



Co-funded by the  
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Skills.move2.0

# Request for Proposal



# Contents

- 1. Context .....2**
  - 1.1 About EIT Manufacturing.....2
  - 1.2 About the education pillar .....2
  - 1.3 Products of the education pillar .....2
  - 1.4 Current platforms of the education pillar .....3
  - 1.5 Purpose of this document .....3
  - 1.6 NDA 3
- 2. Description.....4**
  - 2.1 RfP objective .....4
  - 2.2 Solution outline.....4
    - 2.2.1 CMS module .....5
    - 2.2.2 LMS module.....11
  - 2.3 Other requirements.....14
- 3. Deliverables .....18**
  - 3.1 Perimeter .....18
  - 3.2 Project timeframe.....19
  - 3.3 Test 19
- 4. Submission of proposal.....19**
  - 4.1 Timeline.....19
  - 4.2 Proposal structure .....20
- 5. Evaluation Criteria and Award Notification .....20**
  - 5.1 Complaint procedure.....21
  - 5.2 Clarifications .....22
  - 5.3 Negotiations.....22
  - 5.4 Contract .....23
  - 5.5 Cancellation of the proposal procedure.....23

# 1. Context

## 1.1 About EIT Manufacturing

EIT Manufacturing (KIC) is focused on promoting entrepreneurship, innovation, and education in the domain of Manufacturing. EIT Manufacturing brings together leading organisations along the entire value chain from smaller companies to larger industry, excellent academic and research institutions, as well as public sector organisations, to promote the transformation of manufacturing towards the digital economy, towards the circular economy and the decarbonization of industry, by removing barriers to innovation, promoting talent and education, leveraging enabling technologies and exploiting big-data.

Among Europe it exists 9 other KICs with the one we can participate to lead the action and create services across Europe and improve the competitiveness of European companies.

EIT Manufacturing is an association under the law 1901 created in 2019; EIT Manufacturing works in three essential areas of the innovation mix: innovation, education and business creation.

## 1.2 About the education pillar

EIT Manufacturing, with its Education pillar, aims to help creating an informed and ambitious workforce that understands the demands of sustainability and the needs of industry. EIT Manufacturing's education programmes provide innovative, customised and industry-driven knowledge and the ultimate skills in order to shape the future of manufacturing. The education pillar has, as main objective, the upskilling and the reskilling of the current and future manufacturing workforce in Europe.

## 1.3 Products of the education pillar

Considering the mission described above, the education pillar has been supporting the development of a portfolio of educational services which include the following products:

- Digital Courses: asynchronous courses currently hosted and consumed on a digital learning platform called Skills.move ([www.skillsmove.eu](http://www.skillsmove.eu)). They are of two types:
  - o Nuggets: self-contained and consistent learning units, consumable as stand-alone course
  - o Learning Paths (LPs): aggregation nuggets
- Live courses, frontal classes which can be distributed online or in person
- Blended courses: mix of asynchronous and synchronous training contents
- Learning Journeys: aggregation of some of the previously mentioned products (e.g. 2 LPs and a workshop).

All these products will be included in the Skills.move2.0 “Catalogue” that is mentioned later in this document.

## 1.4 Current platforms of the education pillar

The educational products of EIT Manufacturing are currently showcases and sold on three different sites:

1. Skills.move, digital learning platform ([www.skillsmove.eu](http://www.skillsmove.eu))
  - a. Moodle-based solution
  - b. integrates mainly two plugins: Intellicart and Intelliboard
  - c. it hosts all digital courses
2. Learning factories marketplace
  - a. Wordpress-based solution
  - b. integrates WooCommerce plugin for e-commerce
  - c. integrates YITH WooCommerce Multi Vendor plugin for enabling multivendor features
  - d. showcases and sells blended learning experience
3. A website, called Umbrella
  - a. Wordpress-based solution
  - b. has the aim of showcasing products and services included in the education portfolio

## 1.5 Purpose of this document

The purpose of this Request for Proposal (RfP) is to select one supplier to deliver an off-the-shelf, configured and customized solution called Skills.move2.0. It will represent a key asset for EIT Manufacturing in commercializing and delivering learning contents aiming to educate and train current and future workforce. It will be open to both private and corporate users with varied logics of access, authoring, purchasing and usage.

Skills.move2.0 solution, purpose of this tender, will:

- replace functions currently available in Skills.move
- host all courses currently in Skills.move
- include a catalogue with the products of the education pillar
- is part of the Umbrella, probably as subdomain (to be discussed).

## 1.6 NDA

The interested supplier is asked to declare his interest in participating in the bid and to sign a Non Disclosure Agreement (NDA). This should be shared with [linda.ferro@eitmanufacturing.eu](mailto:linda.ferro@eitmanufacturing.eu) by email having as subject header: **“Skills.move2.0 bid – NDA signed - [name of your company]”**.

Following the supplier will receive all Annexes mentioned in this document.

## 2. Description

### 2.1 RfP objective

The purpose of this RfP is to select a supplier to provide, configure and deploy Skills.move2.0 as Software as a Service. In other terms, once the solution will be set up, up and running, the supplier will provide hosting, platform maintenance and updates, improvements, as well as support. Moreover, training to team members and guideline are included in the perimeter.

Learners will be able to browse a catalogue of courses, select and purchase some of them, consume courses, experience hands-on training, consult their training progress, earn badges and certificates. Other users, such as the administrator, authors or teachers will be able to, among other functions, configure the system, manage permissions, create learning content, assess the content from the quality perspective, manage the learning experience of the users, perform reporting.

