**Request for Proposal**

**Data Science Learning Platform**

**InnoEnergy**

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# Overview of EIT and InnoEnergy

The European Institute of Innovation and Technology (EIT) is an EU body created by the European Union in 2008 to strengthen Europe’s ability to innovate. The EIT is an integral part of [Horizon 2020](https://ec.europa.eu/programmes/horizon2020/), the EU’s Framework Programme for Research and Innovation. The EIT drives innovation in Europe by supporting entrepreneurs, innovators and students across Europe to turn their best ideas into reality. It supports the development of dynamic, long-term European partnerships among leading companies, research labs and higher education. These partnerships are called [Innovation Communities](https://eit.europa.eu/our-communities/eit-innovation-communities) and each is dedicated to finding solutions to a specific global challenge, from climate change and sustainable energy to healthy living and food. In total there are currently 8 EIT Innovation Communities: EIT Climate KIC, EIT Digital, EIT Food, EIT Raw Materials, EIR Health, EIT Manufacturing, EIT Urban Mobility and EIT InnoEnergy.

This tender is opened by 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 the 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:
<https://www.innoenergy.com/about/about-innoenergy/about-us/>

# Scope of work

For its education services, EIT wishes to foster collaboration between the different Knowledge Innovation Communities (KICs) and to set up common tools and platforms. It thereby wishes to enable tools for collaboration and sharing of expertise and educational material between the KICs. In addition, the use of common tools can also achieve financial optimisation of development and operation costs.

Within the scope of this tender, InnoEnergy is looking for a performant **Data Science Learning Platform** that will allow us to **deliver hands-on Data Science / DataOps trainings** to different categories of learners (Engineers, Analysts, Managers, Generalists…).

This platform is put at the disposal of the InnoEnergy ecosystem, and the higher level of the EIT ecosystem, to promote the creation of digital learning and to foster collaboration and sharing among teachers, partner universities and content partners. Central to this strategy is the possibility to reuse digital learning material in other learning contexts, in the various MSc programmes, partner organisations and professional learning offers. Through the support of international e-learning standards such as LTI and xAPI, using such a service enables InnoEnergy and other KICs to put digital learning at the disposal of students and professional learners independent of the specific learning platform or Learning Management System of the partner.

The **Data Science Learning Platform** should become an integrative part of EIT InnoEnergy’s ecosystem and seamlessly integrate with our existing ecosystem of products, tools, and services as indicated below.

## Working with the existing ecosystem

The platform currently in use by EIT InnoEnergy is based on an integrations approach and builds on international e-learning standards for ensuring maximum interoperability with other learning platforms. The part highlighted in **Yellow** in the diagram hereabove refers to the **Data Science Learning Platform** that is the object of this tender.

The **Data Science Learning Platform** must support the **LTI** standard for linking existing learning materials to the distribution platforms with **single sign on access** (SSO) for the users. It should also support the **xAPI** standard for sending learner activity statements to a Learning Record Store (LRS) endpoint.

## Mandatory Requirements

The following items are essential requirements for the **Data Science Learning Platform**. Without these features or functionalities (or at least an alternative solution with the same or similar outcome) a software service cannot be considered for purposes of this tender.

* Support of the **Jupyter Notebook** framework to deliver Data Science courses (“coding courses”).
* Support of at least one **data visualisation** framework (such as “www.[metabase](https://www.metabase.com/).com”) to deliver Data Science courses (“data visualization courses”).
* **Auto-scaling of computational resources**. As the number of learners increases, the computational resources should scale accordingly.
* **Persistence of learners’ work**. Learners’ work should be stored on the cloud in a way that it can be tracked and evaluated in a consistent manner. Conversely, even after submitting their work for evaluation, learners should be able to access their work (or, in the worst case, a copy should be mailed to them at the time of submission).

## Summary of key features

In addition to the requirements mentioned above, the main features that the new platform must support or offer include the following:

### Functional requirements

### The Data Science Learning Platform must support the basic must-have requirements for a modern Learning Management System such as User Management, Content Management, Data Privacy (GDPR), Single Sign-On, Mobile-Friendly User Interface…

* **Support of LTI (SSO).**
* A clear **user management** system (admins, instructors, learners) with different access rights (based on who can access and modify what and when). Example: admin can add and remove instructors, instructor can add and remove co-instructors, instructor can set learner access to content...
* A clear **course management** system accessible to the instructors, where they can load the course contents and organize it modules/sections, install additional course libraries when needed and add course metadata (e.g. name, description, difficulty level, target audience, workload, author…). This should include a versioning and restore feature.

The course management system should also provide features to **facilitate the course execution**, such as setting of **deadlines** (the instructors should be able to set deadlines for submission of individual lessons) and setting of **notifications** (student submissions should sent a notification to the instructor).

* A **clean user interface** which allows learners to easily browse through the list of available courses, perform semantic **search** on content, **filter** and access content grouped by course, or by other metadata such as keyword, target learner, author, etc.

