



Request for proposals

Subcontracting of Strategic Advisory Activities for the Execution of Project CRM Facility

InnoEnergy

Company KIC InnoEnergy SE

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2. Overview of InnoEnergy

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 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 of the CRM Facility

The European Union (EU) is dependent on the imports of critical raw materials (CRMs) from so-called third, i.e. non-Union member, countries. In order to satisfy the need for CRMs, without being dependent on one country or supplier, the EU needs to establish trade routes with third countries.

The CRM Facility has its core objective to start the process towards developing and integrating CRM value chains between selected third countries and European industry, with later exploitation resulting in secured access to CRMs through business cooperations and investment opportunities for EU investors, and at the same time promoting value-added activities in the partner countries.

The geographic scope of the CRM Facility is not only in EU CRM partnership countries, but also where there is considerable geopolitical interest and willingness for mutual cooperation, such as in Ukraine, Central Asia, East/South-East Asia (Philippines, Indonesia), Latin America and the Western Balkans.

The CRM Facility's ambition is to:

- Identify CRM value chain investment opportunities in third countries based on evaluation of specific projects, and
- Actively encourage collaboration between EU and local stakeholder groups along the CRM value chain
- Gather private support for CRM value chain project operationalization by pooling resources, integrating financial and knowledge from both EC-level as well as from its member states,

and comprising European industry, commercial as well as public finance, i.e. in a 'Team Europe' approach

- Leverage public support to accelerate and de-risk business cooperations and private investment in CRM projects in third countries.

The core objectives of the Project can be summarized as follows:

- Setting up local intelligence networks between the Facility and key stakeholders and interest groups to promote intelligence and contact points in countries of origin.
- Drafting of strategic studies in order to address key questions and highlight opportunities and risks.
- Capacity building and trainings. Design of learning modules to cover various CRM-related aspects for the benefit of various stakeholders.
- Organisation and logistical support of EU Business Missions to EU priority countries
- Strengthening business ties between European, local and international companies.
- Promotion of EU participation and visibility in international mining conferences and events
- Identify and advise on a pipeline of potential business investment projects along the CRM value chains that can be jointly developed with the EU private sector in third countries (with a focus but not limited to those countries covered by a strategic partnership with the EU).
- The CRM Facility will scout for projects mainly on the countries where the EU has partnerships, and will find (and report) those of them that make sense from a Business point of view, and also from the angle of integration into European Value Chains. It will make a further deep-dive into these projects (teams, technology, permitting, mineral resource, etc.) in order to find (and report) those that the CRM Facility considers bankable. These projects will be presented to European financing, strategic and off-taking stakeholders in working sessions, and the CRM Facility will take an active role in making these projects engage in investment/financing/commercial relationships with the European stakeholders.

InnoEnergy is subcontracting the non-core activity of providing strategic advisory and support within the scope of the CRM Facility Project.

The subcontractor shall comply and be responsible with the following:

Strategic Advisory on Global CRM Geopolitics

- Actively monitor and interpret the evolving European and global (geo)political landscape impacting CRM supply chains.
- Provide guidance on framework conditions (energy, infrastructure, finance, in-country processing and refining) required to enable successful CRM projects.
- Advise when EU intervention is necessary to address systemic challenges or project-specific obstacles.
- Assess international trade dynamics, including tariffs, export controls, and local content requirements.
- Explore partnerships with like-minded nations to strengthen CRM demand and reduce dependency on dominant global actors.
- Provide support materials for the project consortium on Strategic Advisory on Global CRM Geopolitics

EU Positioning and Messaging for Key International Events

- Ensure alignment of CRM Facility objectives with major global events (e.g., G20 Summit) to secure tangible outcomes.

Support for Project-Level Deal Structuring and Country Engagements

- Advise on strategies to mitigate competition from global actors targeting the same mineral resources.
- Ensure project compatibility with EU policies, including the Clean Industrial Deal and defense preparedness strategies.
- Provide recommendations on consolidating the EU offer for projects selected by the CRM Facility.