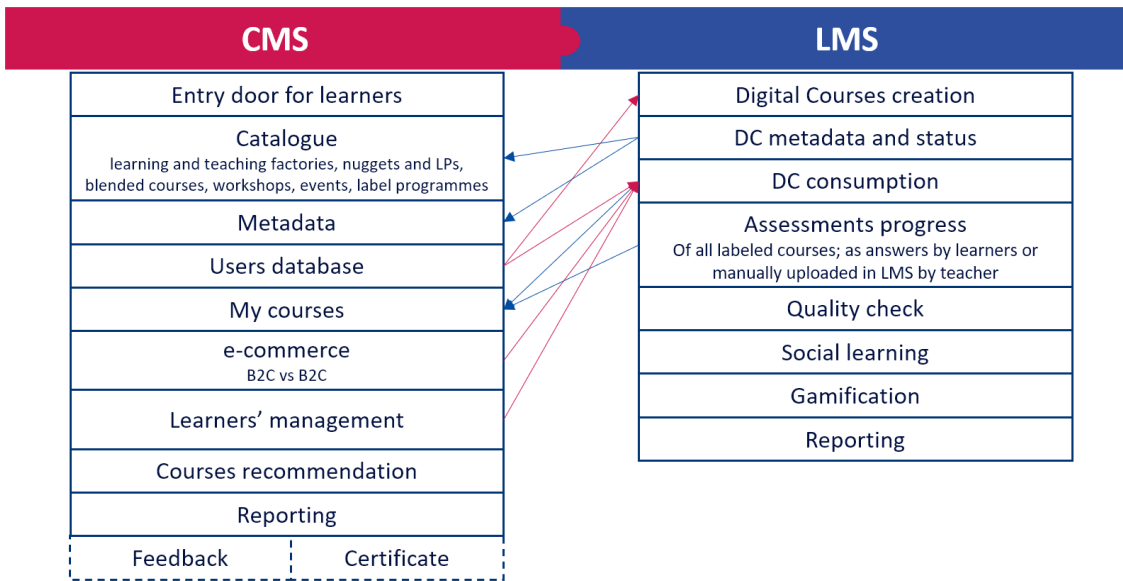
### 2.2 Solution outline

EIT Manufacturing envisions the development of Skills.move2.0 as an integrated solution between an LMS and a CMS.

Considering the solutions currently used by EIT Manufacturing, their expected correlation with Skills.move 2.0 (see paragraph 1.5) and the requirements listed in this document, the supplier is asked for proposing the most suitable technologies on which the Skills.move 2.0 would be based.

The picture below describes the building blocks of the solution and proposes a split among mainly two software applications: a CSM and an LMS. Following, each building block is introduced.

Note: EIT Manufacturing is ensure whether it would be better to integrate the above mentioned Learning Factories Marketplace with the CMS module or to go for a manual update of the information. This will be evaluated based on the proposed solution and the cost-benefit ratio.



The supplier is asked to evaluate the proposed split among the blocks (see the picture above) and is requested to::

1. Highlight pro and cons of a CMS-LMS integrated approach, in comparison with a solution 100% based on a LMS
2. Detail potential weaknesses of the approach
3. If necessary, propose an alternative subdivision of the building blocks between LMS and CMS and include a justification.

Those considerations should be included in the section 1 of the “Annex 2 – Proposal template”.

It would be appreciated if the supplier includes in this same session a draft of the solution architecture (simplified) he intends to implement.

## 2.2.1 CMS module

Comments on the CMS module should be included in the section 2 of the “Annex 2 – proposal template”.

### Entry door for learners

A landing page that welcomes the users to Skills.move 2.0. From here the user decides rather to navigate the catalogue, go to “my courses section”, or to access the LMS in case he is an author/teacher/admin. This page includes the possibility to create an account and to login.

### Catalogue

The catalogue showcases the full list of courses of EIT Manufacturing as “cards”.

The catalogue presents a series of “cards” illustrating basic information about the course on which the users can click and land on a “more details” page dedicated to the single course. The design of the cards will be part of the development of the catalogue and UX definition.

The courses are of three main natures:

- Integrated with the LMS: Digital Courses (DC)  
The content of the course is created and hosted in the LMS, while the catalogue displays the “cards” that include title, description, image, some metadata (eg target, learning outcomes). The course is published on the catalogue only if a certain condition is met (e.g., status of the course) and its information are updated coherently with the information/metadata added in the LMS
- Integrated with the Learning Factories Marketplace<sup>1</sup>  
The products are created in the marketplace with their respective metadata. As for above, the course is published on the catalogue only if a certain condition is met (e.g., status of the course) and the information are updated coherently with the metadata updated in the Marketplace
- Self-standing in the catalogue: blended courses, workshops, events, learning journeys.  
These are courses created in the CMS. The enrolment and consumption of such courses envision an interaction out of the platform between the learner and a third party, identified in accordance with the type of course. As for the DC, a course cover and some information/metadata are displayed in the catalogue.

Briefly, each product is characterized by a proper set of metadata which are retrieved from the LMS and from the Marketplace or uploaded from the backend of the catalogue.

The catalogue layout, navigation and displayed information help the user the easily identify the different types of courses (nuggets, learning paths, workshop, learning journeys, ...);

As mentioned above, the learning “learning journey” includes more than one course. In this case, the “more details page” illustrates details about the learning journey and includes the “cards” of the single courses included on it.

