

Request for proposals

**For marketing and social media services for
EIT Health InnoStars e.V.**

09 December 2022

1. Overview of EIT Health InnoStars

The [European Institute of Innovation and Technology](#) (EIT) is an independent EU body with the goal to increase Europe's ability to innovate by nurturing entrepreneurial talent and supporting new ideas. The mission of EIT is to increase Europe's competitiveness, its sustainable economic growth and job creation by promoting and strengthening cooperation among leading business, education and research organisations as well as to power innovation and entrepreneurship in Europe by creating environments for creative and innovative thoughts to thrive. EIT brings together leading organisations from business, education and research to form dynamic cross-border partnerships - EIT Knowledge and Innovation Communities (KICs) – in different areas connected to the most important societal challenges of Europe such as climate change, green energy, digitalization, health, food, sustainable use of raw materials and urban mobility.

[EIT Health](#) is one of the largest healthcare initiatives worldwide, established by EIT as one of its Knowledge and Innovation Community. EIT Health is a network of best-in-class health innovators who deliver solutions to enable European citizens to live longer, healthier lives by promoting innovation. EIT Health leverages the expertise of 150 leading organizations spanning key areas of healthcare, such as pharma, MedTech, payers, research institutions and universities. EIT Health Partnership is divided into 7 nodes. 6 of them are regional innovation hubs defined by the geographical proximity of the Partners. The 7th node, InnoStars includes Partners from emerging European countries where the innovation capacity is still modest or moderate. [EIT Health InnoStars](#) (hereinafter referred to as 'InnoStars') are regional clusters of EIT Health Partners representing industry, academia, and health providers linked to five regions in four countries (Portugal, Hungary, Poland, Italy). Check out our explanatory video to learn more about EIT Health InnoStars [here](#). In the framework of the [EIT Regional Innovation Scheme](#) (RIS) initiative, InnoStars is also actively supporting another 14 regional innovation Hubs (called EIT Health Hubs) in 13 countries across Europe (outside of the EIT Health network) where the development level of the innovation ecosystem is modest or moderate (Estonia, Latvia, Lithuania, Czech Republic, Poland, Slovakia, Hungary, Slovenia, Croatia, Romania, Greece, Italy, Poland and Portugal). The goal of the RIS program is to enhance the innovation capacities of less developed regions by engaging and involving local stakeholders in EIT Health activities and providing tools and supporting services for the development of the local innovation ecosystem.

2. Scope of work

2.1. General objectives

- Increase awareness of InnoStars and EIT Health Regional Innovation Scheme Programme (RIS) in 13 countries within target audiences such as healthcare professionals, students and graduates of medical universities, PhDs and researchers, start-up founders in the healthcare domain, investors, thought leaders, decision-makers, as well as policymakers in healthcare (including showcasing best practices, success stories, opportunities, and benefits);
- Promote InnoStars and EIT Health RIS program among target audiences, spotlight the impact of the EIT Health and EIT Health RIS via success stories, data dashboards, creative multimedia as well as policy papers or similar;
- Promote InnoStars opportunities and EIT Health Hubs' activities to the local communities and stakeholders (including EIT Health Partners and external stakeholders), incl. lead generation, awareness raising, and building loyalty among chosen groups;

- Increase number of talents from InnoStars and RIS regions applying for Start-up Acceleration, Innovation and Education activities – contests, programmes and events organised by EIT Health and within the Regional Innovation Scheme Programme (e.g. start-up competitions, summer schools, local events, trainings and workshops such as Innovation Days) as well as increasing number of organisations (industry, academia, media groups etc.) interested in partnering with EIT Health;
- Increase engagement of the community via different contemporary and creative multi-channel tactics, tools, and events;
- Strengthen recognition of the Regional Innovation Scheme as the credible program that enables the diffusion of healthcare innovations among academia, research organisations, entrepreneurs, healthcare providers, local and national authorities, other stakeholders

2.2. Detailed work scope

InnoStars requests the following services:

