

# Request for Quotation – REVISION 2

## For: Support to Deep demonstration Slovenia project on Mobility

Date: 20 June 2024

## 1 Overview

### 1.1 Executive Summary

This is a Request for Quotation (RFQ) that details EIT Climate-KIC’s requirements for services. Please treat this document in accordance with the confidentiality obligations detailed further in this document.

Services and/or goods requested	Procurement to carry out research, analytical and supportive tasks in the area of mobility as specified in Chapter 4 for EIT Climate-KIC’s work in the project Deep demonstration in Slovenia.
The legal entity requesting these goods and/or services	Climate-KIC Holding B.V., Podružnica v Sloveniji (Slovenian Branch)
Services and/or goods will be delivered to the following locations	Services will be delivered remotely, and some onsite services will be required at Ljubljana, Slovenia
EIT Climate-KIC Contract Manager for submitting quotes and inquiries	Barbara Simonič Designer&Producer barbara.simonic@climate-kic.org
Proposed contract term for successful candidates	9 months, may be extended for additional 3 months at EIT Climate-KIC’s discretion

### 1.2 Timelines

EIT Climate-KIC has set the following indicative timelines for this RFQ:

Planned Date*	Milestones
6.6.2024	RFQ issued to bidders
Within 2 business days of receiving this RFQ	Bidders to confirm they will respond to RFQ
3 business days before the Submission Deadline	Deadline for bidders to submit questions on the RFQ
5.7.2024	Bidders submit quotes / Submission Deadline
Expected 9. 7. 2024	EIT Climate-KIC team to review quotes EIT Climate-KIC to gain clarification from bidders
Expected 10. 7. 2024	Notification of contract award
Expected 15. 7. 2024	Proposed contract start date

\* EIT Climate-KIC reserves the right to amend this timetable during the RFQ.



### 1.3 How you can participate

1. Review the RFQ documents provided by EIT Climate-KIC.
2. Email the Contract Manager letting us know you will submit a quotation (within 2 business days if possible).
3. If you have questions on the RFQ, email the Contract Manager at least 3 business days before the submission deadline. We aim to respond in a timely manner wherever possible.
4. Submit a quote following the requirements at Section 0 by the Submission Deadline stated at Section 1.2.
5. EIT Climate-KIC will assess bids and notify bidders following the timeline at Section 1.2.

### 1.4 About EIT Climate-KIC

EIT Climate-KIC is the EU's climate innovation initiative, working to accelerate the transition to a zero-carbon and resilient world by enabling systems transformation. Headquartered in Amsterdam, it operates from 13 hubs across Europe and is active in 39 countries. EIT Climate-KIC was established in 2010 and is predominately funded by the European Institute of Innovation and Technology (EIT), a body of the European Union.

As a Knowledge and Innovation Community (KIC), it brings together more than 400 partners from business, academia, the public and non-profit sectors to create networks of expertise, through which innovative products, services and systems are developed, brought to market and scaled-up for impact. See <https://www.climate-kic.org/> for more information.

## 2 Confidentiality

All information provided in this Request for Quotation (hereinafter "RFQ") document and any information that may be subsequently disclosed during discussions, correspondence and negotiations is confidential and must not be disclosed to any other party or used for any other purpose whatsoever without the prior written permission of Climate-KIC Holding B.V. or relevant subsidiary (hereinafter "EIT Climate-KIC").

The Supplier must not disclose any such information, materials, specifications or other documents to any third parties or to any other part of the Supplier's group or use them for any purpose other than for the preparation and submission of a response to this RFQ. The Supplier must not make any press announcements or publicise in any way EIT Climate-KIC's name, this document, the quotation process or any subsequent agreement without the prior written consent of EIT Climate-KIC.

EIT Climate-KIC may require the execution of Non-Disclosure Agreement as part of this RFQ or for future commercial engagements. As part of preparation for the submission of the response and in any subsequent negotiations, the Supplier is allowed to disclose confidential information to others within the Supplier organisation, external advisors or subcontractors, provided that the confidentiality conditions are adhered to.