The learner can:

- buy the full journey; then it’s assumed he has bought all courses included in it
- request more information filling in a contact form.

From the catalogue, the learners can:

- search for a course using a search bar (as google)
- search for a course using filters which works on the metadata
- buy a course
- save a course as favourite
- enroll in a course.

All users can see all contents from the catalogue, unless of specific permissions/visibility setting (for a single user or a group).

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<sup>1</sup> As possible option. See Note in the paragraph 2.2.

Some nuggets, for instance assessment nuggets, can be consumed as part of a learning path, but not as stand alone content. Those nuggets are not visible as available course from the catalogue.

It is possible to share a link to a course; it directs the guests or users to the detail page of the specific course.

Note about the Learning Path: Users are not able to see which nuggets compose a LP.

### **Metadata**

EIT Manufacturing has developed his own metadata structure coherently with its core business and targets; a draft list of metadata is illustrated in Annex 3 - Metadata.

EIT Manufacturing wants to be able to manage by itself the metadata structure by, for instance, adding or replacing a category or editing its type (e.g., from multi single to multi selection); changes should trigger an auto sync of all the metadata (in the case of category replacement or merge) or retrofitting (in the case of category addition).

Metadata are defined, at course level, by:

- the admin in the CMS, for the courses created in the CMS
- the authors in LMS, for digital courses
- the authors in the Learning Factories Marketplace, for some of the blended courses<sup>2</sup>.

In addition:

- some of the metadata characterize all types of courses (eg. title, description, target), some other only part of them (i.e., % of ownership is for nuggets, but not for LPs)
- only part of the metadata is displayed in the catalogue
- some fields are private (for admin only)
- some fields are mandatory
- metadata is retrieved from the LMS, Learning Factories Marketplace and CMS depending on the course type
- some specific metadata field are defined in the CMS, independently from the type of course and it's origin .

Metadata can be massively imported, edited and exported.

The database structure must allow the scalability of the solution, most of all in terms of number of courses.

### **Users database**

People can navigate the catalogue without registering (guests), but everybody needs to create his own account to enrol, purchase or save a course as favourites.

Users are characterized by some profile fields which in part mandatory and in part optional.

As all users enter into Skills.move2.0 through the “entry door” and the “catalogue” in which it's asked them to register; therefore the CMS plays a master role in storing the users' database.

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<sup>2</sup> As possible option. See Note in the paragraph 2.2.



Once the user lands on the LMS because, for instance, he wants to create or consume a course, the solution tracks user's actions and behaviour. Indeed, the specific user is recognized as previously registered in the CMS. This works with a Single Sign On (SSO) authentication scheme.

Users can have one or more system roles in the solution and act in both the modules in accordance with the permissions conferred to the role(s):

- Administrator: configure and govern the solution
- Author: creates courses and set certificates
- Sales: access all content (in progress and published), registers orders and gives the teachers the possibility to manage the classroom experience
- Distributor: access a set of content, registers orders and gives the teachers the possibility to manage the classroom experience
- Auditor: reviews DC as part of the Quality Check process (check paragraph 2.2.2 for more details)
- Peer: same as Auditor
- Teacher: manages learning experience of a group of learners by for example assigning courses, monitoring learners' progress, following up with the learners, setting a due date
- Learner: navigates the catalogue, selects, buy and consumes courses, monitors his/her progress.

The database structure must allow the scalability of the solution in terms of number of users.

### **My courses**

It includes the list(s) of courses of interest of a signed-in user and, in particular:

- To be started courses: bought, enrolled, assigned courses
- In progress courses
- Completed courses
- Preferred/saved as favourites courses

The courses can be represented in different tabs or as a unique list with proper characterizing information and filters. This level of detail will be part of the project development phase, in particular of the blueprint, and evaluated based on the best value for money criteria.

### **e-commerce**

The signed-in user is able to select courses from the catalogue and buy them.

Some of the courses are offered for free (e.g., nuggets, but also some events or other type of products).

The e-commerce function covers mainly the B2C portion of the Skills.move2.0 business model and it should be able to address the following processes:

- Courses selection, add to cart
- Order management
- Payment process (preferred payment system: credit card, bank transfer, Paypal)
- Coupon and discount management
- Collection of information needed for invoicing
- Invoicing
- Discounts management

As a result of the successful purchase, the learner is enrolled into the course.

In addition:

- It should be possible to manually register a B2B order that was negotiated out of the platform (for a set of products, at a certain price). As a result, the system makes available to the learners/teacher the bought courses
- Private users need to be distinguished from corporate users as the two are characterized by different information and processes.

Finally, some of the courses include a contact form that allows the user to contact the course owner. In this case the enrolment is not meaningful.

The supplier should take into consideration that EIT Manufacturing has already configured an e-commerce function in the Learning Factories Marketplace (using the plugins WooCommerce and YITH WooCommerce Multi Vendor). Re-using this function is not mandatory, but the supplier is asked to consider this a possible option and justify its adoption/not adoption in the proper section of the Proposal template.

### **Learners' management**

Skills.move2.0 is thought as a ready-to-be-used tool for teachers and managers who are willing to upskill and/or reskill their students or colleagues.

Therefore, EIT Manufacturing allows a specific Teacher to assign a predefined number of seats for a specific course to a set of learners. In this case the course can also be "not published". The learners are identified with the email and can be "already sign-in" or "not sign-in". As a result, the learners are enrolled into the specific course.

This function is currently called "LP licences" in Skills.move and the Annex 4 "guideline - License management for teachers - Learning Path Access" illustrates it.