Marketing, social media, and other related digital communications support

- Coordination of pan-European and regional social media, marketing or/and digital campaigns, including organic and paid activities;
- Coordination of high-quality and engaging live online events and online campaigns around them from ideation to execution;
- Preparing complex branding and marketing materials such as brochures, booklet, catalog, slide decks etc. (including their content, graphics, and project coordination);
- Delivering engaging video content for social media (including creative idea, script and execution);
- Delivering basic marketing materials (e.g. series of infographics, rollups, posters, gadgets);
- Coordinating the inbound marketing projects;
- Overall content, marketing and social media advisory up to the latest global trends or new social media features (monthly; up to current needs);
- Regular reporting;

2.3. Deliverables

Service Provider is expected to plan, implement and coordinate the activities, provide high-quality materials, and include a mix of channels to increase optimal reach and engagement. The descriptions of all deliverables are listed below:

- Ten Pan-European social media, marketing or/and digital campaign
- Five online events, webinars, or social media panel discussions' coordination and execution, including their marketing campaigns to increase the number of participants
- Four complex marketing materials (for instance a brochure about innovation trends – from idea through content creation to final authorised material)
- Six short promotion videos/animations for the social media purpose
- Twelve basic marketing materials
- Two inbound marketing projects
- Monthly social media calendar
- Monthly overall marketing and social media advisory
- Monthly, quarterly, and yearly reporting

Pan-European social media, marketing or/and digital campaign: well-planned and implemented course of actions crafted to acquire more participants of the EIT Health programmes and events, strengthen the visibility of the organisation, promote the success stories and reinforce the brand promise. It requires an excellent project timeline, creative motive/theme, copywriting, promotion materials, authorisation process, professional execution, and the project summary. The budget for social media ads or other media buys is not included in the expert service fee.

Online events organisation and campaigns: the comprehensively planned and executed multi-channel campaign with the aim to promote and recruit participants from the identified target audience for the live event or webinar live-streamed on social media; production of the event, securing the highest tech quality and professional support during the event; preparing the graphic materials, scenario, rehearsal for the guests and briefing material.

Examples of the online events (examples of the online events can be found on the EIT Health InnoStars' YouTube channel):

- Talks and interviews with start-uppers and EIT Health InnoStars beneficiaries, for instance, [Rise to the Challenge series](#)
- Online debates, for instance, [Morning Health Talks](#)

Complex marketing materials: e.g. corporate slide decks, brochures, digital catalogs; coordination of the process; creating content; produce key visuals and layouts if necessary (more advanced, outsourced graphic work can be counted separately and not included in the monthly fee)

Basic marketing materials: infographics, series of simple graphics for social media (e.g. a carousel), etc.

Inbound marketing projects: creating and optimising the lead generation process for the chosen EIT Health InnoStars program, i.e. defining a tailor-made customer journey, recommending the marketing content, mailing campaign, proposing social media marketing activities, and similar. It includes also preparing a short handbook of standards

2.4. Methodology and organization of work:

When performing the services, Service Provider shall:

- use its own tools, materials, creative concepts
- have healthcare/tech/start-up/business media/influencers/opinion-makers/ thematic online groups database on European as well as on local level in line with GDPR regulation
- have capacity to run international communications projects to guarantee the highest standard of service, including excellent coordination, multi-projects alignment and timely deliveries;
- abide by the transparency of any external costs (such as paid media campaigns);
- abide by communications and digital marketing IP protection regulations;
- abide by Brand Book rules and EIT Community Communications Protocols;
- monitor the effectiveness of coordinated projects and proactively recommend optimisations to reach the highest level of efficiency;
- Formulate lessons learned and optimisations for the next campaigns.

Service Provider shall indicate one general contact person who coordinates the service delivery and is the main contact person for the Communications Lead of EIT Health InnoStars. The estimated monthly and quarterly coordination activities:

- Kick off meeting/teleconference with the Service Provider team dedicated to the project
- Monthly, quarterly and yearly reporting
- Regular status meetings (usually on a weekly basis)

2.5. Location, timing, planning, reporting

2.5.1. Location

The project will not have a specific office during the implementation – the expert team should mainly help from their home base of operation. Video or telephone conferences are preferred options for meetings.