Employees of either party who have access to confidential information must be notified of their obligations with regard to confidentiality and of the disciplinary proceedings which will result if confidentiality conditions are breached.

### 3 Introduction and Background

The Slovenian government has started working with EIT Climate-KIC on the [Deep Demonstration of a Circular, Regenerative and Low-Carbon Economy in Slovenia](#) to develop pathways for a more radical transition to climate neutrality through a circular economy, using a systems innovation approach.

Slovenian Deep Demonstration process entails creating a **portfolio of integrated interventions** developed in cooperation with local and international stakeholders. A portfolio approach involves developing and dynamically managing a collection of projects, initiatives, or innovation actions in a coordinated and holistic way to achieve a more significant and transformative impact on the entire system and across the five value chains that were selected for the Deep Demonstration programme in Slovenia – built environment, food, forest-based & wood, mobility and manufacturing.

In the context of collaboration with the Slovenian Ministry of the Environment, Climate and Energy (MECE) on the development of a **new National Transport Strategy** (more information to be provided upon selection) EIT Climate-KIC proposes to adopt a systemic approach and develop an integrated perspective of various initiatives impacting the transport system in Slovenia. This entails considering a broader set of policies alongside on-the-ground activities and projects in the wider international and national sphere to enhance the preparation of the strategy and support the ongoing processes of the Unit for Sustainable Mobility at MECE. A portfolio here refers to a collection of interconnected strategic objectives specifically designed and selected to target various leverage points identified to catalyze systemic changes in the transport system of Slovenia. This portfolio serves as a decision-making tool to drive action, fostering a more coordinated approach to achieving the desired strategic vision.

For the **development of the mobility portfolio**, an action plan has been prepared in collaboration with the Unit for Sustainable Mobility at MECE with the following tasks to be delivered:

- 1.) Comprehensive mapping and review of relevant international and national strategic, legal, and procedural documents, alongside ongoing projects and initiatives influencing the transport system in Slovenia, including exploration of funding and financing mechanisms for the 3 priority areas (mobility, spatial proximity, digital connectivity) - Insights reports for the three priority areas are foreseen for October
- 2.) Stakeholder mapping and updates done in collaboration with the Unit for Sustainable Mobility at MECE for targeted stakeholder engagement approach at various steps of the process - Stakeholders list and engagement strategy is foreseen first version in May, second in October before the workshops
- 3.) Three multi-stakeholder workshops to establish the overall intent (strategic vision), discuss priority areas and further explore one, integrated view of different initiatives; to align on strategic objectives for each activation area and discuss potential course of action and to support portfolio governance and explore required collaboration mechanisms to take forward selected strategic objectives – in October, December and March 2025 in Ljubljana, Slovenia
- 4.) Interviews and meetings with relevant stakeholders to gain further insights and perspectives on the outcomes of the mapping and analysis of both, a broader set of policies and on-the-ground activities to gain a deeper understanding of the current challenges, barriers, gaps, and opportunities for each priority area and identified strategic priorities.
- 5.) Portfolio brief development to outline the SWOT analysis, established vision, framework, and strategic objectives in a synthesized and visual way, leveraging inputs from the previous steps.

A regular rhythm of monthly interactive meetings with the representatives of the Unit for Sustainable Mobility at MECE is foreseen to discuss progress, align and coordinate next steps, as well as practice continuous sensemaking and learning throughout the process. The supporting team of the Deep demonstration project in Slovenia consists of several experts, and work is mostly conducted online except for the in-person workshops.

The desired outcome of this procurement is an insights report, specified in detail below, that will respond to the first point above, in the area of mobility (and collaboration with the other two subcontractors selected to cover other 2 priority areas, namely spatial proximity and digital connectivity), and cooperation in meetings and workshops in other points, as specified in more details in section 4. The goal is to inform the process of building strategic objectives of the national transport strategy of Slovenia in order to meet the climate and sustainable mobility goals.