Other option is that the EITM allows the Teacher to assign a predefined number of licences to a set of learners which, as result, are able to enrol in all published digital courses, including LPs under payment.

This function is currently called "Full Access licences" in Skills.move and the Annex 5 "guideline - License management for teachers - Full Access" illustrates it.

Following, the Teacher is also able to monitor learners' progress. The Teacher can access information only of the learners belonging to his/her group, not to the information of other learners enrolled in the same course(s) – GDPR compliance.

Learners' management includes:

- Learners' registration status (visibility to whether the learner is registered to the platform or not)
- Course progress in terms of consumption: course started, in progress, completed
- Assessment results: successful completion, score
- Possibility of exporting data
- Due date management
- Follow up to learners.

EIT Manufacturing is ensure whether it would be better to implement this function in the CMS or in the LMS module. The supplier is asked to suggest the optimal solution based on the needs and the standard functionalities available in each module and their respective plugins.

## Reporting

It must be possible to monitor the above-mentioned purchasing processes through data and analysis. In other terms, the stakeholders involved should have access to reports and dashboards (view and edit) to be informed about the perimeter of their respective interest.

Reports and export functions cover the following aspects:

- catalogue and metadata
- user database
- courses status (to be started, in progress, completed)
- licences
- courses consumption in relation to licences.

Teacher should also be able to monitor their learners' experience, for example, in terms of courses progress. Particularly, once the teacher has assigned a specific course to a set of learners (the classroom), he should be able to monitor the learners' progress in terms of course consumption and results.

EIT Manufacturing recognizes to the owner(s) of some types of courses a percentage of the revenue related to their purchasing. The reimbursement will be managed out of Skills.move2.0, but the platform must provide data and calculations to support the process (this mechanism is called revenue sharing). Therefore, starting from courses' metadata, orders and payment processes, a report on revenue sharing is designed.

## Courses recommendation

Courses are recommended to the learners based on their purchasing and consumption behaviours. The relations rules can be designed or defined based on metadata characterizing the courses themselves.

## Certificate

Once a learner completes a course, he receives a Certificate of completion generated by the solution. The certificate is set at course level by the author(s) and it's based on one of the templates available. The template retrieves information from the course metadata and the learner's account to fill in its dynamic fields (e.g., course title, course description, authors' info, logo and learner name and surname).

The annex 6 "Certificate template" illustrates some of the templates currently available and the Handbook (Annex 7) provides an understanding of how this functionality is currently implemented in Skills.move.

EIT Manufacturing is ensure whether it would be better to implement this function in the CMS or in the LMS module. The supplier is asked to suggest the optimal solution based on the needs and the standard functionalities available in each module and their respective plugins.

## Feedback

The learner is asked to fill in a customer satisfaction survey after the completion of a course. The learner receives a follow up after a certain period, in case he has not provided the feedback. The feedback is shared with EIT Manufacturing, not published on the platform.

Additionally, especially in case this is a standard function, EIT Manufacturing is also considering to collect "quick feedback" with pop-up requests to users.

EIT Manufacturing is ensure whether it would be better to implement this function in the CMS or in the LMS module. The supplier is asked to suggest the optimal solution based on the needs and the standard functionalities available in each module and their respective plugins.

## 2.2.2 LMS module

The LMS serves as the main module for managing the digital (learning) courses, which may be included in the aforementioned catalogue.

The Digital Courses can be:

1. Nuggets: self-contained learning units, consumable as stand-alone courses
2. Learning Path (LPs): aggregation of existing nuggets.

The whole solution must be envisioned and developed taking in mind this core aspect of the EIT Manufacturing offering that includes both single courses (nuggets) and pathways.

Comments on the LMS module should be included in the section 3 of the “Annex 2 – proposal template”.

### Digital courses creation

EIT Manufacturing Digital Courses are of 2 types:

- Nuggets: consistent learning units, composed by different content types and interactive elements, characterized by metadata. Can be consumed as a course by learners or be part of a Learning Path. They are offered for free.
- Learning Paths (LPs): aggregation of nuggets, characterized by metadata.

Nuggets and LPs are created by authorized groups of users (authors) in proper and segregated authoring spaces.

An important aspect of the EIT Manufacturing’s operations is the distinction between “Organization” and “Consortium”. Companies within EIT Manufacturing can access Skills.move2.0 as users of an individual Organization (author, teacher and learners) or as part of a Consortium. A Consortium is governed by more than one Organization, and all the organizations within a Consortium can create nuggets and LPs while accessing the same authoring space. This means that a specific set of authors cooperate in the creation of learning content and therefore can view the in-progress nuggets/LPs that are not yet published, and, can contribute to their creation when needed.

Is worth noting that one author can belong to one or more consortia.

In the creation process of the LPs, authors can aggregate nuggets developed within their respective consortia (also if the nuggets are still in progress) or approved nuggets developed by other consortia.

All authors can access and copy a nugget template which they must use as the basis for the creation of new nuggets. The annex 7 “Handbook for authors” reports the guideline on how to effectively copy and use the template in Skills.move.

### **Digital courses metadata and status**

The authors, during the content creation and review phases, define and set metadata on nuggets and LPs. Nuggets and LPs are characterized by a status that tracks the progress of the quality check and impacts the content visibility, both to authors of other consortia and on the catalogue.

This reflects the behaviour of the current solution that can be adapted in case the supplier proposes valuable alternatives.

The metadata structure of the DC is integrated with the metadata mentioned in the paragraph 2.2. In particular, this list is a part of the whole metadata table.