InnoStars might request Service Provider to travel to its co-locations or to its partners or any other project site designated by InnoStars within the EU. All related travel and subsistence costs shall be reimbursed by InnoStars if justified (for details on reimbursement, please see Annex 3 – External Travel Policy).

2.5.2. Start date & period of implementation

The intended start date is the 23rd of January 2023, and the implementation of the contract is scheduled to end on the 31st of December 2023.

EIT Health InnoStars currently has the budget to cover the needs of the present activities for the year 2023. InnoStars intends to extend the contract with the winner(s) of the present selection process through direct award procedure for an additional year to cover services for 2024. This extension is subject to financial coverage and the quality of the performance provided by the contractor (this offer shall not be binding to InnoStars).

Tracking of the service delivery would be in a form of monthly reports based on InnoStars' own or the service provider's approved template format. Payments shall only be processed once the corresponding monthly report is approved by InnoStars.

2.5.3. Payment terms

Service Provider is entitled to issue an invoice monthly following InnoStars' acceptance of the monthly report confirmed back to the Supplier.

The invoices must contain the expert fee of the given cost and the media buy expenditure as follows:

Expert fee

Tenderer requested to submit a price offer in Annex 1 stating their monthly fee based on the required deliverables and the requested minimum availability terms as per *Section 2.8* and *2.15.1*. The monthly fee of the offer shall include all the expenses incurred during the completion of the services except any additional services requested or any third-party costs (e.g. extra campaigns or releases above the standard requested as per the deliverables; media buy such as paid social media campaign, articles,

external events, printed materials, etc.) that are budgeted in the contract as media buy expenditure. It may vary with up to 25% in case of extended need.

Media buy

The provisional contract would contain a budget of 100,000 EUR. This budget shall not be used as expert cost, it is solely for media buy (paid social media campaign, articles, external events, etc), editing, printing of materials, brochures, banners, flyers, media spots and other non-expert costs (like travel) arising from the operation of this contract.

The above cost items should be selected through “best value for money” selection – which means that each utilisation of such cost item should be reported to EIT Health InnoStars’ designated manager prior to its contracting. When the need is identified, the contractor should seek out approval from EIT Health InnoStars and provide the required documentation necessary as per Innostars’ procurement policy. All quantities, and deadlines for each activity shall be given by the designated InnoStars officer and each shipment shall be billed separately from the normal service invoice of the firm in order to trace the use of the media buy expenditure budget. The media buy expenditure budget is indicative as total, may not be fully used and the winner cannot claim the total amount in case of not used. It may vary by up to 25% in case of extended need.

As a standard, InnoStars pays within 30 days from the date the invoice is received.

2.6. Proposal Schedule

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| Call opens | 09/12/2022 |
| Deadline for requesting clarification from InnoStars (indicative) | 06/01/2023 |
| Last date for InnoStars to issue clarification (indicative) | 06/01/2023 |
| Deadline for submitting proposals | 12/01/2023 |
| Optional negotiation round with the tenderers | 16-18/01/2023 |
| Completion date for evaluating proposals | 18/01/2023 |
| Intended date of notification of award | 19/01/2023 |
| Intended date of contract signature | 23/01/2023 |
| Intended start date of the contract implementation | 23/01/2023 |

2.7. Participation

Participation in this proposal procedure is open to all legal entities that fulfil the minimum criteria.

All participants are required to sign the Tenderers’ Submission form attached and submit it with the proposal. Please note that the tenderer may not modify the text, it must be submitted and signed as provided by InnoStars attached to the request for proposal document as Annex 1.

2.8. Submission of proposal

Proposals are requested to be emailed in English to the following address until the 12th of January 2023 23:59 CET to:

Contact name: for the attention of

Gergely Szabo

E-mail:

innostars.procurement@eithealth.eu

Proposals received after the deadline shall be rejected without any evaluation.

The proposal shall contain the technical response to the service requested (see below), and the financial offer detailed in the tenderer's Submission form (the total price for the services listed in point 2; the form is annexed to this document). Prices must be indicated as net amount.