The user interface should also be customizable to support our **corporate identity** (change logo, fonts, color scheme…)

Additionally, there are also a number of nice to have features, including:

* Learners should have the ability to **work together on** **group projects.**
* **Comparing learners’ solutions**. By comparing learners’ results against each other, we can promote healthy competition and improve learning outcomes. Learners should be able to make their solutions public.
* **Auto-plagiarism checks** to check if different student notebooks are copied from one another or if there is sufficient novel work.
* **Automatic evaluation of student solutions**. This is a broader topic than comparing learners’ solutions against each other, which can be gamed and, in any case, does not measure the depth of overall student understanding.
* An **in-app feedback system**. Learners should be able to provide feedback from within the notebooks (e.g. in case there is a bug, broken links etc.)

### Cloud collaboration & publishing, analytics

The software should make collaboration between universities and other KIC partners easy:

* Co-author/collaborate online: assign and manage co-authors
* Reviewing module: ability to leave comments as feedback to co-authors
* Share: share with reviewer, share with test learners
* Reuse and permissions for reuse: add a piece of content to another module in construction and choose between either creating a copy of the material (when allowed by original author) or linking material (only when allowed by original author, authors are alerted about changes that can affect the original material)
* Flexible distribution: host material to be distributed in diverse LMS, LXP and MOOC platforms (integrations and/or import/export) - SSO enabled. Please indicate tested integrations with diverse LMS, LXP and MOOC platforms
* Publish as public or restricted content
* Support for SCORM 1.2 and 2004, xAPI, CMI5 (host content centrally for live/remote updates in distribution platforms, no re-exporting of packages needed)
* Various specialised Content libraries can be built up that can be distributed via diverse channels such as LMS, LXP. These can be administered by different teams
* Reporting of learner activity based on xAPI (send to LRS endpoint): send statements over the LTI connection regarding page views, video play, pause, stop, activity on MCQ or other interactive templates such as nr of tries, answers given and results, time spent, nr of discussion posts

### Requirements regarding service management

#### Business continuity

* EIT InnoEnergy expects the delivered software is available at least 99% of time (maintenance windows are excluded). This includes direct access to the **Data Science Learning Platform** and editing of contents as well as the accessibility of contents that are being loaded from other platforms (via an LTI link)
* Availability level should be measured at monthly basis and results should be communicated regularly
* Not meeting of the availability level will result in penalties as per the future final agreement (e.g. fee deductions)
* The provider should prepare detailed Disaster Recovery Plan (DRP) in order to minimize the disruptions to the users. That plan should be regularly verified (at least once per year) by the test execution on separated environment
* Mean time to recover should be proposed
* All data stored and processed within the system should be regularly backed up. Back-up procedures should be agreed with EIT InnoEnergy (recovery points should be agreed for all critical modules of the software). Back-up schedule and data recovery procedures should be included in DRP

#### Communication regarding maintenance windows

* Maintenance windows any operations impacting system availability (outages, partial unavailability, performance issues, etc.) can be allocated in the slots mutually agreed with EIT InnoEnergy and should take place out of business hours
* Maintenance windows must be communicated to system users in advance via agreed communication channel (preferably: email distribution list and system message)
* A reasonable notice period for such notifications should be installed, e.g. 3 hours outage must be announced 3 business days before it takes place
* Notification should contain exact timeslots (planned start, planned end) and description of operation purposes
* If any actions are expected from the users, it should be very clearly stated in the notification
* Deployment operations including new or significantly modified functionalities should followed by a detailed list of modifications
* Instructional materials must be updated within maintenance window unless agreed differently
* URLs of the supported services during outage time should respond with maintenance window notification

#### Software development lifecycle and quality assurance

* The SaaS is assumed to be immediately operational as a fully functional and independent software. However, it is expected that continuous further development of the service will take place
* EIT InnoEnergy does not force the provider for any particular software production methodology
* The development lifecycle should be documented (and managed internally)
* Through ‘software certification’ it will be ensured that the introduced changes meet general quality standards and are safe to existing functionalities
* EIT InnoEnergy expects the provider to conduct internally unit, functional and regression testing
* The provider should prepare the environment where EIT InnoEnergy representatives can conduct the final testing
* Backward compatibility with existing content should be guaranteed
* Only changes that passed certification process and were accepted by EIT InnoEnergy can be productionized
* Software should be scalable as per EIT InnoEnergy needs. The provider must conduct full performance testing at least once per year and report the results with potential gap analyses and improvement plan
* Each deployment operation should be followed by post-production sanity checks before the system is fully returned back to the users

#### User support

* By ‘support’ parties understand telephone, email and chat help services provided to the users
* This support might include the direct use of the SaaS or the integration of content created in standard compliant learning platforms
* Support should be provided preferably 24 hours a day and 7 days a week unless agreed differently
* The provider should prepare system issues categorization based on severity with Service Level Agreement proposal (mean time to repair)
* The provider will report the up-to-date issues list with assigned severity and resolution progress at least on weekly basis
* The highest severity issues (critical software functionalities not usable) should be processed with maximum possible effort and at least workaround solution must be put forward if the final fix is of higher complexity

## Deliverables

The successful supplier would be expected to deliver the following:

* Overview of supported integration standards for exporting and for linking contents into external LMS of LXP;
* Examples of content modules with the Data Science Learning Platform;
* Information about training programme for super admins and manuals (for main admins and more basic user level);
* Solutions for migrating existing repository content, including testing;
* Ongoing support for admins, instructors and learners.

