



# Request for proposals

## Operational services for EBA Academy

### by EIT InnoEnergy

Company KIC InnoEnergy SE

Registered Office Kennispoort 6th floor · John F. Kennedylaan 2 · 5612 AB Eindhoven · The Netherlands

Phone +31 (0) 40 240 60 31 · email [info@innoenergy.com](mailto:info@innoenergy.com) · VAT-ID 8500.04.287.B.01 · Bank ABN Amro Bank

Account number 46.58.19.958 · IBAN NL44ABNA0465819958 · SWIFT ABNANL2A

EIT InnoEnergy is the trading brand of KIC InnoEnergy SE

## 1. Table of contents

1.	Table of contents	2
2.	Overview of EIT EIT InnoEnergy	3
3.	Scope of work	3
4.	Proposal Process	24
4.1.	<i>Participation</i>	24
4.2.	<i>Submission of proposal</i>	24
4.3.	<i>Validity of the proposals</i>	25
4.4.	<i>Requests for additional information or clarification</i>	25
4.5.	<i>Costs for preparing proposals</i>	25
4.6.	<i>Ownership of the proposals</i>	25
4.7.	<i>Clarification related to the submitted proposals</i>	26
4.8.	<i>Negotiation about the submitted proposal</i>	26
4.9.	<i>Evaluation of proposals</i>	26
4.10.	<i>Signature of contract(s)</i>	27
4.11.	<i>Cancellation of the proposal procedure</i>	27
4.12.	<i>Appeals/complaints</i>	27
4.13.	<i>Ethics clauses / Corruptive practices</i>	27
4.14.	<i>Annexes</i>	28

## 2. Overview of EIT InnoEnergy

EIT InnoEnergy is a European company fostering the integration of education, technology, business and entrepreneurship and strengthening the culture of innovation. The challenge is big, but our goal is simple: to achieve a sustainable energy future for Europe. Innovation is the solution. New ideas, products and services that make a real difference, new businesses and new people to deliver them to market. At EIT InnoEnergy we support and invest in innovation at every stage of the journey – from classroom to end-customer. With our network of partners we build connections across Europe, bringing together inventors and industry, graduates and employers, researchers and entrepreneurs, businesses and markets.

We work in three essential areas of the innovation mix:

- Education to help create an informed and ambitious workforce that understands the demands of sustainability and the needs of industry.
- Innovation Projects to bring together ideas, inventors and industry to create commercially attractive technologies that deliver real results to customers.
- Business Creation Services to support entrepreneurs and start-ups who are expanding Europe's energy ecosystem with their innovative offerings.

Bringing these disciplines together maximises the impact of each, accelerates the development of market-ready solutions, and creates a fertile environment in which we can sell the innovative results of our work.

For more information about our company please visit the following website:

[http://www.EIT\\_InnoEnergy.com/about-EIT\\_InnoEnergy/](http://www.EIT_InnoEnergy.com/about-EIT_InnoEnergy/)

## 3. Scope of work

**The European Battery Alliance (EBA) Academy** is a newly founded public-private education business line to support the transformation of the European industry towards an electrified and green future, funded by the EU. The EBA Academy will provide training and skills solutions for the whole battery value chain as new and strong strategic industrial pillar erecting across Europe. The goal is to set up and run a pan-European training and skills platform – with a strong focus on distance learning tools and E-Learning – embedded in the European Battery Alliance network and all its industry partners.

EBA Academy has an existing portfolio of battery training programmes, mostly online but also blended courses. Most of these programmes have been designed for higher education levels and engineering target audiences. The programmes cover topics on the entire battery value chain, from raw materials for battery production, to battery and electricity basics, from battery technologies and battery system components to different battery-based applications such as mobility, grid support and electrification of industry, from technological innovations to new business models supporting the energy transition.

EIT InnoEnergy wants to focus on the strategic elements in the development of the portfolio. This means focus on high level product and portfolio development, relationship building with the European institutions, accreditation policies and sales and marketing strategies.

EIT InnoEnergy licenses its' portfolio of around 30 online and blended professional learning courses directly to key customers or to local content providers. This means that within this EBA Academy Business Model there are two delivery tracks we want to cover. One is the direct industry contacts where we want to deliver the content eventually combined with services for the a to z management of the Learning and Development Process. On the other hand we collaborate with Local Training Providers (LTPs) who will execute and deliver the trainings available in the EBA Academy portfolio to their customers throughout Europe and beyond. Also here we want to offer the content eventually combined with the service that we organise the complete course delivery and learner follow up. If the LTP is capable of doing so we also want to keep the option open that the training delivery and learner management is done by the LTPs via their delivery system. In order to realize these different operational options we need to have a flexible solution linking our systems with the LTP delivery systems.

Courses of EBA Academy are updated on a yearly basis, and are progressively translated and offered in all languages of the EU where battery production plants are being deployed. So far, English, French, German and Spanish language are supported.

Also new courses are continuously developed in close collaboration with all stakeholders.

#### **Framing the collaboration EIT InnoEnergy is looking for in this RFP**

We are 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. Therefor we look for one partner who has proven track record in the complete and end-to-end Learning and Development Process management and delivery for large multinational organisations (multi lingual, several 100.000 of employees to be trained in various courses). The service to be provided consist of: learning development (e-learning, blended learning, F2F learning...), large scale learning delivery platform implementation (including learner management...), managing learning delivery organizations, quality assurance on large scale course delivery, content management services including multiple language content localization and versioning, experience with different accreditation schemes and overall L&D process implementation services.

We are looking for a partner who can deliver a professional service, delivering perfect quality, and who can help us to shorten delivery deadlines for courses to our customers.

To frame the descriptions beneath, EIT InnoEnergy wants to engage in this partnership in such a way that a lean EIT InnoEnergy organization takes the lead in strategy development and the partner takes the lead in the operational execution. EIT InnoEnergy is looking for a partnership on the long term to develop together a European wide content creation and delivery service. In a first step the focus is on the current existing battery content but it will be expanded in the coming years to cover the complete sustainable energy area.

Below we will detail the services requested. A submission of a proposal can only be done for the complete package of services requested. EIT InnoEnergy is not looking for individual suppliers who could deliver only part of the service requested.

With the description of what EIT InnoEnergy is looking for in the partnership it was decided to describe the main roles of the two players in the partnership: the tasks in which EIT InnoEnergy will take the lead and the tasks in which the Partner will take the lead.

This of course means that EIT InnoEnergy is looking to outsource a number of operational processes to a Partner. Instead of describing fixed processes we opted to describe activities or tasks. This leaves the option open for the Partner to propose their own processes to support these tasks.

The description of the requested services is based on the division of which organization is taking the lead in a certain activity. Following table summarizes this division.