Tenderers should propose one single price quoted in EUR as a monthly fee to be used throughout all months (the price should be an average price of all the involved experts to be used throughout the entire implementation of the contract and cannot be subject to change or variation unless extra deliverables are requested by InnoStars).

The tenderers shall submit:

- the Submission form (*Annex 1 – digitally, or on-paper signed and scanned, pdf version*)
- detailed CVs of the core team providing all supporting information and proposed structure of working together with InnoStars
- financial statement from the last closed financial year that that shows annual turnover/income
- a presentation about:
 - o one chosen flagship international online (or hybrid, live streamed) B2B event with a reference letter from the client
 - o other conducted B2B online events, such as webinars, panel discussions, conferences in the field of healthcare innovations, education or business creation organizations in the last five years
- CV/job description of the proposed person who would work on the project
- Confirmation of:
 - o availability on demand
 - o availability for a minimum of 10 working days in each month, until the end of the contract (i.e. 31st of December 2023) - as included in '*Annex 1 - Submission form*'

Please consider sending the documents in a compressed format. In case the size of the email is too big (over 20 MB) we may accept content through links to cloud storage, but please do consider expiration date of such links and that we only open applications following the deadline of the tender (i.e. after the 12th of January 2023).

Responses should be concise and clear. The tenderers' 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 request for proposals and has the experience, skills and resources to perform, according to conditions set forth in this proposal and the tenderers' proposal.

2.9. 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.

A proposal not following the instructions of this Request for Proposal can be rejected by InnoStars.

2.10. Additional information before the deadline for submitting proposals

The request for proposal should be clear enough to avoid tenderers having to request additional information during the procedure. In case tenderers need additional information, please address it to:

Contact name: for the attention of **Marta Kaczmarek, communication lead**

E-mail: **innostars.procurement@eithealth.eu**

2.11. Clarification related 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, InnoStars may request the tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit.

2.12. Negotiation about the submitted proposals

After checking the administrative compliance of the tenderers, InnoStars can negotiate the contract terms with the tenderers. In this negotiation InnoStars will ask all tenderers to adjust the proposal or specific sections of the proposal within an appropriate time limit.

2.13. 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.

2.14. Ownership of proposals

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

Selected supplier should accept that during the implementation of the contract and for four years after the completion of the contract, InnoStars has the right - for the purposes of safeguarding the EU's financial interests - to 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.

2.15. Evaluation of the proposals

2.15.1. Minimum criteria

There are minimum requirements tenderer needs to confirm with to pass formal checks. Tenders that are not passing the minimum criteria shall be rejected without further evaluation. Confirmation to the criteria will be solely based on the submitted tender material.

- Tenderer needs to confirm in writing (in Annex 1):
 - availability on demand
 - availability for a minimum of 10 working days in each month, until the end of the contract (i.e. 31st of December 2023) - as included in '*Annex 1 - Submission form*'
- Tenderer needs to dedicate one person who will be a project coordinator for the whole service period with at least 10 years of experience in PR, Social Media, Corporate Affairs, or Events. In case of a change in person during the contract, the client has a right to interview the new potential candidate; Service Provider shall guarantee continuity of project coordination services in such case; in case of not complying, InnoStars reserves the right to introduce penalty measures in the monthly expert fee in case this would not happen, or in the worst case, to terminate the contract
- Tenderer must have at least 500 000 EUR turnover or income in their last closed financial year
- Tenderer is required to submit CVs of the proposed team who would directly work on the contract delivery
- Evidence in social media project(s) conducted for EU institution(s) and/or body (s), state-owned agencies, or other innovation departments of EU agencies (for instance European Innovation Council, SME Executive Agency etc.)
- Tenderer should provide evidence of international digital marketing and/or social media events conducted for B2B Associations, organisations, or institutions operating in the field of healthcare innovations, education, or business creation in the last five years
- **Tenderer should include in their presentation one chosen flagship international online B2B event with a reference letter from the client (the event has to be non-EIT Health related); it should:**
 - be no longer than five slides, and include as a minimum:
 - Type of event: online / hybrid / live streamed in-person
 - Client (or if the name is confidential, please give an industry)
 - Title of the event
 - Date (month/year)
 - Main target audience (one sentence)
 - The goal of the event (one sentence)
 - Website, if any
 - Number of registrants and participants
 - Total number of views
 - Estimated reach