Inspired by the [Triple Access Planning for Uncertain Futures – A Handbook for Practitioners – Triple Access Planning for Uncertain Futures \(tapforuncertainty.eu\)](#), this part of the research aims to focus on the mobility aspect of providing access.

## 4 Specification

### 4.1 Scope

EIT Climate-KIC is requesting a quotation for services for the production of a **report** with the following contents:

- 1.) Comprehensive review and analysis of the relevant international and national strategic, legal, and procedural documents that affect the transport system in Slovenia at all levels (WTO, UN, ICAO, IMO, OECD, EU, regional, neighbouring countries) from all areas – air, maritime and land transport, climate and environmental goals such as emissions, noise pollution, energy and connectivity standards, road safety and operations standards, competition regulations and free market rules, research&innovation, companies obligation, workers' rights and wider social goals etc.
- 2.) Mapping of the relevant international and national goals and commitments in all areas affecting the transport system in Slovenia to produce a matrix of goals showing the overlapping, synergies and trade-offs, general interactions and their consequences for the transport system, identification of the most impactful areas of convergence, co-benefits and most important divergent factors
- 3.) Identification and analysis of ongoing projects (infrastructure, research, implementation or any kind of EU or national project that is relevant in this sphere) and initiatives (could be a legislative, project idea, citizens' initiative or other) influencing the transport system in Slovenia, with insights to identify trends, opportunities, key influencing factors, gaps, needs for further exploration
- 4.) exploration of funding and financing mechanisms at the EU and national level and innovative financing mechanisms that can be used to fund interventions
- 5.) Preparation of the SWOT analysis on the basis of the analysis in the previous points

A draft version of the report should be produced within 3 months of signing the contract. The final version of the report is to be submitted after the feedback from the process, probably in the next 3 months.

The selected subcontractor is also expected to contribute to the analysis of key stakeholders in the area and to map collaborations, to inform the processes of developing the transport strategy. The selected subcontractor is expected as well to join relevant meetings during the process and actively participate in workshops (3) to be organized in Ljubljana, Slovenia, by the Slovenian team.

The selected subcontractor will be further requested to engage (hire) people in **the International Expert Panel (IEP)** and cover their expenses. Establishment of the International expert panel is foreseen to collect insights (during 3 online meetings) on the work process, review the analyses prepared by external subcontractors, prepare opinions and expert assessments of the analyses and participate in meetings and workshops in Slovenia (2). The final composition of the IEP will be decided in consultation with the contract owner but should involve between 10-20 people from key institutions across Europe. The IEP is to be convened by the Deep demonstration project to support portfolio development and activation and should offer insights and feedback on all 3 priority areas.

The contract can be appointed to a panel of providers. A panel of up to 5 could be selected and then appointed contractually prior to delivery of services. Appointment to the Panel does not guarantee award of work. EIT Climate-KIC reserves the right to seek quotation from one or more panel members during the duration of the contract at our own discretion.

The supplier will ensure sufficient financial, economic, technical and professional capacity to deliver the services in an efficient and effective manner.

The services will be delivered to meet the following project milestones:

Milestone	Time frame
1 <sup>st</sup> Phase: Intent development and portfolio framing	Until October 2024
Report prepared and sent	End of September 2024
Workshop 1, meeting of IEP	October 2024
Stakeholder mapping	November 2024
Workshop 2, meeting of IEP	December 2024
Stakeholder mapping updates	January 2025
Final Report	February 2025
Workshop 3, meeting of IEP	March 2025

#### 4.2 Methodology

The service provider is asked to utilise a suitable and professionally accepted methodology that takes into account both quantitative and qualitative aspects in order to deliver the services. The methodology should consider:

- Desk analysis
- Expert assessment
- Any other relevant methodology of their choice.