	Activity	EIT InnoEnergy Accountability	Partner Accountability
1	Product Management	✓	
2	Certification (accreditation)	✓	
3	Sales & Market strategy (including policies)	✓	✓
4	EIT InnoEnergy Brand Awareness Marketing	✓	
5	Sales & Marketing	✓	✓
6	Content Design & Development	✓	✓
7	Channel Partner Organization and Management		✓
8	Training Delivery (Including Instructors)		✓
9	Course Delivery Execution and Management (including Quality Assurance)		✓
10	Provide & Manage Facilities		✓
11	Logistics Support (all IT systems – internal and external)		✓
12	Logistics – Event Management (F2F course delivery)		✓
13	Instructors Management		✓
14	Delivery Partner Assignment & Contractor Management		✓
15	Reporting / MIS		✓
16	Billing & Money Collections		✓

## EIT InnoEnergy will take the lead in:

### 1. Product Management

#### 1.1 Product Strategy development

##### 1.1.1 Product concept & value proposition

Activity EIT InnoEnergy	<p>Based on the business mission and vision EIT InnoEnergy will define the value proposition the company wants to offer to their clients.</p> <p>The EIT InnoEnergy content product is an 'extended product concept' consisting of a product component (content), a service component (content delivery, learner follow up) and an accreditation component.</p>
-------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>The Accreditation Strategy (own certification, country based, other accreditation bodies) will be made explicit in the Product Strategy Plan.</p> <p>Based on this definition EIT InnoEnergy will describe the product, service portfolio and the accreditation aspects which will bring this value to the target customers.</p> <p>(Remark: the documents mentioned in “Output” will be shared between EIT InnoEnergy and the Partner)</p>
Output:	Product Strategy Plan
Activity of the Partner	<p>The Partner will be closely involved in this process by, but not limited to,</p> <ul style="list-style-type: none"> <li>* giving input from their operational point of view</li> <li>* feedback from their experience in the market</li> </ul>

### 1.1.2 Product roadmap

Activity EIT InnoEnergy	<p>EIT InnoEnergy will define the Product Roadmap which consists of a long term view (first year per quarter, later half yearly up to 3 years) of the content and features of the different products to be developed.</p> <p>This will also define the different steps in the product life cycle from introduction to maturity (with maintenance and revision) up to the fading out of a product. Looking at the fast evolution of the technology development and the economic environment (important for the up to datedness’ of business cases and imagery) the complete product life cycle could cover 5 years. This defines the horizon which needs to be taken into account for the future developments. The Product Roadmap will thus envision the evolution of several product lines created.</p> <p>The product roadmap is used to detect combinations of products, overlaps, holes in the total product offer.</p>
Output	Product Roadmap
Activity of the Partner	<p>The partner will be involved in this process by, but not limited to,</p> <ul style="list-style-type: none"> <li>* giving input from their operational point of view</li> <li>* feedback from their experience in the market</li> </ul>

### 1.2 Product definition

Activity EIT InnoEnergy	<p>EIT InnoEnergy will create the high level definition of the courses based on the market requirements and customer needs gathered. This will include at least:</p> <ol style="list-style-type: none"> <li>1. The product             <ul style="list-style-type: none"> <li>* the content topic of the courses (level of the course, course structure, topic specialists to be involved)</li> <li>* the format of the delivery of the course (duration, F2F or on-line, modules of the course)</li> <li>* the target audience (what markets are envisioned )</li> <li>* the target number of learners (sold via the different sales channels)</li> <li>* timing of the realization of the product (based on the rough production data)</li> <li>* the product evolution over the product life cycle (building new modules to be added, maintenance of the courses...)</li> </ul> </li> <li>2. Price             <ul style="list-style-type: none"> <li>* define the proposed pricing structure for the different distribution channels</li> </ul> </li> <li>3. Place</li> </ol>
-------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<ul style="list-style-type: none"> <li>* how will the target audience be reached,</li> <li>* where the main sales focus will be: on direct sales or sales via LTP's</li> <li>* how the delivery will be done either directly and/or via the LTP's.</li> </ul> <p>4. Promotion</p> <ul style="list-style-type: none"> <li>* what promotion will be needed and what budget</li> </ul> <p>5. Accreditation</p> <ul style="list-style-type: none"> <li>* what kind of accreditation will be delivered with the course</li> </ul>
Output	EIT InnoEnergy's Product Plan
Activity of the Partner	<p>The Partner will be very deeply involved in this product definition from the start onwards as they can advise on several aspects and will need to give direct input on several topics such as, but not limited to:</p> <ul style="list-style-type: none"> <li>* give market and customer feedback</li> <li>* advise on the learning methodologies to be used</li> <li>* advise on the production cost</li> <li>* advise on the target number of learners</li> <li>* advise on the distribution channels to be used</li> </ul>

### 1.3. Business Plan

Activity EIT InnoEnergy	<p>Based on this input a high level cost and income calculation will be made per course in order to evaluate the profitability of the project. This will be consolidated in an overall business plan for the complete course portfolio. This will include a product plan for the next 3-5 years and the investment and revenue plans.</p> <p>The resulting overall plan will include at least :</p> <ul style="list-style-type: none"> <li>* overall product plan</li> <li>* scope and high level content of the individual courses</li> <li>* investment plan</li> <li>* planned revenues: pricing structure and number of learners envisioned</li> <li>* KPI's to follow up the product creation and performance</li> <li>* quality assurance plans</li> <li>* customer feedback cycles"</li> </ul>
Output	EIT InnoEnergy Business Plan
Activity of the Partner	<p>This plan will be created in close collaboration with the Partner and intensively discussed. The Partnership needs to be understood as the common intension to go to the market with the content portfolio in order to make money. In this way the Business Plan will be a joined plan of action.</p>

## 2. Accreditation

### 2.1. Accreditation Strategy

Activity EIT InnoEnergy	<p>EIT InnoEnergy (and/or his/her Accreditation Manager) will develop the accreditation view for the learners of the EIT InnoEnergy courses and how it will add value for the learners following the courses, based on the concepts developed in the Product Strategy Plan.</p> <p>A specific road which will be investigated is if "EIT InnoEnergy" can become the name under which the courses can be accredited. EIT InnoEnergy has extensive experience in university level accreditation schemes and will use this to extend accreditation schemes to professional learning.</p>
-------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Output	EIT InnoEnergy Accreditation Strategy
Activity of the Partner	The Partner will be involved in this definition as experience with different accreditation strategies is required.

## 2.2. Select Accreditation Body

Activity EIT InnoEnergy	Based on the strategy chosen one or several accreditation bodies will be selected
Output	Selected Accreditation Body or Framework
Activity of the Partner	The Partner will be involved in this definition as they have experience with different accreditation strategies. The Partner will be closely involved in this discussion as the framework for the accreditation and the learners who succeed will be operationally followed up by the Partner systems.

## 2.3. Accreditation Procedure

Activity EIT InnoEnergy	EIT InnoEnergy is responsible for the delivery of the accreditation to the learners but can outsource the operational aspects to the Partner.  EIT InnoEnergy will set up the procedure to assign the certifications involving the Accreditation Body and the partner.
Output	Accreditation Certificates processes and procedures
Activity of the Partner	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

## 3. Sales & Market Strategy and Policies

EIT InnoEnergy is looking for a stepwise approach in setting up the sales partnership: Starting immediately the sales partnership will be a 'loose partnership'. Meaning the Partner and EIT InnoEnergy will keep their own sales channels. An option here is that the Partner starts with an International LTP contract with EIT InnoEnergy.