- Geographical span
- At least three of the main and most creative promotion tools and tactics used (e.g. Google Adwords campaign, organic social media posts, LinkedIn DM, influencer marketing)
- Present any other statistics (for instance website traffic), if wished
- Present any recordings, print screens or key visuals, if wished

Please note: InnoStars expects one comprehensive proposal including all required elements in a clearly identifiable manner (including the CV of the coordinator and the rest of the team, evidence of activities/events with related numbers, and the flagship event)

2.15.2. Award criteria

The quality of each proposal will be evaluated per the award criteria below. The award criteria will be examined in accordance with the requested service indicated in Section 2 of the document.

A) Technical evaluation criteria:

- a) Number of online events, such as webinars, panel discussions, and conferences conducted for B2B Associations, organisations, or institutions operating in the field of healthcare innovations, education, or business creation, organised in the last five years. Please include links of the events as well. Maximum score: 20 points
 - Tenderer with the most provided and accepted campaigns: 20 points
 - Tenderer with the second-highest number of provided and accepted campaigns: 15 points
 - Tenderer with the third-highest number of provided and accepted campaigns: 10 points
 - Tenderer with the fourth-highest number of provided and accepted campaigns: 5 points
 - Tenderer with the fifth-highest number of provided and accepted campaigns and after: 0 point
- b) Quality of the presentation about one chosen flagship online B2B event and its estimated impact on the target audience. Maximum score: 40 points
 - Estimated reach: maximum 10 points (The highest provided value will receive 10 points, 2nd highest: 7 points, 3rd highest: 5 points, 4th highest: 1 point, 5th highest and after: 0 points).
 - Industry/Target audience relevancy: maximum 5 points (Industry: healthcare innovation, education or business creation Industry: 3 points; other Industry in innovation, education or business creation: 1 point; Target audience: startups from the healthcare field: 2 points; startups from other field: 1 point)
 - Other presented outcome figures (especially number of participants, or number of views – whichever is the more relevant): maximum 10 points (The highest provided overall value will receive 10 points, 2nd highest: 7 points, 3rd highest: 5 points, 4th highest: 1 point, 5th highest and after: 0 points).
 - Trending promotion tools or tactics: maximum 10 points (10 points – Exceeds the required standards, response the question with precision and relevant tools; 7 points – Meets the standard required, comprehensive response in terms of detail and relevance of tools; 5 points – Meets the standards in most aspects, an acceptable level

of detail, accuracy and relevance of tools; 1 point – Meets only some of the aspects of the standards. Limited information, inadequate or only partially addressed the question.

- Reached number of countries: maximum 5 points (The highest provided value will receive 5 points, 2nd highest: 3 points, 3rd highest: 1 points, 4th highest and after: 0 points).

Total technical score: 60 (weighting: 60%)

B) Price/total cost:

The lowest offered monthly price shall receive the highest score; others shall be calculated in relation to that in a linear equation.

Total financial score: 40 (weighting: 40%)

Total maximum score: 100

The winner shall be the one with the highest aggregated score from technical and financial scores and that bidder shall be proposed for the contract.

2.16. Signature of contract(s)

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

For contracting the template attached in 'Annex 2' shall apply.

Within five days of receipt of the contract from InnoStars, the selected tenderer shall sign and date the contract and return it to the InnoStars. Upon receipt, InnoStars shall also sign and send back to the winner one signed copy. In case the winning tenderer is unable to enter into a contract within the above time period, InnoStars may decide to contract the second best.

2.17. Cancellation of the proposal procedure

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

2.18. 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 InnoStars. The tenderers have 3 days to file their complaints from the receipt of the letter of notification of award.

2.19. Ethics clauses / Corruptive practices

The InnoStars 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, the InnoStars 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 the InnoStars immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

2.20. Safeguarding of EU's financial interest

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

Annexes:

Annex 1: Submission form

Annex 2: Service agreement template

Annex 3: External Travel Policy