Part of the metadata is displayed in the catalogue as information for each single course (e.g., target, duration, learning outcomes). It drives the search and filtering from the catalogue, as well reporting.

### **Digital courses consumption**

The course consumption is triggered by the enrolment of a learner in a specific course, nugget or LP. The learner is enrolled because:

- He chooses to enrol in a free course
- He buys a course
- He was assigned, by a teacher, to a course.

Information about the progress is transmitted to the CMS (my courses page). During the development of the project, it will be evaluated which information to convey. This could be:

- To be started
- In progress
- Completed
- Assessment results

Once learners are enrolled in an LP, they are guided through its consumption by a navigation bar/menu that lists the nuggets included on it, shows their progress and allows them to navigate among the nuggets they have already consumed.

### **Assessment**

The assessment is an activity having the aim of assessing whether the learner has achieved the expected results.

The results of the assessment are based on:

- Results of a quiz activity
- Score assigned by teacher following the evaluation of an assignment activity
- Score uploaded by a teacher
- Positive result of an exam.

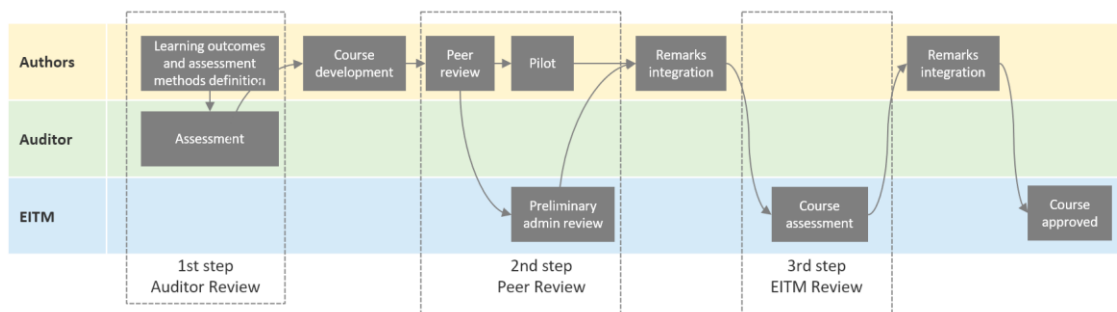
EIT Manufacturing is considering the option of enabling “Jupiter notebook” to evaluate coding capabilities. It would be appreciated if the supplier may enrich the proposal with alternative tools that improve the effectiveness of the competencies’ assessment.

## Quality check

All content developed must go through the Quality Check (QC) process and must be approved before being published or accessible by people out of its respective consortium.

The QC is composed by 3 mandatory steps and an optional one which are represented in the picture below:

- Mandatory:
  - o Auditor review
  - o Peer review
  - o EIT Manufacturing review
- Optional
  - o Pilot training.



More in detail:

1. Authors initialize the courses by specifying title and some metadata - LPs
2. Auditor checks, comments and/or approves/rejects
3. Authors create content by adding activities to the nuggets and nuggets to the LP.  
Steps 2 and 3 can be run in parallel.
4. The author asks a peer to review the content. Otherwise, the author marks the content as “ready to be peer reviewed”
5. The peer checks, comments and/or approves/rejects
6. The authors integrate the comments, if needed
7. Content is assigned to a list of learners who consume the course and, in case, provides some comments which are integrated by the authors
8. Authors marks the content as “ready for admin review”
9. EITM checks, comments and/or approves/rejects
10. Authors integrate the remarks and mark the content as completed
11. EITM approves the content.

Currently, the course status is manually changed authorized users, with the system tracking who made the changes and when changes.

During the development of the project, and in particular the blueprint phase, the teams will decide how to implement the process and whether to include workflows, based on available standard/plugin functions.

The Annex 7 “Handbook for Authors” illustrates also how the process is currently implemented in Skills.move, although the first step (Auditor review) is a change of 2023.

## Reporting

As for the paragraph about reporting in the CMS module, it must be possible to monitor content creation and consumption processes through data and analysis.

The most used reports are:

- Nuggets/LPs created (list and respective metadata)
- Nuggets/LPs progress and consumption
- Relation LPs – nuggets relationship
- Teachers – learners relationship (all what is linked to licences functions in the current version of Skills.move)
- ...

The reports are dynamic and can be configured by EIT Manufacturing who, starting from off-the-shelf report, can add/delete parameters and filters.

Learning data works as an input for the reporting, and can be downloaded so that EIT Manufacturing can perform autonomous analysis (e.g. in .csv or .xlsx formats).

It's important to take into consideration that also reporting, as the whole module, must take into account the existence of 2 main learning objects: nuggets and learning paths.

## Social Learning

The solution includes social learning functions that can enhance the learning experience and its effectiveness. EIT Manufacturing is willing to introduce features such as polls, forums and learning circles. Considering the supplier's experience in the market, it is asked to suggest the best social learning features to be enabled.

## Gamification

The solution includes gamification functions that can enhance the learning experience and its effectiveness. EIT Manufacturing is willing to introduce features as badges, challenges, points system and dashboard with progress tracking.

As well, considering the supplier's experience in the market, it is asked to suggest what are the best features to be enabled in terms of gamification.

## 2.3 Other requirements

Comments on "Other requirements" should be included in the section 4 of the "Annex 2 – proposal template".

### Look and Feel

The look and feel of Skills.move2.0 is customised with brand themes and colours provided by EIT Manufacturing. EIT Manufacturing provides the graphic material (logos and brandbook).