#### 4.3 Deliverables

The following deliverables are requested:

**Deliverable 1:** Draft report

Requirements:

- 5 points from the scope specifications above

**Deliverable 2:** Final report

Requirements:

- Taking into consideration feedback and new information

**Deliverable 3:** Expert feedback on the process and results

Requirements:

- In writing or in person at workshops

Reports will be requested to be written at a suitably professional standard using recognized referencing. The format and structure will be discussed during a preliminary briefing with the successful party. The reports are to be provided for unrestricted use by EIT Climate-KIC and free from all third-party copyright restrictions. EIT Climate-KIC will receive ownership of such work products and may make them available

to other parties, publish online, or other at our discretion. Further requirements regarding the reports include:

- The EIT Climate-KIC brand guidelines provide the requirements for the use of our logo. These are publicly available at <https://www.climate-kic.org/who-we-are/media-and-brand/>. The extent that other requirements (e.g. typeface) apply to the report can be discussed with the Contract Manager.
- The provider should allow for rounds of review by EIT Climate-KIC and subsequent edits to ensure acceptable quality of the completed report.

#### 4.4 Sustainability

In order to uphold our commitment to sustainability, EIT Climate-KIC aims to minimise any negative impact we may have on the natural and built environment by effectively managing our resources.

The following requests are made of the bidder:

- The services are to be delivered digitally following a paperless policy.
- For participation in workshops, train travel will be prioritized. We ask our service providers to consider the greenhouse gas emissions from transport to our events. Cycling, walking and public transport should be favoured over private transport (car or taxi), and rail should be used whenever possible over air travel.

#### 4.5 Eligibility

EIT Climate-KIC reserve the right to reject quotes where the proposed supplier:

- Has insufficient technical, professional or financial capacity to deliver the services.
- Has been bankrupt or insolvent (last 7 years)
- Is sanctioned by a relevant authority
- Does not comply or has previously not complied with our [Ethical Standards for Contractual Counterparties](#)
- Has been convicted of crime, links to terrorism, breach of tax or social security obligations
- Is an individual prior employee of an EIT Climate-KIC or group entity (discretionary basis)
- Will continue to be a full-time employee of an EIT grant recipient or EIT Climate-KIC partner during the contract term (discretionary basis)

If any of these scenarios apply, please make EIT Climate-KIC aware in your submission.

#### 4.6 Required Experience and Capabilities

The team delivering the services should be able to demonstrate the following experience and capabilities, i.e. at least 5 members of the team have proven track record and can demonstrate their expertise by means of:

- Experience in analysing the policy landscape in the area of sustainable mobility.
- Knowledge of the transport systems' impacts and goals, set at the EU level.
- Experience in working on European projects and/or initiatives in the field of mobility.
- Working knowledge of funding and financing mechanisms in the area of transport.
- Developing and delivering analytical and audience-friendly reports.

#### 4.7 Payment & Invoicing

- Payments will be made following the provision of a correctly rendered undisputed digital (via email) invoice to EIT Climate-KIC. The EIT Climate-KIC contract manager will inform the successful bidder where to submit invoices.
- Payment terms associated with delivery of the goods and/or services must be not less than net 30 days.
- EIT Climate-KIC can provide a purchase order number to be referenced on invoices.

4.8 As EIT Climate-KIC is requesting services over a long period of time, we ask that bidder's invoice be submitted upon completion of the deliverables.

- Requests for deposit payments are generally not accepted.
- If the bidder is requesting any form of payment prior to delivery of goods and/or services, this must be raised with EIT Climate-KIC.

#### 4.9 Contract Management

EIT Climate-KIC can share their standard terms and conditions but will consider the bidder's own terms and conditions on the basis that the bidder can incorporate the following:

- EIT Climate-KIC requires that service providers provide an indemnity to EIT Climate-KIC for breach of third-party intellectual property rights;
- EIT Climate-KIC's primary source of funds is the European Institute of Innovation and Technology (EIT) [eit.europa.eu/](http://eit.europa.eu/). Consequently, EIT Climate-KIC is obliged to pass through certain FPA/SGA terms to all service provider and service providers are required to agree and comply with such terms. See <http://www.climate-kic.org/policies/>;
- In addition, EIT Climate-KIC will ask that service providers comply with the Ethical Standards for Climate-KIC Contractual Counterparties available at <https://www.climate-kic.org/policies>
- Service providers are required to comply with EIT Climate-KIC's standard data protection clauses (can be provided in advance on request) and provide an indemnity for any breach;
- The liability of the service provider to EIT Climate-KIC (and affiliates) to be uncapped in respect of breach of data protection clauses. For all other heads, liability of the service provider to EIT Climate-KIC (and affiliates) may be capped at a reasonable multiple of fees not less than 2X. If applicable, EIT Climate-KIC liability to service provider also be similarly capped;
- No indemnities extended by EIT Climate-KIC to service providers.



