



Request for proposals

Opportunity Assessment & Business Plan

EIT InnoEnergy

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EIT InnoEnergy is the trading brand of KIC IE AB



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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 maximizes 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

3.1. General Objectives

3.1.1. Opportunity Assessment

Before accepting a start-up in EIT InnoEnergy's program, EIT InnoEnergy is conducting an Opportunity Assessment study. The assessment is to be presented in a report which will be the basis for the decision of an internal InnoEnergy committee on whether to accept the start-up.

EIT InnoEnergy estimates that it takes up to 100 hours to perform each assessment, hence the level of ambition should be adapted accordingly. Each assessment is to be presented in a report following the attached EIT InnoEnergy Opportunity Assessment Guidelines (*Annex 3*).

Part of the assessment is to review documentation that the entrepreneur will give, as well as interviewing the entrepreneur or other stakeholders, such as potential customers. The consultant(s) is also expected to find other sources of information, in order to assess each opportunity.

The individual sub-assignments will be called off on a need-basis. We roughly estimate the number of individual assignments up to 10-15 during the agreement period of one year.

3.1.2. Business Plan

For Business Plan (BP) assignment, the following parameters should be considered:



- Elaboration of Business plans for start-ups in the energy sector
- Financial projections for start-ups in the energy sector
- Preparation and delivery of documentation according to EIT InnoEnergy Business Plan guidelines (*Annex 4*).

Start-ups accepted into the EIT InnoEnergy program receive activity-based financing, typically during a two-year period. In return for services provided, EIT InnoEnergy receives a call-option to buy shares in the start-ups or other success-based financial returns, such as royalty. Whether EIT InnoEnergy should exercise the call options to become a formal shareholder, is decided by an internal European EIT InnoEnergy committee. Their decision is made after reviewing documentation where the Business plan together with an Executive summary are vital pieces.

The ventures can also use the BPs for other purposes, such as recruiting, fundraising and planning their own activities.

EIT InnoEnergy estimates that it takes about up to 120 hours to perform each assignment, hence the level of ambition should be adapted accordingly.

The individual sub-assignments will be called off on a need-basis. We roughly estimate the number of individual assignments to be up to 10 during the agreement period of one year.

3.2. Detailed scope of work

Experts required (implementation of methodology of work):

Name and CV's of the participating individuals indicating the relevant experience in accordance with the below minimum requirements should be submitted as part of the offer.

3.2.1. Senior business consultant

Work profile: Business consultant advice regarding opportunity assessments, business plans as well as specific advice on financing options and preparation of investor material for start-ups within the energy sector.

- a) general professional experience – minimum years required after graduation: 8 years.
- b) specific professional experience: minimum years of experience in the field of opportunity assessment and business plan elaboration for start-ups: 5 years.
- c) specific professional experience: minimum years of experience in the field of business consulting within the energy sector; 5 years.
- d) specific professional experience: minimum years of experience in the field of access to finance, including financing options, especially public funding as well as preparation of Investor materials for start-ups; 5 years.

3.2.2. Junior business consultant

Work profile: Business consultant advice regarding opportunity assessments, business plans as well as specific advice on financing options and preparation of investor material for start-ups within the energy sector.

- a) general professional experience – minimum years required after graduation: 4 years.
- b) specific professional experience: minimum years of experience in the field of business consulting towards start-ups: 2 years.



- c) specific professional experience: minimum years of experience in the field of business consulting within the energy sector; 1 year.
- d) specific professional experience: minimum years of experience in the field of access to finance, including financing options and preparation of Investor materials: 1 year.

The tender should propose a team of experts, a minimum of five experts, of which at least three experts should be at Senior Business Consultant level. For all, detailed CVs are to be presented. It is necessary to meet the minimum requirements to be compliant.

3.3. Supplier's insurance coverage

Sufficient, acceptable and satisfactory insurance coverage by supplier for this specific assignment.

- 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 SEK per event per insurance.

3.4. Location, timing, planning, reporting

3.4.1. Location

The project will not have a specific office during the implementation – the expert team should mainly provide assistance from their home base of operation. We intend to work like a virtual organization. Video conferences and telephone conferences are preferred options for team meetings.

On a needed basis, experts can be called for specific assignments either to EIT InnoEnergy SE or its co- locations or to its partners or any other project site designated by EIT InnoEnergy. All costs borne for such travel shall be subject to reimbursement detailed later.

3.4.2. Methodology and organization of work

Proposed way of work. You are requested to formulate a detailed proposal regarding the methodology or approach of organization of your own work (based on your own knowledge and experience working in this field of expertise). You are requested to propose an organigramme of your expert team and their intended participation during the implementation.

The level of detailedness and compliance with our RFP and your proposed methodology shall be evaluated and scored in Section 4.9 – Evaluation of proposals.

3.4.3. Start date & period of implementation

The intended start date is March 31st, 2023, and the period of implementation of the contract will be until March 30th, 2025.

In case of additional budget available, EIT InnoEnergy intends to continue with the same supplier who has been selected through the present supplier selection process with additional 2 years extension through direct award procedure once the budget is known for the years 2026 and 2027 with the same scope and estimated number of assignments. The supplier's performance shall be constantly monitored and evaluated at the end of each year.

In the event of additional years are awarded to the same supplier, the prices offered under the present procedure can only be adjusted with the applicable official inflation rate of the country for



that year. In order to provide full transparency and equal treatment, all bidders are requested to present their price offer in relation to the above and to the below concept:

- Price offer for 2023-2025.
- Option for 2026 and 2027 in case the budgets are available. All prices are the same as for 2023- 2025 with only possible revision with the official applicable inflation rate of the country published by the Statistics Sweden (Statistiska Centralbyrån).

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 (*Annex 1*) attached and submit it with the proposal. Please note that the tenderer may not modify the text, it must be submitted signed as provided by EIT InnoEnergy attached to this request for proposal document.

4.2. Submission of proposal

	DATE
Publishing RFP on website	2023-02-15
Deadline for requesting clarification from EIT InnoEnergy	2023-03-03
Deadline for submitting proposals	2023-03-13
Intended date of notification of award	2023-03-20
Intended date of contract signature	2023-03-31

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

Contact name: for the attention of Johanna Lindahl

E-mail: johanna.lindahl@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 SEK. The tenderers are expected to propose a fixed hourly rate for a Senior Consultant and a Junior Consultant. 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 *SEK* 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 proposal 90 days after the deadline from 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. 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 Johanna Lindahl

E-mail: johanna.lindahl@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 proposals

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.

Evaluation criteria

1. Experience and competences of the members of the proposed expert teams related to Opportunity Assessments
(maximum point: 15)
2. Experience and competences of the members of the proposed expert teams related to Business Plans
(maximum point: 15)
3. Experience and competences of the members of the proposed expert teams related to Access to Finance
(maximum point: 10)
4. Methodology approach of project and proposed project implementation (maximum point: 15)
5. Liability exposure: tenderer with best insurance coverage and least changes to contract template shall receive the highest score
(maximum point: 5)

Total technical score: 60 points maximum

6. Price or total cost: lowest offered expert unit price shall receive the highest score, other shall be calculated in relation to that in linear equation (maximum point: 40)

Total financial score: 40 points maximum

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 (*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 10 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 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, color 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: IE Opportunity Assessment Guidelines

Annex 4: IE Business Plan Guidelines