The supplier must comment this request in the section 1.2 of the "Annex 3 – proposal template".

It would be appreciated if the supplier includes in the proposal examples of how the catalogue, "my courses" page and other relevant portion of the solution may look like.

### **Responsiveness and mobile**

Skills.move2.0 is easily accessible and responsive, also on mobile devices. This can be achieved through a mobile-friendly and responsive interface or by providing a dedicated mobile application. The decision to develop a mobile app will be evaluate by EIT Manufacturing.

Indeed Skills.move2.0 allows students and workers to get fast access to the latest manufacturing knowledge and supports learning as and when needed without having to enrol in a long-term program.

Responsiveness is as well intended as the capability of the solution to correctly display content independently from the dimension of the desktop application, displaying the whole video frame and image and adapting the size of the text regardless of the type of multimedia.

### **Operations**

Key workflows need to be simple and fit for purpose both for users and the EIT Manufacturing administrator.

The user experience must be user friendly.

The ease of use and breadth of administrative tools is also important. This should include access to reporting and dashboards (view and edit), ability to assign permission to single/group of users. The administrator is able to create simple workflows, set notifications for the processes above illustrated (e.g., account management, enrolment in a course, certificate achievement, order and purchase processes, licences), create and customize reports.

The solution tracks versioning of the data and allows historic versioning of queries and reports.

### **Support material**

EIT Manufacturing requests to deliver Support Material useful to the user in running and using Skills.move2.0.

In particular:

- Technical Report containing detailed information about the performed configuration. Moreover, the supplier dedicates an annex to each customization developed and integrated
- User guidelines supporting users in operating the system, a guideline for each user personas (role).

### **Tunnelling**

The LMS can be integrated with external learning applications and, as well, with third parties LMSs.

The integration allow bidirectional communication: from LMS to external application (e.g. to access) and vice-versa (e.g. to track completion of the task).

With this purpose LTI integration is enabled in the solution and can be configured to allow remote users on a different site to access selected courses and activities on Skills.move2.0.

The supplier is asked for suggesting other options for integrating third parties LMS, if any.

### **Content migration**

EIT Manufacturing is currently operating on Skills.move, Moodle based LMS solution. In the past 3 years authors have developed nuggets and LPs and learners consumed the content.

The supplier is asked to interact with the current platform provider to export data from the current solution and, then to import it to the new one.

Data must include:



- Nuggets and LPs created, and respective metadata
- Logs, at least about the nuggets and LPs status
- User databases and assigned roles
- Consortia and people included in them
- Nuggets and LPs consumption/completion information.

Around 3000 nuggets and 550 LPs have been developed so far.

While developing Skills.move 2.0, EIT Manufacturing partners will keep creating nuggets and LPs in the old platform (roughly 750 nuggets and 120 LPs); therefore, a second import wave needs to be foreseen:

- First wave: content developed in 2020, 2021 and 2022
- Second wave: content developed in 2023.

Please note that the nuggets must be migrated as content composed by more than one Moodle activity (if it's the case), not as SCORM packages.

### Number of users and hosting

The volume of users is expected to continue to grow over time, as for the following table. The supplier is asked for quoting the hosting service coherently with the foreseen volume of users. At the same time the chance of crossing the threshold must be considered.

Year	Number of users
2023	7.500
2024	12.000
2025	18.000
2026	25.000

Currently Skills.move counts with about 5500 users; the number is expected to grow to 7500 by end of 2023.

### Plugins adoption

The usage of plug-in may be an option, both for adding functionalities to the two core modules of the solution (CMS and LMS) and for enabling their integration.

The supplier is asked to propose the most adequate plugins and the functions for which they are suggested.

As well, the supplier should highlight pros and cons of adopting such plugins.

EIT Manufacturing must approve their adoption.

### Subcontractors

The supplier, as main contractor, is allowed to subcontract part of the activity, but only after conclusion of the contract and upon written approval by EIT Manufacturing.

With this purpose, the contractor should provide evidence of:

- Motivation of the proposal
- Perimeter of the subcontracted activity
- Legal, financial and technical details about the subcontractor
  - o presentation of the subcontractor
  - o reasons about its selection
  - o experience of the team working on the solution.

The subcontractor might be invited to introduce itself to EIT Manufacturing in a joint call between the three parties.

The contractor will keep the Project Management of the whole project development.

Nevertheless, the contractor remains the unique accountable and responsible entity for the provision and operation of the solution.

### **Development, Quality and Production environments**

EIT Manufacturing is proposing to develop and operate the solution using at least two different environments: one for development and, a second as production. The preferred option would also include a quality environment.

The supplier should clarify his choice and specify the related costs for the 2 options in case there's a difference.

### **Security**

To facilitate adoption and build trust among the community, security will be of utmost importance. The Platform and its data need to be hosted in Europe and deployed on the cloud. The supplier is expected to provide certificates and/or other guarantees regarding adherence to security best-practices, including:

- Data security certification, i.e. SecNumCloud or similar
- Server hosting security measures
- Overview of latest penetration testing results
- Evidence of compliance with GDPR (and where relevant, other privacy/spam laws) and server located in Europe
- Load Balancing, DDoS protection , Web application firewall, SSL / TLS encryption , API Gateway protection at Hosting or website level.

The supplier will be expected to provide continued, timely troubleshooting support to EIT Manufacturing throughout the contract, and to provide the benefit of frequent updates and maintenance to improve platform functionality and uphold high security standards.