When a revenue of 1 million euro is reached, EIT InnoEnergy wants to review with the Partner the collaboration and go to a more structured way of collaboration. The aim here is that the sales organisations of the Partner and EIT InnoEnergy start to collaborate very closely and eventually form a new legal structure.

### 3.1 Sales & Marketing Strategy

Activity EIT InnoEnergy	EIT InnoEnergy will define the Sales & Marketing Strategy based on the Product Plans on one side and the Market Intelligence on the other side. For the Market Intelligence EIT InnoEnergy can use the internal knowledge, and can also assign external parties to deliver data.  Based on these data EIT InnoEnergy will define the * primary & secondary markets with target audience * product/market fit
-------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



	<ul style="list-style-type: none"> <li>* go-to-market plan: define per market segment and the ways in which these markets are to be entered and accessed.</li> <li>* decide on the markets and key accounts to be approached by our sales team via direct sales</li> <li>* decide on the markets and target public to be approached via the LTP channels and define the requirements for an LTP to be accepted as sales channel for EIT InnoEnergy</li> <li>* sales strategy (direct and indirect sales) and the sales channels definition: define how to capture the market in a direct way, via sales channels (LTP's), via government, sector organizations</li> <li>* the marketing plan (collateral, social media ...) to support the sales people and sales channels</li> <li>* definition of the marketing policies to be used by the sales channels (LTP's )</li> </ul> <p>Based on the above a complete Sales Plan will be made including</p> <ul style="list-style-type: none"> <li>* the needed sales force to execute the plans</li> <li>* the investments needed in channel development, local presence</li> <li>* KPI's to measure the sales performance</li> </ul>
Output	Sales & Marketing Strategy Document
Activity of the Partner	<p>The partner will be deeply involved in this process by, but not limited to,</p> <ul style="list-style-type: none"> <li>* being the source for the market intelligence</li> <li>* in setting up together the Sales &amp; Marketing Strategy Plan</li> <li>* planning the execution of the plan</li> <li>* setting up common go-to-market strategies</li> </ul>

### 3.2 Pricing strategy

Activity EIT InnoEnergy	<p>EIT InnoEnergy is will define the Pricing Strategy over the complete product portfolio (content, services, accreditation)</p> <p>This strategy includes:</p> <ul style="list-style-type: none"> <li>* the overall pricing strategy and evolution over the product portfolio</li> <li>* the models used: licensing, one off prizes, recurring business, volume discounts,</li> <li>* the pricing evolution over the complete product life cycle</li> <li>* pricing which will be taken into account for specific consulting or projects</li> <li>* pricing strategy variations to take into account the differences in the geographical areas (EUR, US, Asia) and countries.</li> </ul>
Output	Pricing Strategy Document
Activity of the Partner	The Partner will be closely involved setting up the Pricing Strategy.

### 4. Brand Awareness Marketing

Activity EIT InnoEnergy	<p>EIT InnoEnergy is accountable for the overall EIT InnoEnergy and EBA Academy brand marketing. Also the positioning of the product needs to be defined by EIT InnoEnergy.</p> <p>The marketing &amp; sales collaterals will be created in line with the EIT InnoEnergy branding guides.</p>
-------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	EBA250 ecosystem access is also an important element of this aspect. EIT InnoEnergy will create a complete Marketing Communications Plan.
Output	Marketing Communications plan
Activity of the Partner	The involvement of the Partner in this topic will also be very relevant. The creation of the product documentation in detailed segments can be outsourced to the Partner or to LTP's if relevant.  Also the Partner needs to adhere to the guiding EIT branding rules.

## 5. Sales & Marketing

See remark on the stepwise evolution of the joint sales efforts mentioned in Point 3. The description below needs to be interpreted in that framework.

### 5.1. Sales and Marketing asset inventory

Activity EIT InnoEnergy	EIT InnoEnergy and the Partner to set up a combined sales organization taking into account <ul style="list-style-type: none"> <li>* EIT InnoEnergy being the recognized innovation leader for the energy transition</li> <li>* the EIT InnoEnergy brand</li> <li>* support &amp; backing of EU including EU funding access</li> <li>* industry value chain approach</li> <li>* large international subject matter expert network</li> <li>* initial qualified existing LTP network in EU</li> <li>* ecosystem access: EBA250</li> <li>* training labs access</li> </ul>
Output	Sales and Marketing Asset Inventory Description
Activity of the Partner	The Partner to set up sales organization with EIT InnoEnergy <ul style="list-style-type: none"> <li>* the Partner to bring extensive Learning &amp; Development experience;</li> <li>* industry reputation</li> <li>* learning and Development network and ecosystem</li> <li>* the Partner global customer base</li> <li>* global LTP Network</li> <li>* the Partner to bring its own learning portfolio</li> <li>* portfolio of services for customers</li> </ul>

### 5.2 Marketing Organization

Activity EIT InnoEnergy	EIT InnoEnergy Central Marketing function will be execute in the Partnership: <ul style="list-style-type: none"> <li>* the day to day EIT InnoEnergy brand and product marketing communication</li> <li>* creation of the own/ common sales collaterals</li> <li>* create a 'Company' website (= website of the 'common' sales organisation)</li> <li>* be part of interesting networking events and conferences</li> </ul> <p>The Partners will agree in a common agreed upon document how the collaboration on marketing aspects will work.</p>
Output	Marketing Collaboration Description
Activity of the Partner	Partner Marketing function will execute in the Partnership: <ul style="list-style-type: none"> <li>* do the day to day marketing communication</li> <li>* creation of the own sales collaterals for specific markets</li> </ul>

	* instruct the marketing and communications of the LTP's
--	----------------------------------------------------------

### 5.3. Sales Organization

Activity EIT InnoEnergy	<p>The Partner and EIT InnoEnergy will create the sales organization of the Partnership (see remark under point 3):</p> <ul style="list-style-type: none"> <li>* country dependent sales functions</li> <li>* sales per geographical area</li> <li>* the current contacts and contract will be handled in common agreement</li> </ul> <p>Set up of the tools to support sales (currently EIT InnoEnergy uses Hubspot) :</p> <ul style="list-style-type: none"> <li>* CRM tool to support the sales funnel management</li> <li>* tool to collect market intelligence from the sales people</li> <li>* adequate sales reporting tools</li> </ul> <p>The Partners will agree in a common agreed upon document how the collaboration on sales aspects will work.</p>
Output	Sales Collaboration Description
Activity of the Partner	The Partner and EIT InnoEnergy will agree on which tools to use in the partnership sales organization.