## To be included in the proposal

To understand the possibilities of the platform/portal proposed, to gauge the scope of the services provided and obligations associated with it, EIT InnoEnergy requests that the tender includes the following:

* A summary with general information about the company and partners;
* A table summarising each of the requirements as set out in the scope with an indication of whether it is addressed or not. See 3.1, 3.2, 3.3. And to which extent;
* List of tested LMS/ LXP / MOOC platforms
* A recommended implementation timeline to ensure the platform is ready at the date agreed by both parties;
* Description of the administration/ support that will be given to EIT InnoEnergy (A 24/7 support level is preferred). This information will be discussed and included in the “Support service agreement”;
* Summary with information of any obligations EIT InnoEnergy must comply, if any;
* Design fee, annual fee and any other mandatory payments for the setup and use of the platform. For the first year, a maximum of 10 author licenses is expected to be needed, reviewers should be able to view and comment the contents under a free access;
* Terms of payments should be also included on the offer. EIT InnoEnergy payments are made within 30 days from the date of the invoice.

## Timeline and planning

EIT InnoEnergy has prioritized this project and we endeavour to launch the new platform as early as possible in Q4 2020 / Q1 2021. The delivery and implementation timeline will be agreed by both parties. Please note that implementation time is weighted in evaluations.

After the selection process, a contract of one year will be signed with the winning tenderer.

In case of a successful platform implementation and satisfactory service delivery, EIT InnoEnergy may extend this contract with 1 more year under the exact same conditions to ensure a successful further project. This will only be the case when the Business Plan is agreed upon and there is budget available.

# Proposal Process

## Participation

* Participation in this proposal procedure is open to all tenderers;
* 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 must be submitted signed as provided by EIT InnoEnergy attached to the request for proposal document.

## Submission of proposal

|  |  |
| --- | --- |
|  | **DATE (Calendar dates)** |
| Sending out RFP invitations to the potential suppliers | 24/07/2020 |
| Deadline for requesting clarification from EIT InnoEnergy | 12/08/2020 |
| Deadline for submitting proposals (24:00 CET) | 28/08/2020 |
| Intended date of notification of award  | 11/09/2020 |
| Intended date of contract signature | 18/09/2020 |

Proposals must be emailed in English to:

**Contact names**: for the attention of Anouk Gelan, Fabien Gauthier

**E-mails**: anouk.gelan@innoenergy.com, fabien.gauthier@innoenergy.com

**The proposal shall contain:**

* **The technical response to the service requested (point 3);**
* **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 Europer event per insurance;
* **The terms and conditions to the service agreement.**

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 outlined 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).

## Validity of the proposals

Tenderers are bound by their proposals for 90 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.**

## 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 need 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. All questions should be sent before deadline for requesting clarification as specified in 4.2. In case of complex or high value procurements, EIT InnoEnergy could arrange a clarification session which will be communicated to the tenderers.**

**Contact names**: for the attention of Anouk Gelan, Fabien Gauthier

**E-mails**: anouk.gelan@innoenergy.com, fabien.gauthier@innoenergy.com

EIT InnoEnergy has no obligation to provide clarification.

## 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.

## 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.

## 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.**

## 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.

## 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.

### Evaluation criteria

|  |  |
| --- | --- |
| **Technical Criteria** | **Points** |
| Integration with existing EIT InnoEnergy ecosystem of platforms and tools | 10 |
| Number of key functional requirements that can be addressed successfully and approach to addressing those (3.1, 3.2, 3.3) | 35 |
| Quality of deployment and operation of service (3.3.3) | 10 |
| Proposed Implementation, migration and delivery timeline.Shorter timeline will receive higher score. | 5 |
| Training programme and ongoing support | 5 |
| Availability of company liability insurance | 5 |
| **Total score for technical criteria**  | **70** |
| **Financial Criteria** |  |
| Lowest offered price shall receive the highest score, other shall be calculated in relation to that in linear equation | 30 |
| **Total score for financial criteria**  | **30** |
| **Total maximum score** | **100** |

##  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 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 of receipt of the contract from EIT InnoEnergy, the selected tenderer shall sign and date the contract and return it to the 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 time mentioned above period, EIT InnoEnergy may decide to contract the second best.

##  Cancellation of the proposal procedure

In the event of cancellation of the proposal procedure, EIT InnoEnergy will notify the 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.

##  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 3 days to file their complaints from the receipt of the letter of notification of award.

##  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.

##  Annexes

Annex 1: Tenderers’ Declaration form.

Annex 2: Draft Contract Template: <IE’s contract template or Suppliers template> after approval from Legal dept.