A solution back up process should be in place (data, technical configuration and parameters).

Please include your approach on this topic in the proper subsection of the section 4 of Proposal template

Finally, the supplier is asked for detailing the Service Level Agreement and mitigation actions foreseen in case of data breach.

### **Way Out Option**

Transferring the Skills.move 2.0 content, data configuration and custom code to another learning platform must be made possible, without a complicated hand-over, during or after the contracted period (different platform and different services provider). As well, changing the services provider must be feasible (same platform but with different services provider).

The supplier must be explicit in the proposal if he can meet the requirement, and if any cost needs to be considered. The proposal should detail if the way out can be applied to only one of the two modules included in the solution.

An example of way-out transition (phases, effort and assumptions) would be appreciated.

### **Relevant experience**

Tenderers are expected to be able to demonstrate relevant experience in relation to the above requirements (similar projects), and to share the details of one current and two former customers that EIT Manufacturing can contact for reference.

Additionally, the supplier is asked to provide details about the team who will work on the project by including role in the project team and their resumes.

### **Other developments**

EIT Manufacturing is considering including features that enable and enhance hands-on learning experience, for instance with virtual and augmented reality applications and IoT connections.

The supplier is asked for illustrating his experience and suggestions on this.

### **Critical and not covered requirements**

EIT Manufacturing asks the supplier for highlighting eventual critical requirements that may make the solution inefficient and/or ineffective.

A cost-benefit analysis would be appreciated: the supplier can propose alternative options to the requirements listed in this RfP that, because of the standard functions available in the 2 modules and respective plug-ins, would make the development and maintenance of the solution expensive and not effective.

Additionally, the supplier shall explicit whether any of the requirements are partially or not covered by the suggested solution.

## 3. Deliverables

Comments on “Deliverables” should be included in the section 5 of the “Annex 2 – proposal template”.

### 3.1 Perimeter

EIT Manufacturing requires the supplier to include in the supply:

- Purchase/provision of software licences (if any)
- Requirement analysis and Blueprint (in collaboration with EIT Manufacturing, during the execution of the project)
- Solution configuration
- Solution customization, if needed
- Customization of look&feel
- Training to administrators
- Testing
- Hosting
- Support to admin

- Support to users
- Support material
- Maintenance, including of eventual integrated plug-in

## 3.2 Project timeframe

The whole solution is expected to be up and running no later than October 31<sup>st</sup>, 2023.  
The supplier is asked for detailing a project timeframe in proper section of the Proposal template.

## 3.3 Test

EIT Manufacturing intends to test the performed configuration and developments by performing:

1. Operational and non-functional acceptance tests
  - People involved: EIT Manufacturing, supplier
  - Test: performance, usability, reliability
2. User Acceptance test: - People involved: EIT Manufacturing, user, supplier
  - People: EIT Manufacturing, supplier
  - Test: based on the blue print document and use cases identified during the analysis
3. Beta-test: EIT Manufacturing wants to open Skills.move2.0 to some champion users to test the overall operations before officially launching the solution

# 4. Submission of proposal

## 4.1 Timeline

The indicative timeline for the request for proposals is as follows:

Activity	Responsible	Due date
RFP opening	EIT Manufacturing	March 30 <sup>th</sup> , 2023
Offer submissions	Suppliers	April 24 <sup>th</sup> , 2023
Notification of award	EIT Manufacturing	May 11 <sup>th</sup> , 2023
Standstill period to receive complaints	Suppliers	May 16 <sup>rd</sup> , 2023

Contract signature	EIT Manufacturing & selected supplier	May 22 <sup>nd</sup> , 2023
Project start (Kick off meeting)	EIT Manufacturing & selected supplier	May 23 <sup>rd</sup> , 2023

All binding documentation and information must be shared by email.

## 4.2 Proposal structure

The supplier should fill in the Proposal template in Annex 2.

In addition, he can provide other documentation as support material.

Regarding the cost structure, even if a first order will cover services delivered only within the current year, the supplier is asked to detail in the template also recurring costs related to the upcoming years (2024, 2025 and 2026), as EIT Manufacturing intends to keep running the solution.

# 5. Evaluation Criteria and Award Notification

Timely received proposals submitted by the tenderers will be examined, evaluated, and compared in accordance with the following criteria and the contract shall be awarded to the highest ranked tenderer. The decision will be made according to the “Best Value for Money” principle.

- a. Technical solution (50%)
  - a. Coverage of the requirements
  - b. Proposed solution, fit for purpose, interoperability and scalability
  - c. Project plan and resources
  - d. UX
- b. Contractor, subcontractor(s) and references (20%)
  - a. Presentation<sup>3</sup> of the provider
  - b. Relevance and strength of references
  - c. Resumes of the teams
- c. Costs (30%)
  - a. Solution configuration and customization
  - b. Recurring costs
  - c. Cost/day

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<sup>3</sup> The presentation should include size, presence/location, history, partnerships, competencies, type of delivered services.

An Evaluation Committee of at least 3 people will be established. Each bid will be evaluated and ranked according to the criteria above.

The compliance with the principles of transparency, non-discrimination, equal treatment, and absence of conflict of interest will be ensured.

The successful and unsuccessful tenderers will be informed in writing (via email) about the result of the award procedure. In case the winning tenderer is unable to enter the contract, EIT Manufacturing may decide to contract the supplier receiving the second highest ranking.

Proposals must be submitted by e-mail by April 24<sup>th</sup>. All proposals received after the deadline will be rejected.

