or does the EIT InnoEnergy team already have a well-defined brand strategy and guidelines?

The EIT InnoEnergy marketing department is responsible for the branding of EIT InnoEnergy and has defined a robust brand strategy and guidelines. These guidelines will be shared with the successful service provider.

29. Is the 2020 press kit on your website the most current version of your media kit?

Correct. The information available on the <https://www.innoenergy.com/> and <https://www.eba250.com/about-eba250/> websites is completely up to date.

30. Could you describe the format of your current marketing and sales collateral/product documentation? Do you utilise a mix of video, podcasts, digital PDFs, infographics, and print collateral?

EIT InnoEnergy uses in the marketing mix all the above.

31. Will digital omnichannel advertising (examples – paid media such as the Google Display network, Meta Advertising suite, Taboola etc.) be an integral part of the marketing strategy and mix along with social media?

Omnichannel is a core part of what we do well. We do expect the interested service providers to propose additional options.

32. Does EIT InnoEnergy currently utilise any form of GDPR compliant email marketing such as opt-in newsletters?

There are GDPR compliance clauses in our emails and other CRM-related activities. The legal aspects of GDPR are managed by the legal team. Additional information will be shared with the selected service provider. There are also very strict policies and guidelines on the use of data from/via HubSpot.

33. Will the scope of marketing be limited to the EU region or would you be targeting international students outside the EU for your Masters programmes?

Global campaigns with emphasis on certain continents – India, West Africa, South America, Europe, China.

34. How are you currently tracking the effectiveness of your marketing initiatives?

There is marketing impact KPIs in place to assess each initiative. These will be discussed and refined with the support of the selected service provider.

Section 7 (Channel Partner Organisation and Management)

35. Could you please help us understand:

- Your EBA organisation structure?

EIT InnoEnergy and the EBA Academy organization is currently building the LTP network and we're looking for a service provider to support us with the adequate tools and processes to managing such a network. Currently there are about 20 channel partners, and the objective is to double this number in the coming year. We're looking together with the selected service provider to define criteria, processes, and tools to select and manage their performance. We encourage the interested parties to propose solutions

for the workforce, processes and procedures to support EBA Academy with the management of the existent and future local partners' network.

The answers beneath give an indication about the current way of working and one of the objectives of this RfP is to provide us with options, processes, tools and solutions that will improve the overall operations of the EBA Academy.

The current EBA Academy organizational structure will be shared with the selected service provider. There is no function within the current organizational set up responsible for the local partners management.

- Your customer reach, by sharing a list of customers you work with:
 - Via EBA direct contacts
 - Via LTPs

These are the two channels through which we access customers. The exhaustive list will be shared once the contractual procedures are completed and all the legal and GDPR procedures from the specific contract with these customers are considered.

- Your criteria for identification and selection of an LTP?

No formal selection procedure available at this moment.

- Profile of your LTPs, by sharing a list of the current LTPs that are already working with EBA?

The list of our local partners will be shared with the selected service provider, upon the written consent of all the partners.

The local training providers profile differ per geography, size, market segment and delivery approach.

- Your contracting model with LTP, the commercial terms and conditions with the current LTPs? Example: revenue share model, sales target, delivery target setting, etc.,

The most used is a licensing model.

- Your contracting model with facility owners, the commercial terms and conditions with facility owners? Example: per day / per learner rate

There are no specific contracts defined on the facility aspects of the course delivery. For the laboratory facilities we have the option to use those facilities, but the contracts are created on project basis.

- Your contracting model with logistics organisations, the commercial terms & conditions with logistics organisations?

For now, there are no specific contracts with logistics organizations.

- Your contracting model with instructors, the commercial terms & conditions with logistics instructors? Are they different from LTP contracts?

The local partners use their own instructors

- What is working well and areas of improvement in the model that you have setup with current LTPs?

There is a clear need to set up as fast as possible a clear management structure (setting up targets, following up targets, setting up performance measures, quality control) to ensure that this network delivers at its full potential and a much higher number of learners is exposed to the EBA Academy content.

- Your commercial model with customer organisations? How do you envisage the partner playing a role in billing and money collection with customer organisations?

EIT InnoEnergy would like to leverage the experience of the selected service provider with these two processes. The idea is that we go together to the customer organization and act as the EBA Academy. The Partner can propose here his way of working. This leaves the option open for the selected service provider to propose their own processes to support these tasks." This means the service provider can propose the processes and systems which according to them is the most suited for these tasks. All processes and systems will be needed to aligned with EIT InnoEnergy processes and systems.

- Your commercial model with individual learners? How do you envisage the partner playing a role in billing and money collection with individuals?

In the current model individual learners go through the local training providers. This model will be preserved in the future.

THE END
