

Request for proposals

Market Research Services

EIT InnoEnergy

1. Table of contents

1.	Table of contents	2
2.	Overview of EIT InnoEnergy	3
3.	Scope of work	3
4.	Proposal Process	4
4.1.	<i>Participation</i>	4
4.2.	<i>Submission of proposal</i>	4
4.3.	<i>Validity of the proposals</i>	5
4.4.	<i>Requests for additional information or clarification</i>	5
4.5.	<i>Costs for preparing proposals</i>	5
4.6.	<i>Ownership of the proposals</i>	5
4.7.	<i>Clarification related to the submitted proposals</i>	5
4.8.	<i>Negotiation about the submitted proposal</i>	6
4.9.	<i>Evaluation of proposals</i>	6
4.10.	<i>Signature of contract(s)</i>	6
4.11.	<i>Cancellation of the proposal procedure</i>	7
4.12.	<i>Appeals/complaints</i>	7
4.13.	<i>Ethics clauses / Corruptive practices</i>	7
4.14.	<i>Many journeys. One welcome.</i>	7
4.15.	<i>Annexes</i>	8

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 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**

The InnoEnergy Skills Institute (IESI) is a newly established training and skilling business line to support the transition of European and North American industry towards an electrified and green future. IESI has an existing portfolio of battery training programmes, online and in blended format. The programmes have been designed for all EQF levels and are aimed at supporting high technical and engineering skilling for the targeted audiences. The programmes cover topics on the entire battery value chain; from raw materials for battery production to battery and electricity basics, from battery technologies and battery system components to different battery-based applications such as mobility, grid support, and electrification of industry, from technological innovations to new business models supporting the energy transition.

Framing the Market Research Services EIT InnoEnergy is looking for in this RFP

As a company we are entering into a strategic expansion in the EU and North American regions within the solar (PV), green hydrogen, and battery sectors, and we recognize the critical importance of informed decision-making for our success. We are actively seeking the specialised expertise and support of a reputable market research agency to help us make informed decisions that will help drive the success of this expansion.

Our objective is clear: to conduct thorough and insightful research that not only ensures the success of our upcoming product launches but also refines the positioning of our existing offerings. This RFP serves as a guide, outlining the key areas of focus that we believe are crucial for the market research agency to explore.

By engaging in comprehensive research, we aim to gain actionable insights into market dynamics, emerging trends, and customer preferences within the solar, green hydrogen, and battery sectors. The findings of this study will be crucial in shaping our strategic initiatives, ensuring that our products align seamlessly with market demands and anticipate future shifts.

We envision a collaborative partnership with the selected market research agency, where together, we aim to discover new opportunities, mitigate potential challenges, and position our company as a leader in the sustainable energy learning landscape.

Market Research services are required for all the following subject areas in both the EU and NA market regions:

- Battery Energy Storage
- Photovoltaics/Solar Energy
- Green Hydrogen

Service Description: Market Research Services

Please Note: Throughout the scope of the research and analysis, it is important to maintain a dual perspective, considering the distinct viewpoints of both buyers (paying customers) and end-users (learners). This approach ensures that our learning solutions are developed to meet the needs and expectations of both stakeholder groups.

By understanding the priorities and preferences of our paying customers, we can align our product offering with their strategic goals, ensuring that our learning solutions deliver tangible value and return on investment. Simultaneously, acknowledging the unique requirements and experiences of the end-users guarantees the learning solutions are engaging, effective, and cater to the specific learning needs of individuals.

This dual focus allows us to strike a balance that appeals to the decision-makers who invest in our learning solutions and with the learners who engage with the content daily. This commitment to a dual perspective position allows us to not only meet industry standards but to also set a benchmark for excellence in educational offerings.

Given the comprehensive scope outlined in the main RFP document, we have chosen to narrow down the focus for the purpose of this RFP and have scoped an assignment open to all the tenderers (see Annex 3). This assignment can also serve as the first project for the winner of the RFP. We will only evaluate submissions based on scopes 3.1 and 3.2, although we may later request work from the tender winners that include scopes 3.3 and 3.4.

3.1 Market Analysis Scope:

In the market analysis approach, our goal is to comprehend both the present situation and anticipate future trends. The market analysis should consist of (but is not limited to) the outlined services:

- **Competitive Landscape Assessment:** Analyze current competitors to understand their market share and pricing trends.

- **Identification of Market Drivers and Trends:** Uncover the key market drivers influencing our industry. Understanding these factors will bolster our market position and enable us to capitalize on emerging opportunities.
- **Exploration of Growth Areas:** Identify potential growth opportunities within the market by analyzing trends, consumer preferences, and technological advancements.

3.2 Customer Segmentation Scope:

Our goal is to understand our audience thoroughly using a comprehensive customer segmentation approach. We don't just categorize them; we aim to fully grasp their individual needs. The customer segmentation services should consist of (but is not limited to) the outlined services:

- **Target Audience Profiling:** Conduct an analysis to identify and segment the target audience, examining demographics, behaviors, preferences, and industry-specific needs.
- **Market Understanding:** Conduct an analysis to explore the intricacies of the market and understand diverse needs, including customer expectations, decision-making drivers, pain points, and evolving preferences.
- **Identification of Market Variances:** Conduct an analysis to identify and highlight variances within the market, recognizing potential sub-segments or niche markets.