In duly justified cases, however, no later than 5 calendar days before the original deadline, the submission deadline can be extended.

Upon request from the tenderer concerned, EIT Manufacturing will as quickly as possible, and in any event within 30 calendar days from receipt of a written request, will provide further details if possible, on the reasons why a tenderer was found unsuccessful or although the tender submitted was admissible, the tenderer was not awarded the tender.

Information referred to above may be withheld where the release of such information would be contrary to the public interest, would prejudice the legitimate commercial interests of an economic operator, or might prejudice fair competition between economic operators.

Should there be a suspicion that the provider will not be able to perform according to the price offered, EIT Manufacturing has the right to ask for explanations and may reject the tender where the evidence supplied does not satisfactorily account for the low level of price or cost proposed.

## 5.1 Complaint procedure

Tenderers believing that they have been harmed by an error or irregularity during the award process may file a complaint. Appeals shall be addressed to EIT Manufacturing only via the following email address [paola.fantini@eitmanufacturing.eu](mailto:paola.fantini@eitmanufacturing.eu). Object of the email "Skills.move2.0 bid - Complaint file - [name of your company]". The tenderers have 5 days to file their complaints from the date of receipt of notification of the results.

In your application to EIT Manufacturing the complainant shall explain what procedural aspects they consider having been violated along with any recommendations or remarks. Such claims need to be supported with data and facts and relevant documentation. An appeal whose sole purpose is to obtain a second evaluation for no reason other than that the complainant disagrees with the final award decision is to be rejected.

## 5.2 Clarifications

In case of obvious or perceived errors or omissions in the RfP, Tenderers can request additional information. Please note the following:

- Clarification requests should be sent to the following email: linda.ferro@eitmanufacturing.eu
- The email should include a subject header in the following format: “Skills.move2.0 bid - Request for Clarification - [name of your company]”
- For transparency, the tenderers will receive the answers to the questions in one Note of Information which will be provided to all tenderers simultaneously. There will not be an individual answer to questions. The name of the tenderer requesting clarification will not be disclosed to competing parties
- In case of no clarification provided, the tenderer will design the solution on the basis of his own assumptions that have to be detailed in the proposal.

The requests as well as the answers are to be submitted written by e-mail. Where information or documentation to be submitted by tenderers is incomplete or erroneous or where specific documents are missing, EIT Manufacturing staff may request the party concerned to submit, supplement, clarify or complete the relevant information or documentation.

For transparency, the tenderers will receive the answers to the questions in one Note of Information which will be provided to all tenderers simultaneously. There will not be an individual answer to questions. The name of the tenderer requesting clarification will not be disclosed to competing parties

## 5.3 Negotiations

Negotiations can be held in the following cases:

- if it is identified that the scope of services issued by EIT Manufacturing is not detailed enough, incomplete or some areas are lacking crucial information to complete the procedure for direct awards;
- if EIT Manufacturing has the intention to reduce the offered prices to find the best value for money;
- if all submitted prices are above the planned budget and it is everyone’s interest to finish the procedure with success – in that case, price negotiation can take place. During a price negotiation, all tenderers are called to lower their prices by the same deadline in a written form;

EIT Manufacturing can organize as many rounds of negotiation as it is needed during the procedure in order to reach the highest quality of proposals and the best price.

Whenever possible, the negotiations should be carried out in writing, however, in special cases, video conference or even live negotiation can be organized. EIT Manufacturing also reserves the right to invite the tenderers to an individual meeting before the final award of contract in order to clarify details and ambiguities.

Bid preparation costs are not reimbursable and must be borne by the tenderers.

EIT Manufacturing owns all bids received in this RFP. Proprietary information of vendors in the bids will be kept strictly confidential. The offers as well as the contract may be submitted for audits.

## 5.4 Contract

The final award does not yet constitute the Contract. The Contract will be concluded at the time of signature by the Supplier and EIT Manufacturing. The winning supplier will be sent the contract to be signed (indicating the deadline by which the signed contract should be returned to EIT Manufacturing).

The invoicing will be based on a mutually agreed schedule; it will be detailed in the contract. The contract that will be awarded will have a maximum duration of 4 years (2023 for setting up the solution and 2024, 2025 and 2026 of operations).

The awarded supplier will be requested to sign Standard Contractual Clauses (SCC) if no other GDPR compliant safeguards exist, and the supplier is located in a country for which the EU commission has not issued an adequacy decision.

## 5.5 Cancellation of the proposal procedure

In the event of cancellation of the proposal procedure, EIT Manufacturing will notify tenderers of the cancellation. In no event shall EIT Manufacturing 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 Manufacturing has been advised of the possibility of damages.

The tenderer 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'). S/he should inform the EIT Manufacturing team immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

The supplier cannot be a EIT Manufacturing Partner or Activity Partner. Any bid from such an economic operator will be rejected.

Tenderers will be excluded if:

- a) they are being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations; they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;



- b) they have been guilty of grave professional misconduct proven by any means which the EIT Manufacturing can justify;
- c) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or any other country of the EU;
- d) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the EU' financial interests;
- e) following a procurement procedure or grant award procedure financed by the EU budget, they have been declared in serious breach of contract for failure to comply with their contractual obligations.

The tenderers must not be in a situation of a conflict of interest, and they have sufficient economic and financial capacity, technical and professional capacity and legal and regulatory capacity to perform the requested services. A declaration of honour regarding the above shall be signed by the tenderer. Additional evidence or declarations might be requested by the contracting authority.

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