## 5 Award Criteria

EIT Climate-KIC will assess bids based on the following factors:

Component	Weighting
Cost – the total cost for providing the scope.	40%
Quality of proposal – suitability and capability of the proposed services to deliver the scope and requirements in the Specification as evidenced by its Response.	50%
Ability of the bidder to fulfil the scope of services, in a manner consistent with EIT Climate-KIC's objectives and those of this project, as evidenced by its Response and References as well as Experience and Capabilities – the ability to meet the requirements as evidenced by its response.	10%
<b>Total</b>	100%

## 6 Instruction to Bidders

### 6.1 Responding with your quote

EIT Climate-KIC is requesting the following be submitted to bid on this contract:

1. A **Response** that sufficiently details the bidder's offer and responds to the requirements contained in this document.
  - The bidder is kindly asked to include their trading name, VAT or tax identification number (if applicable) and registered trading address (*please note, address is not required for an individual*).
  - Include website links to examples of work previously performed by the bidder (e.g. portfolios, work products or other)
  - Professional references that can be reached by EIT Climate-KIC to verify previous services delivery
2. A **Quotation** that meets the requirements described in Section 6.2
3. Resumes of individuals that will be assigned to conduct the services for EIT Climate-KIC

Any alternative solutions or services that the bidder may wish to bring to the attention of EIT Climate-KIC should be included at the end of your response. EIT Climate-KIC reserves the right to reject RFQ responses that do not confirm with these guidelines.

**All responses shall be made to the Contract Manager (refer Section 1.1) via electronic copy**

### 6.2 Quotation requirements

EIT Climate-KIC request that bidders quote in the following manner as appropriate to delivery of the services:

- Please provide itemised quotations in Euros and specify if the quote includes / excludes VAT or any other taxes;
- Provide a rate card for relevant grades of employment that will be conducting services for EIT Climate-KIC (e.g. day rate) instead of averaged rates. These may be used for additional services.
- Travel and subsistence for these services are strictly limited. Domestic travel and subsistence will not be reimbursed unless agreed in advance and in writing with EIT Climate-KIC. If you require international transport and/or accommodation, please make this clear and estimate costs in your quotation. Time for travel will not be billable hours.
- Include all applicable costs or charges associated with providing the services in your quotation.

### 6.3 Subcontracting guidance

It is acceptable for bidders to sub-contract parts of the service, but EIT Climate-KIC is keen to understand which elements of the service this would apply to. In your response, state which sections are proposed to be subcontracted and advise EIT Climate-KIC of the sub-contractor's name and address (address is not required for an individual).