## 6. Content Design & Development

### 6.1 Project management

Activity EIT InnoEnergy	<p>The course production process used by EIT InnoEnergy consists out of 6 steps:</p> <ol style="list-style-type: none"> <li>(1) project proposal (including high level design),</li> <li>(2) detailed project design,</li> <li>(3) course development and production, test of one module,</li> <li>(4) full project execution,</li> <li>(5) pilot course and</li> <li>(6) final release.</li> </ol> <p>The detailed description will be shared with the Partner.</p> <p>EIT InnoEnergy will take the lead for the complete project creation, realization and delivery until the final sign of.</p> <p>EIT InnoEnergy has developed a 6 step stage gated project process to develop and implement courses based on a lean mode of operations. The steps mentioned in this description are part of that process. The idea is that on each stage gate a formal evaluation of the project status is made and it is decided if the project can be continued, work needs to be redone or eventually the project needs to be stopped (and eventually redesigned).</p> <p>The different steps for a complete course production are described beneath. On specific project situations (e.g. creating micro courses, AR-VR projects...) EIT InnoEnergy together with the partner can decide to use other project methodologies which are more suited for the task at hand.</p>
-------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	EIT InnoEnergy will define the Design Standards for the courses to be created. This will define the unique look and feel of the EIT InnoEnergy courses to be applied all over the course portfolio.
Output	Project Management Methodology EIT InnoEnergy Course Design Standards
Activity of the Partner	Most likely the Partner has developed their own project methodology. As part of the partnership we can review both methodologies to come to a common best in class project methodology. The Partner will deliver the necessary input to enable InnoEnergy to create the Project Plan and do the review on the project steps. The Partner will use the EIT InnoEnergy Course Design standards.

## 6.2 Project proposal

Activity EIT InnoEnergy	EIT InnoEnergy is accountable to create the  Step 1: Project Proposal (including high level design)  This consists of: * needs analysis, * business opportunity, * target group profiles, * define the high-level course design * general product design with products/service descriptions * create the overall project business case: cost details
Output	Project Plan and High Level Course Design
Activity of the Partner	The Partner will help in these tasks giving the necessary input for the creation of a Project Proposal and business case.

## 6.3 Detailed project plan

Activity EIT InnoEnergy	EIT InnoEnergy is accountable to create:  Step 2: Detailed Project Design:  This will consist of * detailed project plan, including the creation of texts, media, pilot testing and final delivery * detailed description of learning solution: F2F, e-learning, blended * the instructional design * the content definition * assignment of the subject matter experts to provide materials * accreditation linked to the course designed * quality assurance plan: for the content, course design, learning outcome * risk assessment: which are the risks in the project and how are they dealt with * resource allocation: are the necessary resources available on the level of (specialised) people, equipment, facilities, software...
Output	Detailed Project Plan Subject Matter Expert Contract

Activity of the Partner	The Partner will help in these tasks with the relevant topic matter experts such as instructional designers, video specialist, text writer/editor, VR AR designers to come to a good Detailed Project Design.
-------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

#### 6.4. Project Plan Execution and Delivery

Activity EIT InnoEnergy	<p>In the next steps EIT InnoEnergy stays accountable for the realization of the project. EIT InnoEnergy keeps the right to decide by whom and how the content creation will be done.</p> <p>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.</p> <p>The Partner will deliver information to EIT InnoEnergy to do the budgeting to create the complete course.</p> <p>Once the project definition and budgeting is agreed upon the Partner can start the execution.</p> <p>Regular project follow-up meetings between EIT InnoEnergy and the Partner will ensure the project is executed as defined, in scope, in budget, in time and with the quality required.</p>
Output	Detailed Project Plan Status and Follow Up documents
Activity of the Partner	<p>The Partner is responsible for executing following activities.</p> <p>The next steps include the execution of the content creating process with stage gate based decision steps. This execution and implementation will be done by the Partner but with EIT InnoEnergy keeping the overall project management role.</p> <p>This means the Partner will execute:</p> <p>Step 3: Develop and test one module:</p> <ul style="list-style-type: none"> <li>* setting up the necessary internal project management structure</li> <li>* developing the content with the subject matter expert(s) including: content writing, content curating, scripts storyboard design, media production development, publishing in the platform, organize evaluation.</li> <li>* quality assurance and release engineering for publishing in the platform</li> <li>* one module is produced and tested on a limited learner group leading to the finetuning of the course.</li> </ul> <p>When the first module is accepted by EIT InnoEnergy and the Partner, the project can go to Step 4.</p> <p>Step 4: Full Project Execution: all modules of the courses are created as planned This is the extension of Step 3. It is possible to have regular feedback loops each time testing a module when it is finalised. This will ensure the module delivered will stay within the scope as defined in the project plan and will be accepted by the user public. Once the different modules are finalised the complete course is brought together.</p> <p>The complete course is created and published in the platform. The course is in such a stage of finalisation that it can be used on a test public.</p>

	<p>When the course is finalised and accepted by EIT InnoEnergy and the Partner, the project can go to Step 5.</p> <p>Step 5: Pilot Course: organize a pilot delivery to collect learner feedback The Pilot Course is the first complete course delivery to a public. This includes all the aspects which needs to be tested before final delivery can be realised: the content delivery, course materials, questions during the course, questionnaire for accreditation, payment and money collection...</p> <p>When the Pilot Course generates the proposed results which are accepted by EIT InnoEnergy and the Partner, the project can go to Step 6.</p> <p>Step 6: Final Release: course is published in the learning system, made available for the customers.</p>
--	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### 6.5. Project Finalization

Activity EIT InnoEnergy	<p>EIT InnoEnergy will close the project with a final report on the cost of the project and the lessons learned. The course will be included in the portfolio. The course will be handed over to the Partner who is than accountable for delivering the course to the learners</p>
Output	Project Acceptance Document and lessons learned
Activity of the Partner	<p>The Partner will take part in the closing of the project with all input needed to finalise the project. The Partner gets the course handed over from the Project Manager and is from that moment onwards accountable for the delivery of the course to the learners via all distribution channels available.</p>

### The Partner will take the lead in:

### 7. Channel Partner (Local Training Providers) Organization and Management

Activity EIT InnoEnergy	<p>Local Training Providers are considered as an important sales channel. The delivery of courses will be done through the LTP's.</p> <p>The network of LTP's will require business operational management. EIT InnoEnergy will outsource these functions to the Partner.</p> <p>EIT InnoEnergy will keep the current LTP's as contacts but transfer the business and operational execution for course delivery, management, learner administration ... to the Partner. In collaboration between EIT InnoEnergy, the LTP and the Partner individual project plans will be set up to organize the transfer of the LTP's to the Partner.</p> <p>EIT InnoEnergy will also support the Partner in finding new LTP's</p>
Output	<p>Channel Partner Strategy Document Regular Reporting on the Channel management, to be defined between EIT InnoEnergy and the Partner</p>

