

Request for proposals

Enquiry management and conversion services for educational programmes.

EIT InnoEnergy

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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.innoenergy.com/about-innoenergy/>

3. Scope of work

Within its education portfolio, EIT InnoEnergy offers degrees and non-degree programmes. The flagship initiative is the Master School. With seven two-year programmes, the Master School enables young professionals to add to their technical knowledge, develop creative engineering skills, and acquire the necessary understanding of business, entrepreneurial and innovation management. EIT InnoEnergy programmes take place at some of the best technical universities and business schools located in ten European countries. EIT InnoEnergy welcomes annually between 200-300 new students to its current face-to-face master's programmes.

As EIT InnoEnergy strives for financial sustainability, it has set an increasing target of fee-paying students enrolled in its master's programmes every year. This started in 2017 with 30 fee-paying students and it is currently at close to 200 fee-paying students for intake 2021. Currently, fee-paying students are divided between full-fee payers (18,000 EUR per year) and partial-fee payers (13,000 EUR, 12,000 EUR, 10,000 EUR, 6,000 EUR or 5,000 EUR per year) EIT InnoEnergy aims at continuing this growth while also increasing the tuitions associated to its programmes

The education portfolio also includes new initiatives that are developed based on market opportunities. These may include short courses, customized programmes and/or online degrees. The recruitment targets of these are assessed on a case-by-case basis.

We are looking for services from a company focused on enquiry management and conversion services (leads, applicants and offer holders) to increase the number of enrolled students in EIT InnoEnergy Master School and other programmes within our educational portfolio.

EIT InnoEnergy already currently engages in multiple marketing activities to capture leads/prospects and, through automated processes and events, nurture those towards application/enrolment. The selected supplier is expected to support this process by engaging in inbound and outbound one-to-one conversion activities such as phone call, chat, instant messaging platforms, social media, SMS, e-mail marketing, etc.

The selected supplier is expected to continuously showcase progress, report on the return on investment of its activities, share the effectiveness of the different nurturing channels as well as integrate with current EIT InnoEnergy marketing, customer relations management and application platforms.

3.1. General objectives:

- Increase the number of one-to-one interactions with leads and applicants through various communication channels
- Provide leads and applicants with personalized advice on their enrollment at EIT InnoEnergy programmes
- Measure ROI and efficacy of lead generation and marketing channels currently used by EIT InnoEnergy
- Obtain useful data and insights through direct contact with potential students for future recruitment strategies
- Increase the conversion rate from lead to applicant
- Increase the conversion rate from applicant and offer holder to enrolled student
- Increase volume of enrolments and associated income

EIT InnoEnergy intends to engage in a contractual agreement for the above mentioned services between January 2022 and January 2023 with the possibility to extend the contract with the winner of this tender for one additional period of 1 year provided the budget allows, continues need for the services, and satisfactory collaboration. This provides EIT InnoEnergy the option to follow the Direct Award procedure to extend the contract but not the obligation to as it does not bind EIT InnoEnergy in any way to follow the procedure.

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)
Sending out RFP invitations to the potential suppliers	16 November 2021
Deadline for requesting clarification from EIT InnoEnergy	23 November 2021

Deadline for submitting proposals	26 November 2021
Intended date of notification of award	03 December 2021
Intended date of contract signature	10 December 2021

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

Contact name: for the attention of Mr. Javier Arias

E-mail: javier.arias@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 *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 counterproposals, 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 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.

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, EIT InnoEnergy could arrange a clarification session which will be communicated to the tenderers.

Contact name: for the attention of Mr. Javier Arias

E-mail: javier.arias@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.

Technical criteria	Points
Proven experience in lead, applicant and offer holder conversion in higher education context leading to increased revenue for the institutions.	20
Proven ability to connect with leads, applicants and offer holders at the different stages of their decision-making process and identify the value (return on investment) of each stage and interaction.	15
Proven success in multichannel enquiry management including country specific platforms, i.e. phone calls, instant messaging, live chat, e-mail marketing, WeChat, etc	10
Ability to integrate processes with EIT InnoEnergy's platforms and systems such as HubSpot, lead scoring mechanism, applications portal, etc.	10
Activity management tools (providing dashboards, data, reporting, insights, and benchmarking)	10
Availability of company liability insurance and proof of GDPR compliance	5
	70
Financial criteria	
Lowest offered expert unit price shall receive the highest score, other shall be calculated in relation to that in linear equation	30
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 of receipt of the contract from EIT InnoEnergy after the standstill period, 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.

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 5 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.