Participation in Key Events and Missions

- Upon agreement with InnoEnergy, participate in selected international investment missions and events worldwide, subject to at least six weeks' prior notice to confirm availability.
- Documentation of engagement with key partners

Enhancement of CRM Facility stakeholder base

- Expand the stakeholder base of the CRM Facility, adding new audiences/interested parties/potential financiers and off-takers, etc. to facilitate the CRM Facilities objectives. Use his/her own contacts to get to new stakeholders that can help the bankability of the Projects assessed by the CRM Facility.

The gathered information for the activities above will be put it in form of a one-pager summary Report or fiche to be submitted to InnoEnergy. Additional information can be provided in a mixture of Excel, Word and PowerPoint.

Please find below the list of countries of relevance for the project's objectives.



The contribution is expected to be performed until the month of June 2026. The contribution in PMs and duration of the Service Agreement might be extended if required to complete the tasks described above in case the Project is expanded in scope and/or time, in such case the extension will be subject to the agreement of both parties. Therefore, if InnoEnergy intends to extend the contract with the winner of the present supplier selection process, this will be done through a direct award procedure. This extension is subject to financial coverage and high-quality performance of

the contractor as well as continuing need for the services. The extension should be at the latest till December 2026 and a value less than the value of the initial period till June 2026.

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 InnoEnergy attached to the request for proposal document.

4.2. Submission of proposal

	DATE (Calendar dates)
Publishing RFP on the InnoEnergy website	05.12.2025
Deadline for requesting clarification from InnoEnergy	10.12.2025
Deadline for submitting proposals	16.12.2025
Intended date of notification of award	18.12.2025
Intended date of contract signature	26.12.2025

Proposals must be emailed in English to the following address:

Contact name: for the attention of Mr. Alessandro Romanello

E-mail: Alessandro.romanello@innoenergy.com

The proposal shall contain:

- the technical response to the service requested (point 4.9).
- the financial offer (the price for the services.) The Financial offer must be presented in <Euro (use the applicable currency of your country)>. 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 (use the applicable currency of your country)>) 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 counter-proposals, 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 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 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, InnoEnergy could arrange a clarification session which will be communicated to the tenderers.

Contact name: for the attention of Mr. Alessandro Romanello

E-mail: Alessandro.romanello@innoenergy.com

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*

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, 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, 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, InnoEnergy may negotiate the contract terms with the tenderers. In this negotiation InnoEnergy will ask all tenderers to adjust the proposal or specific sections of the proposal within an appropriate time limit. In case of negotiation, 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. Policy and Strategic Advisory Expertise (maximum points: 15)
 - a. Proven experience in shaping EU industrial, energy, and raw materials policy at senior level.
 - b. Ability to navigate complex geopolitical and geoeconomic landscapes impacting CRM supply chains.
2. Global Positioning and International Engagement (maximum points: 10)
 - a. Track record of representing EU interests at major international events (e.g., G20, UN forums).
 - b. Capacity to develop and deliver coherent EU messaging aligned with strategic objectives.
3. Technical Capacity in CRM and Industrial Policy (maximum points: 15)
 - a. Expertise in resource efficiency, circular economy, and sustainable investment strategies.
 - b. Experience in structuring partnerships and frameworks for critical raw materials projects.
4. Experience in Deal Structuring and Country Engagements (maximum points: 10)
 - a. Ability to advise on project-level negotiations and mitigate competition from global actors.
 - b. Familiarity with EU Clean Industrial Deal and defense preparedness policies.
5. Methodology and Implementation Approach (maximum points: 5)
 - a. Clear, actionable plan for delivering strategic advisory and engagement tasks.
 - b. Demonstrated ability to mobilize internal and external resources effectively.
6. Risk and Compliance (maximum points: 5)
 - a. Strong understanding of EU governance, compliance, and liability frameworks.
 - b. Capacity to ensure minimal contractual deviations and robust risk management.

Total technical score: 60 points maximum

1. 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 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 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 2 days of receipt of the contract from InnoEnergy, the selected tenderer shall sign and date the contract and return it to InnoEnergy. Upon receipt, 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, InnoEnergy may decide to contract the second best.

4.11. *Cancellation of the proposal procedure*

In the event of cancellation of the proposal procedure, InnoEnergy will notify tenderers of the cancellation. In no event shall 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 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 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*

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, 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 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 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, 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.