<p>Activity of the Partner</p>	<p>The Partner is accountable for setting up, managing and operationalizing the complete LTP Partner network organisation . The priorities in setting up the LTP network will be commonly agreed upon with EIT InnoEnergy.</p> <p>The Partner has the processes to manage these tasks. The Partner will create and present a framework for the channel management consisting of (but not limited to) the steps mentioned here:</p> <ol style="list-style-type: none"> <li>1. Identification of an LTP: validate if current LTP's which are in the Partner ecosystem are the best match, otherwise do a search and evaluate the future LTP's.</li> <li>2. Quality check: vendor assurance, industry certification, financial health</li> <li>3. Contracting: NDA, contract, GDPR related clauses</li> <li>4. Engagement and governance of LTP: onboarding of the LTP, follow up the LTP including relationship management, performance follow up, quality follow up, strategic partner review. The Partner uses IT tools to follow up and manage the LTP relationship with operational dashboards.</li> <li>5. Trouble shooting: an escalation procedure needs to be in place to handle unforeseen circumstances which might occur to the channel partners or the management. This procedure can be</li> </ol> <p>On a quarterly basis EIT InnoEnergy and the Partner will do LTP reviews to commonly evaluate the performance of each individual LTP. Based on the performance it is EIT InnoEnergy which keeps the right to decide on the continuation or discontinuation of the relationship with the LTP.</p> <p>LTP Partner management will be considered successful if the LTP's will meet the joined agreed upon KPI's with EIT InnoEnergy such as target revenue, number of learners, number of courses delivered etc.</p>
--------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### 8. Training Delivery (including facilities and instructors)

<p>Activity EIT InnoEnergy</p>	<p>EIT InnoEnergy outsources the complete Training Delivery Service to the Partner.</p> <p>EIT InnoEnergy will support the Partner in finding the right locations for</p> <ul style="list-style-type: none"> <li>* laboratory infrastructure to be used for the practical workshops</li> <li>* locations at the LTP sites</li> <li>* locations in the customer facilities</li> </ul>
<p>Output</p>	<p>Regular Reporting on the Training Delivery, to be defined between EIT InnoEnergy and the Partner</p>
<p>Activity of the Partner</p>	<p>The Partner is accountable to organize the training delivery including facility management, logistic services and setting up the instructors organisation.</p> <p>The Partner has the processes to manage this task. The Partner will create and present a framework for the Training Delivery consisting of (but not limited to) the points mentioned here:</p> <ol style="list-style-type: none"> <li>1. Facility Management</li> </ol>

	<ul style="list-style-type: none"> <li>* selecting appropriate facilities to organise the F2F part of the courses. This can be inside the customer organisation facilities or in an LTP</li> <li>* selecting the appropriate laboratory facilities to organise the workshops</li> </ul> <p>2. Event Management</p> <ul style="list-style-type: none"> <li>* organize all the logistics setting up the course in the facility</li> <li>* inviting the learners, registration and complete administrative follow-up</li> </ul> <p>3. Instructor management</p> <ul style="list-style-type: none"> <li>* selecting the instructors</li> <li>* training the instructors: the high quality of the trainers should be assured by for example requiring they successfully execute the train-the-trainer course with an over overall satisfactory score.</li> <li>* inviting the trainers to the events and managing the financial aspects</li> <li>* ensuring the quality of delivery</li> <li>* building up and managing the instructor network (e.g. by setting up an instructor database, organising evaluations, performance reviews)</li> </ul> <p>4. Contract Management</p> <ul style="list-style-type: none"> <li>* contractual agreements with facility owner and logistics organisations</li> <li>* contractual agreements with instructors</li> <li>* contractual agreements with all other parties involved</li> </ul> <p>5. Financial Management</p> <ul style="list-style-type: none"> <li>* follow up on the financial aspects of the use of the facilities and logistics</li> <li>* payment and invoicing management of the facilities</li> <li>* payment of the instructors and all other parties involved</li> </ul> <p>6. Quality assurance</p> <ul style="list-style-type: none"> <li>* ensure availability of quality assurance processes for a high quality delivery of the courses. This includes the infrastructure, the logistic services, instructors.</li> <li>* monitor the quality of the course delivery through adequate dashboards</li> </ul> <p>7. Reporting and follow-up</p> <ul style="list-style-type: none"> <li>* on a regular base the different facilities to be used will be evaluated on performance, cost, quality and other relevant KPI's.</li> <li>* regular meetings will be planned between the Partner and the facility owners. EIT InnoEnergy can be invited to take part in these discussions.</li> </ul> <p>EIT InnoEnergy and the Partner will set up Quarterly meetings to follow up on the performance of the overall training delivery.</p> <p>As EIT InnoEnergy is looking to organize these trainings European wide the Partner has to show the capability that the training might need to be provided in national languages in different countries.</p>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## 9. Course Delivery Execution and Management (including Quality Assurance)

### 9.1. Roles, responsibilities and dimensions

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Output	EIT InnoEnergy and the Partner will agree upon the reporting structure of the Course Delivery Execution performance on a regular basis.
Activity of the Partner	This aspect is completely outsourced by EIT InnoEnergy to the Partner.



	<p>The Partner will have the processes and systems (hardware and software) available to deliver following aspects of the roles and responsibilities in this activity:</p> <ul style="list-style-type: none"> <li>* in a direct relationship with big customer organisations, the mode of delivery will depend on the concrete wishes of the customer and that can take the form of a complete managed service. The details need to be discussed in each individual case.</li> <li>* for the LTP's they might have their own delivery infrastructure where the Partner system will need to interface. If their systems are not sufficient they should get the option to use a white labelled delivery platform from the Partner.</li> </ul> <p>These systems need to be very scalable. The following capacity needs to be build up in the next coming four years:</p> <table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>KPI</th> <th>2023</th> <th>2024</th> <th>2025</th> <th>2026</th> </tr> </thead> <tbody> <tr> <td># of LTP's</td> <td>50 LPT</td> <td>150 LTP</td> <td>150 LTP</td> <td>150 LTP</td> </tr> <tr> <td># of Industry customers</td> <td>5</td> <td>10</td> <td>20</td> <td>40</td> </tr> <tr> <td># of learners</td> <td>15.000</td> <td>35.000</td> <td>50.000</td> <td>100.000</td> </tr> </tbody> </table> <p>The Partner manages all operations, quality, train the trainer and governance of the LTP eco system.</p> <p>The Partner's System is the heart of the delivery in order secure a consistent EIT InnoEnergy / EBA Academy branded delivery in all countries. Country dependent modifications could be requested but need to be considered on individual basis.</p> <p>The partner shall show evidence of a track record and experience in the building and upscaling of a learning delivery system of these dimensions.</p>	KPI	2023	2024	2025	2026	# of LTP's	50 LPT	150 LTP	150 LTP	150 LTP	# of Industry customers	5	10	20	40	# of learners	15.000	35.000	50.000	100.000
KPI	2023	2024	2025	2026																	
# of LTP's	50 LPT	150 LTP	150 LTP	150 LTP																	
# of Industry customers	5	10	20	40																	
# of learners	15.000	35.000	50.000	100.000																	

## 9.2. Learning Delivery process

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Output	Learning Delivery process description Quality Management Handbook
Activity of the Partner	<p>Learning delivery process is completely outsourced to the Partner. The Partner is accountable for:</p> <ol style="list-style-type: none"> <li>1. On-line learning:                             <ul style="list-style-type: none"> <li>* course delivery via the Partner platform,</li> <li>* deliveries to key customers</li> <li>* LTP to do the sales and mkt and payment module on their own systems otherwise via the (white labelled) Partner platform</li> </ul> </li> <li>2. Blended learning:                             <p>Depending on the capabilities of the key customer or LTP it needs to be decided with the LTP and the Partner how to organize following the complete operations:</p> <ul style="list-style-type: none"> <li>* course planning, invitation of the learners for the course delivery...</li> <li>* the overall quality assurance,</li> <li>* processes for training certification</li> </ul> </li> </ol>