3.3 Persona Profile Development Scope:

Our goal is to develop Persona profiles for number of end-users (learners) and buying customers (businesses) that delve deeper than surface-level requirements, uncovering the motivations and challenges driving customer behavior. The persona profile development services can consist of (but is not limited to) the outlined services:

- **Motivations Driving Adoption:** Identify what motivates customers to adopt our products, revealing the key factors influencing their decision-making.
- **Challenges:** Explore and analyze the obstacles potential customers encounter in adopting our products or services. Identify barriers that could hinder adoption.
- **Pain Points:** Highlight pain points and challenges faced by each persona.
- **Preferences Mapping:** Map out the preferences of each persona, including their likes, dislikes, and nuanced choices.
- **Creation of Persona Profiles:** Develop detailed persona profiles representing typical customers within our target audience (for both end-user and buying customer).

3.4 Customer Journey Mapping Scope:

Our goal with detailed customer journey mapping is to go beyond guiding customers from awareness to purchase. We aim to create an immersive and enjoyable experience that extends beyond the transaction. The customer journey services should consist of (but is not limited to) the outlined services:

- **Customer Journey Mapping:** Provide a comprehensive map of the customer journey, guiding us from awareness through consideration, decision-making, and beyond the purchase.
- **Identification of Key Touchpoints:** Identify and analyze key touchpoints throughout the customer journey, from initial encounter to post-purchase engagement.
- **Examination of Decision-Making Phases:** Break down the customer journey into distinct decision-making phases, such as awareness, consideration, and conversion.
- **Integration of Post-Purchase Experience:** Extend the customer journey map beyond the purchase to include post-purchase experiences.

More than one vendor may be selected.

Contract duration and terms

The contract's duration is 24 months. In case the budget coverage for future support for the services presently tendered, plus the continuing need for the services provided by the tenderer, EIT InnoEnergy intends to extend the contract with the winner/s of the present supplier selection process with another 24 months. The contract extension will be done through a direct award procedure. This extension is subject to financial coverage and high-quality performance of the contractor and continuous need for the services, but this does not bind EIT InnoEnergy to carry out an extension.

Operational Execution

Work will be executed on a project-by-project basis. Clear expectations, scope of work and milestones (with a system to track these) will be agreed to at the beginning of each project. The nature of the operational execution (e.g., cadence of regular meetings) will vary depending on the size of the individual projects. EIT InnoEnergy cannot commit to a minimum volume of work, neither in time spent on the services, nor in compensation paid.

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. 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.

4.2. *Submission of proposal*

	DATE (Calendar dates)
RFP website publication	8 February 2024
Deadline for requesting clarification from EIT InnoEnergy	23 February 2024
Deadline for submitting proposals	08 March 2024
Intended date of notification of award	15 March 2024
Intended date of contract signature	29 March 2024

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

Contact name: for the attention of Mrs. Katja Trued

E-mail: katja.trued@innoenergy.com

The proposal shall contain:

- **the technical response should include the information indicated in Annex 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. **Please structure your financial offer in line with the requirements in Annex 4.**
- **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 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 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 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 the 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 Mrs. Katja Trued

E-mail: katja.trued@innoenergy.com

EIT InnoEnergy has no obligation to provide clarification.

4.5. *Costs for preparing proposals*

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

4.6. *Ownership of the proposals*

EIT InnoEnergy retains ownership of all proposals received under this tendering procedure. Proprietary information identified as such, which is submitted by the 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 award criteria below. The award criteria will be examined in accordance with the requested service indicated in Section 3 of the document and submissions must comply with requirements laid out in Annexes 3 and 4.

Criteria (provide information as outlined in Annexes 3 and 4)	Maximum Points
1. Comprehensiveness of the methodology outline and approach for the requirements stated in the Annex 3	35
2. Demonstrated evidence of success in market analysis and customer segmentation (in similar industries where possible)	30
3. Project implementation (management) and processes proposed to manage projects assigned to you. This includes project management and interaction with EIT InnoEnergy for planning, delivery, quality feedback, proposed timeline, follow up and reporting.	10
4. Insurance coverage.	5
Total technical score:	80
5. Price of services	20
Total financial score:	20
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. The background for this is that such desired changes need to be considered 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 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 10 working 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. ***Many journeys. One welcome.***

Diversity, inclusion, and equality of opportunity are core EIT InnoEnergy values. We are committed to extending the same warm welcome to everyone, whatever their personal journey. We strive to ensure every voice is heard.

We value the contribution that different viewpoints make to our business of innovation. Having a variety of perspectives at all levels also equips us to meet the needs of the diverse communities we serve.

We extend our commitment across the career cycle. We recruit people from diverse backgrounds—for example, as of 2022, we employed 39 nationalities split 50-50 male-female. We then ensure that every member of our team is involved and valued and receives equal recognition and opportunities for advancement.

In all areas of the employee experience (including recruitment, compensation and career development), and in all dealings with customers and communities, EIT InnoEnergy staff will value merit regardless of age, social status, race, colour or genetic features, disability, ethnic/social origin or national minority membership, gender, gender reassignment, sexual orientation, language, marital or partnership status, political or any other opinion, economic status, religion or spiritual belief.

Although we do not use this as a vendor selection criterion, we are interested in learning from others, and would be happy to receive anything about your Diversity values or policy that you would care to offer.

4.15. ***Annexes***

Annex 1: Tenderers' Declaration form

Annex 2: Draft Contract Template

Annex 3: Technical Proposal Guidelines

Annex 4: Financial requirements