	<p>3. F2F course delivery Same as above.</p> <p>The Partner does the governance of the complete learning delivery directly to the customer or via the LTP network and has the operational aspects completely under control.</p>
--	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### 9.3.Partner tools to deliver the courses

The Partner has all necessary tools and systems (hardware and software) for the complete course delivery. These include the following functions (this is a minimum, a Partner can add tools which optimize the delivery of the courses, the quality of the learner engagement, ...) as described in the following tables:

#### 9.3.1. LMS Tool

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Activity of the Partner	This software includes following tools: <ul style="list-style-type: none"> <li>* the database of blended courses and digital courses</li> <li>* e-learning management tool</li> <li>* scheduling events tool</li> <li>* student assessment engine</li> <li>* curated learning paths tool</li> <li>* certification engine</li> <li>* reporting surveys and dashboards</li> <li>* recommendations engine e.g. based on the skills need defined by the industry and the required skills of a learner</li> </ul>

#### 9.3.2. Reporting tool and MIS

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Activity of the Partner	This tool includes all reporting elements such as: <ul style="list-style-type: none"> <li>* number of learner, courses taken</li> <li>* reports delivered on monthly basis and discussed with EIT InnoEnergy on course consumption per country/ course, completed courses, courses per trainer...</li> <li>* consumption per individual account (direct sales)</li> <li>* consumption per LTP</li> <li>* financial management tool for billing and accounting</li> </ul>

#### 9.3.3. Customer Acquisition tool

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Activity of the Partner	The Customer Acquisition tool ensures

	<ul style="list-style-type: none"> <li>* the complete management of the learning journey of each learner from the identification of a skills need, course selection, through payment, course delivery, examinations, accreditations and suggestions for next courses</li> <li>* course registration</li> <li>* course payment via the e-commerce paying platform</li> <li>* manages and follow up of the help desk tickets</li> <li>* follow up on the learners throughout their whole learning trajectory</li> </ul>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

#### 9.3.4. Portals

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Activity of the Partner	<p>The Portals are a means by which the LTP's and/or individual key customers can link to the Partner Learning &amp; Development system. How this is done needs to be described by the Partner.</p> <p>Basically at least two 'portals' should be defined:</p> <ul style="list-style-type: none"> <li>* LTP Portals: can be white label portals or linked to the LTP distribution system</li> <li>* Key customer portals: lighthouse customers can have their own portal customized for their use</li> </ul>

#### 9.3.5. CRM Tool

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Activity of the Partner	<p>The CRM Tool of the Partner needs to take care of:</p> <ul style="list-style-type: none"> <li>* helpdesk management (telephone and via mail )</li> <li>* event delivery management</li> <li>* invitations for the learners</li> <li>* hosting management of the events</li> </ul>

#### 9.3.6. Quality Management Tool

Activity EIT InnoEnergy	<p>EIT InnoEnergy outsources this function to the Partner.</p> <p>However EIT InnoEnergy will keep the possibility to do independent quality checks ( by themselves or by an assigned independent third party) on all levels of the delivery process.</p>
Output	<p>Quality Management Handbook</p> <p>EIT InnoEnergy and the Partner will agree upon the reporting structure of the Quality delivered performance on a regular basis.</p>
Activity of the Partner	<p>The whole delivery process needs to be quality assured. This is necessary for internal reasons but also for the accreditation bodies.</p> <p>The Partner has, as mentioned above , the freedom to propose their own processes around the tasks described in this document. In such a way the Partner can propose their own quality processes and the Quality Management Handbook which accompanies them with a minimum number of adaptation to the specific EIT InnoEnergy situation. In this way EIT InnoEnergy can bootstrap</p>

	<p>on the already existing processes, related Quality Handbooks and Quality Assurance procedures.</p> <p>The Partner will make sure the developed Quality Standards are in line with the Accreditation needs as described in section 2. Accreditation</p>
--	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### 9.3.7. Billing and Money collection tool

Activity EIT InnoEnergy	EIT InnoEnergy outsources this function to the Partner.
Output	EIT InnoEnergy and the Partner will agree upon the reporting structure of the Billing and Money collection on a regular basis.
Activity of the Partner	<p>The Partner has the relevant tools to do the billing and money collection for individual learners, key customer organisations and LTP's. Billing and money collection is automatized as much as possible to deliver a continuous and flowless service.</p> <p>On the other hand, in the implementation phase the financial procedures will be define by EIT InnoEnergy and the Partner on how these transactions will be handled in line with the requirements of both parties.</p>

### 9.4. The Partner - EIT InnoEnergy Tool Connections

Activity EIT InnoEnergy	<p>The link between the EIT InnoEnergy tools and the Partner tools need to be specified. This needs to be discussed in detail when further collaboration is set up:</p> <ul style="list-style-type: none"> <li>* are all courses published in the Partner LMS? Or will there still be an EIT InnoEnergy LMS?</li> <li>* is the EIT InnoEnergy controller going to be replaced?</li> <li>* is there a transition necessary where the EIT InnoEnergy content is re-published in the Partner repository?</li> <li>* is a standard tool used as authoring tool?</li> <li>* is there a possibility of connecting the billing an money collection tools?</li> </ul> <p>This will be subject to a dedicated project covering this topic.</p>
Output	Plan for all the implementation of all the connections between the EIT InnoEnergy and the Partners' tools.
Activity of the Partner	

## 10. Logistics Support (all IT systems – internal and external)

Activity EIT InnoEnergy	<p>EIT InnoEnergy and Partner will define the optimal use of the IT systems as a core service and strategic product and central part of the product suite of EIT InnoEnergy and EBA Academy.</p> <p>The IT Architecture is in modern Learning and Development processes not just a commodity, but rather one core element of the learning service.</p> <p>The core functionalities of the IT Architecture include especially</p> <ul style="list-style-type: none"> <li>* learning experience</li> </ul>
-------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<ul style="list-style-type: none"> <li>* learning activation systems</li> <li>* smart learning journeys</li> <li>* data analytics : for example learner data</li> <li>* people analytics : job type, skills and competencies background</li> </ul> <p>The Partner and EIT InnoEnergy will together define the optimal IT structure taking into account the target public, the European (and eventual worldwide) distribution of courses and the course portfolio to be developed in next stages.</p>
Output	Common Vision on the IT Infrastructure
Activity of the Partner	<p>The Partner will take responsibility for the complete IT infrastructure including IT Architecture and IT Systems such as LMS, LXS, Learner Data, Quality assurance</p> <p>Therefor a common vision needs to be developed including:</p> <ul style="list-style-type: none"> <li>* the IT tool is the engine behind every process optimization in learning and development. Hence a 100% connect to the process suite from the Partner needs to be established.</li> <li>* joint strategy and IT Architecture approach</li> <li>* due diligence on IT systems from the LTP's to define the optimal structure</li> </ul> <p>SLA's need to be further discussed. Current existing SLA's from EIT InnoEnergy to support the existing LTP's need to be integrated with the SLA's of the Partner.</p> <p>This include:</p> <ul style="list-style-type: none"> <li>* on which level are SLA's currently available?</li> <li>* between which parties?</li> <li>* what are the details of this SLA's?</li> </ul> <p>GDPR agreements : the current agreements need to be reviewed and integrated into the new agreements where the Partner is the outsourcing partner.</p>

## 11. Content and Curriculum Creation Services

### 11.1. Content design methodology

Activity EIT InnoEnergy	Content creation and adaptation services can be outsourced to the Partner on a project per project basis.
Output	Project Plans as described in point 6 above
Activity of the Partner	<p>In a course creation project EIT InnoEnergy is outsourcing the course creation aspects. As mentioned above (see Point 6) the course high level design will be the accountability of EIT InnoEnergy. When the project is assigned to the Partner the creation of the course materials will be the responsibility of the Partner.</p> <p>Online lessons developed by EIT InnoEnergy typically contain most of the following learning activities:</p> <ul style="list-style-type: none"> <li>• introduction with the Intended Learning Outcomes</li> <li>• short video lecture with illustrated transcript</li> <li>• glossary of important concepts</li> <li>• interactive practice activities or in-between knowledge test with feedback</li> </ul>

	<ul style="list-style-type: none"> <li>• reflection and discussion activity, such as business examples and online problem based cases</li> <li>• extra reading resources</li> <li>• summary</li> </ul>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### 11.2. Content creation aspects

Activity EIT InnoEnergy	Content creation and adaptation services can be outsourced to the Partner on a project per project basis.
Output	
Activity of the Partner	<p>The actual content creation task outsourced to the Partner include:</p> <ul style="list-style-type: none"> <li>* content writing/curation activities and steps</li> <li>* scripts, storyboard, proofreading</li> <li>* media production: video, audio, visuals, slides, gamification and simulation, AR and VR technology, 2D and 3D animation,</li> <li>* implement modules in LMS and delivery platform</li> <li>* teaser development &amp; Marketing actions</li> <li>* course release (cf. contacts webinar)</li> <li>* pilot testing with Test friendly audience</li> <li>* organize evaluation of individual learners: instrument, examination data collection, interpretation results</li> <li>* organize evaluation of the complete course and the complete project</li> <li>* revise on a regular basis the content and advise for the updating of the material</li> </ul>

### 11.3. Additional Services

Activity EIT InnoEnergy	Additional services are one-time projects which can be outsourced to the Partner on project basis. On request of EIT InnoEnergy the Partner can give a quote to execute the project. EIT InnoEnergy keeps the right to decide on who will execute the project.
Output	
Activity of the Partner	<p>Additional services are one-time projects which can be outsourced to the Partner. Examples of such projects can include:</p> <ul style="list-style-type: none"> <li>* translation services</li> <li>* localisation services</li> <li>* migration of content between different databases</li> <li>* help with setting up a project using 3D tools to create a Virtual Gigafactory and develop it as a learning environment. The concept of the Virtual Giga Factory: The virtual Gigafactory is a full 3D model and (limited) digital twin or simulation of a Gigafactory for the purpose of training. The virtual Gigafactory is a digital training facility implemented with AR/VR that is aware of all job profiles that are needed to build and operate a Gigafactory. In addition, it supports all the learning formats and content to support the skill development required for those jobs.</li> </ul> <p>Other specific projects can be added on the initiative of the Partner or EIT InnoEnergy as the Partnership will be further developed.</p>

	These projects will be handled on a project per project basis.
--	----------------------------------------------------------------

#### 11.4. Product Service Automation Roadmap

Activity EIT InnoEnergy	
Output	Product Service Automation Roadmap
Activity of the Partner	The Partner will provide a roadmap on how the contents, products and services will be impacted by technological innovation for example AI, ML, to reduce costs and increase speed of delivery. The Partner will describe more concrete how these technologies will be used and what are the expected outcomes.

#### 11.5. Project management

Activity EIT InnoEnergy	
Output	
Activity of the Partner	<p>To meet these targets the Partner will assign the needed Project Management capability to follow up all these projects:</p> <ul style="list-style-type: none"> <li>* for general project follow up: kick-off, bi-weekly meetings, intermediate meetings, quarterly reviews</li> <li>* for communication and reporting</li> <li>* Quality control and evaluation</li> </ul> <p>Tools and guidelines will be used such as:</p> <ul style="list-style-type: none"> <li>* Market Value Proposition</li> <li>* Detailed Gantt chart &amp; deliverables – lean, iterative design</li> <li>* Financial planning per deliverable</li> <li>* Responsibilities of team members (RACI)</li> <li>* Project risk and mitigation plan</li> <li>* Planning of digital learning design</li> <li>* EIT InnoEnergy branding guidelines</li> </ul>

### **EIT InnoEnergy and the Partner will collaborate in setting up the operational execution of the processes and tasks mentioned above**

Within the lines of the collaboration agreement an implementation project will be set up to implement all the processes described above. The aim is to have started setting up the basis for the operational execution in a time frame from 3-6 months. In a second phase the plan is to scale up the operations in the coming years to a level as mentioned in the table in point 9.1.

At the final assignment of the Partner, Project Managers from both sides will be assigned. The high level implementation plan will be available one month after assigning the Partner. The Project Managers will define the Project Governance structure including reporting structures, escalation structures, fixed yearly meeting schedules. The Project Managers will agree on a more detailed implementation scheme and the necessary project follow up procedures.

After the assignment of Project Managers on both sides, Working Teams from both sides will be created to discuss the Business, Legal, Finance and the Operational set up. From than onwards the different working groups can start the further detailed discussion, planning and execution in their specific areas.

As described above EIT InnoEnergy is looking for an experienced Partner to execute these services. The Partner is requested to propose a high level project plan to realize the implementation of the processes as mentioned above.

If the Partner uses a different implementation methodology to implement the collaboration with EIT InnoEnergy it can be proposed. In agreement an commonly agreed upon implementation strategy will be worked out.

#### 4. Proposal Process

##### 4.1. Participation

- a) Participation in this proposal procedure is open to all tenderers.
- b) All participants must sign the Tenderers' declaration form attached and submit it with the proposal. Please note that the tenderer may not modify the text, it has to be submitted signed as provided by EIT InnoEnergy attached to the request for proposal document.

##### 4.2. Submission of proposal

	DATE (Calendar dates)
Publishing RFP on the web site	14/10/2022
Deadline for requesting clarification from EIT InnoEnergy	04/11/2022
Deadline for submitting proposals	18/11/2022
Intended date of notification of award	09/12/2022
Intended date of contract signature	31/12/2022

Proposals must be emailed in **English** to the following address to:

**Contact name:** for the attention of Mrs. Oana Penu

**E-mail:** oana.penu@innoenergy.com

**The proposal shall contain:**

- **the technical response to the service requested (point 3) including a high level project plan to start the execution.**
- **the financial offer (the price for the services.)** The Financial offer must be presented in **Euro**. Prices must be indicated as net amount + VAT.
- **an indication of supplier's insurance coverage.** The proposal must specify whether the supplier has taken out a company liability insurance and/or professional liability insurance including the maximum amount of coverage in **Euro** per event per insurance.

Responses should be concise and clear. The tenderer's proposal will be incorporated into any contract that results from this procedure. Tenderers are, therefore, cautioned not to make claims



or statements that they are not prepared to commit to contractually. Subsequent modifications and counter-proposals, if applicable, shall also become an integral part of any resulting contract.

The tenderer represents that the individual submitting the natural or legal entity's proposal is duly authorized to bind its entity to the proposal as submitted. The tenderer also affirms that it has read the instructions to tenderers and has the experience, skills and resources to perform, according to conditions set forth in this proposal and the tenderers' proposal.

*Tenderers are requested to submit with their proposal together with the filled-out Tenderers' declaration form (see point 4.1).*

#### **4.3. *Validity of the proposals***

Tenderers are bound by their proposals 120 days after the deadline for submitting proposals or until they have been notified of non-award.

The selected winner must maintain its proposal for a further 60 days to close the contract.

**Proposals not following the instructions of this Request for Proposal can be rejected by EIT InnoEnergy.**

#### **4.4. *Requests for additional information or clarification***

The request for proposal should be clear enough to avoid tenderers having to request additional information during the procedure. In case the tenderers are in need of additional information or clarification, please address it to the address below.

**All information requested or answered may only be done through written communication – email only. Answers will be provided via the EIT InnoEnergy call for proposal section on the website. All questions should be sent prior to deadline for requesting clarification as specified in 4.2. In case of complex or high value procurements, InnoEnergy could arrange a clarification session which will be communicated to the tenderers.**

**Contact name:** for the attention of Mrs. Katja Trued

**E-mail:** [katja.trued@innoenergy.com](mailto:katja.trued@innoenergy.com)

EIT InnoEnergy has no obligation to provide clarification.

#### **4.5. *Costs for preparing proposals***

No costs incurred by the tenderer in preparing and submitting the proposal are reimbursable. All such costs must be borne by the tenderer.

#### **4.6. *Ownership of the proposals***

EIT InnoEnergy retains ownership of all proposals received under this tendering procedure. Proprietary information identified as such, which is submitted by tenderer in connection with this procurement, will be kept confidential.

The potential or actual supplier should accept that during the implementation of the contract and for four years after the completion of the contract, for the purposes of safeguarding the EU's financial interests, EIT InnoEnergy may transfer the proposal and the contract of the supplier to internal audit services, to the EIT, to the European Court of Auditors, to the Financial Irregularities Panel or to the European Anti-Fraud Office.

#### **4.7. Clarification related to the submitted proposals**

After submission of the proposals, they shall be checked if they satisfy all the formal requirements set out in the proposal dossier. Where information or documentation submitted by the tenderers are or appears to be incomplete or erroneous or where specific documents are missing, EIT InnoEnergy may request the tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit. **All information requested or answered may only be done through written communication – email only.**

#### **4.8. Negotiation about the submitted proposal**

After checking the administrative compliance of the tenderers, EIT InnoEnergy may negotiate the contract terms with the tenderers. In this negotiation EIT InnoEnergy will ask all tenderers to adjust the proposal or specific sections of the proposal within an appropriate time limit. In case of negotiation, EIT InnoEnergy shall provide further information about the proceedings and timing.

#### **4.9. Evaluation of proposals**

The quality of each proposal will be evaluated in accordance with the below mentioned award criteria. The award criteria will be examined in accordance with the requested service indicated in Section 3 of the document.

***Please note: If applicable, Insurance Coverage needs to be incorporated in the technical evaluation criteria. The tenderers aim to send EIT InnoEnergy their insurance coverage for this particular service along with the proposals/offers.***

##### Evaluation criteria

1. Project experience and competences of the members of the proposed Partner project teams. (maximum point: 10)
2. Showing evidence of the proven track record of experience with the implementation of international Learning and Development processes at scale. (maximum point: 15)
3. The individual requirements stated in point 3 will be evaluated against the submitted proposals. (maximum point: 20)
4. Methodology approach of the project implementation and processes proposed to manage the outsourced tasks. This includes project management and interaction with EIT InnoEnergy for planning, delivery, quality feedback, proposed timeline, proposed procedures for outsourcing, follow-up and reporting (maximum point: 20).
5. Liability exposure: tenderer with best insurance coverage and least changes to contract template shall receive the highest score (maximum point: 5)

##### ***Total technical score: 70 points maximum***

6. Price or total cost of the project covering the installation and maintenance until end of 2026: lowest offered price shall receive the highest score, other shall be calculated in relation to that in linear equation. (maximum point: 30)

##### ***Total financial score: 30 points maximum***

##### **Total maximum score: 100.**

#### **4.10. *Signature of contract(s)***

The successful and unsuccessful tenderers will be informed in writing (via email) about the result of the award procedure.

For the contract the Service Agreement in Annex 2 shall apply. Any change desired by the tenderer in the provisions contained in the body of this Service Agreement needs to be communicated to EIT InnoEnergy as part of the proposal of such tenderer. Background for this is that such desired changes need to be taken into account in the evaluation of the proposal of each tenderer under Liability Exposure above. Significant changes are likely to lengthen the negotiation process, making it less likely that the Service Agreement can be signed in time.

Within 5 days, after the expiry of the appeal period of 10 days of receipt of the contract from EIT InnoEnergy, the selected tenderer shall sign and date the contract and return it to EIT InnoEnergy. Upon receipt, EIT InnoEnergy shall also sign and send back to the winner one signed copy. In case the winning tenderer is unable to enter into the contract within the above mentioned time period, EIT InnoEnergy may decide to contract the second best.

#### ***Duration of the agreement:***

The initial agreement will be signed with the winner of this tender for the period of 2 years.

After 2 years EIT InnoEnergy will perform the evaluation of the services provided by the vendor and if the results are satisfying and under the condition of availability of the budget EIT InnoEnergy may extend the agreement for 2 more years.

However, this does not bind EIT InnoEnergy in any way to carry out the contract extension with the winning tenderer.

#### **4.11. *Cancellation of the proposal procedure***

In the event of cancellation of the proposal procedure, EIT InnoEnergy will notify tenderers of the cancellation. In no event shall EIT InnoEnergy be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a proposal procedure, even if EIT InnoEnergy has been advised of the possibility of damages.

#### **4.12. *Appeals/complaints***

Tenderers believing that they have been harmed by an error or irregularity during the award process may file a complaint. Appeals should be addressed to EIT InnoEnergy. The tenderers have **10** days to file their complaints from the receipt of the letter of notification of award.

#### **4.13. *Ethics clauses / Corruptive practices***

EIT InnoEnergy reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities or fraud. If substantial errors, irregularities or fraud are discovered after the award of the Contract, EIT InnoEnergy may refrain from concluding the Contract.

The supplier shall take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests'). He should inform EIT InnoEnergy immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.



#### 4.14. *Annexes*

Annex 1: Tenderers' Declaration form.

Annex 2: Draft Contract Template.