## 6.4 Terms of this RFQ

1. Your response should be submitted according to the instructions as detailed in this section and should be valid for a period of at least six (6) months from the bid due date. Any response submitted outside the scope defined may be rejected without provision for re-submission.
2. Any further information pertaining to this RFQ, of whatever nature, must be directed to the Contract Manager detailed in Section 1.1. If a point of clarification materially affects the RFQ, our response will be circulated to all bidders, otherwise the response will only be sent to the bidder seeking clarification.
3. If any doubt exists concerning any element of this RFQ, a clear statement should be made on the assumptions taken to arrive at your quoted costs, or alternatively contact us prior to submitting your response to seek clarification.
4. Entering into contractual arrangements with EIT Climate-KIC in connection with this RFQ does not guarantee work will be awarded.
5. EIT Climate-KIC reserves the right to reject any response(s) received after the submission date/time.
6. EIT Climate-KIC reserves the right to undertake post-bid negotiations with none, all or a shortlist of bidders.
7. EIT Climate-KIC, at its sole discretion, reserves the right to accept or reject any or all of the responses received and not to award any business and shall not be bound to give reasons for any decision. Only the execution of a written agreement between an EIT Climate-KIC entity and a supplier(s) will obligate an EIT Climate-KIC entity in accordance with the terms and conditions contained in such agreement.
8. EIT Climate-KIC reserves the right to procure services from alternative suppliers(s) where the successful bidder is, or becomes, uncompetitive within the market. However, issues over pricing and specification will be resolved through discussion and mutual agreement between EIT Climate-KIC and the supplier.
9. Bidders are required to email soft copies of their response to the Contract Manager detailed in Section 1.1 based on the timeline at Section 1.2.
10. As per above and where applicable, bidders must acknowledge receipt of this RFQ by return email to the Contract Manager detailed in Section 1.1 confirming whether they intend to submit a response by the Submission Deadline.
11. This RFQ does not commit or obligate any EIT Climate-KIC company to pay any expenses incurred by you in the preparation of your response. All such expenses are solely at the risk of the bidder and by submitting a response you automatically agree that response becomes the property of EIT Climate-KIC.
12. Responses are to be kept as clear and concise as possible and should be sequenced and numbered in accordance with the format of this RFQ.
13. The formatting of this document and the attached response document should not be altered.
14. Whilst this RFQ confers no legal rights on its addressees, it is not intended that any other persons acquire rights or obligations in respect of or arising under it.
15. Unsuccessful bidders agree, by the submission of their response, to return to EIT Climate-KIC this RFQ and any and all papers, records, data and materials supplied to them in connection with it, including all copies made by them.
16. This RFQ is for consideration in whole and not in part or parts unless otherwise indicated.
17. All efforts have been made to ensure the accuracy and validity of information contained in this RFQ. However, EIT Climate-KIC does not warrant the information accurate or comprehensive.

# Annex 1 - Clarifications

## 1- Clarification on Timelines

EIT Climate-KIC has set the following **indicative timelines** for this RFQ:

Planned Date*	Milestones
6.6.2024	RFQ issued to bidders
Within 2 business days of receiving this RFQ	Bidders to confirm they will respond to RFQ
3 business days before the Submission Deadline	Deadline for bidders to submit questions on the RFQ

Since the timeline is indicative, there is no obligation for bidders to confirm they will respond to this RFQ, but it is recommended that the questions are sent before the submission deadline as we can not ensure that the questions can be answered in the last three days.

## 2- Clarification on the cost criteria

The estimated overall budget anticipated for the scope of work is not more than 60.000,00 EUR (VAT excluded), out of that an estimated budget for the engagement of the expert panel (time and expenses) is around 10.000,00 EUR.

## 3- Clarification on the panel of providers

Page 6 of the RFQ (last paragraph on the page) notes that the contract can be appointed to a panel of providers and that EIT Climate-KIC reserves the right to seek quotation from one or more panel members during the duration of the contract.

This is a standard discretionary provision. It is there to enable EIT Climate-KIC to deliver the project where no one bidder can fully deliver on the scope. So this means that the scope of works in this RFQ could be broken up into smaller contracts and additional quotations would be sought for each piece of work, but it is not the first plan initially.

## 4- Clarification on the distinction between a panel of providers and the International Expert Panel (IEP)

It is mentioned on page 6 that a panel of providers can be selected and that is applicable to the full contract, meaning that bidders can also respond to the quote with a panel of providers if they wish to organize themselves so. IEP is a separate task to be conducted by the subcontractor.

However, for accountability and contract management purposes, where bidders propose a panel (not for if EIT Climate-KIC elects to create a panel) there must be one party, leading the bid, signing the contract and then managing (and accountable for) the other members on the panel.

## 5- Clarification on the knowledge of the Slovenian language

Knowledge of the Slovenian language (both spoken and written) is not a necessity, all work and workshops will be conducted in English.

## 6- Prolongation of the deadline on request

Please note that the deadline for submission of quotes has been extended by a week and the expected timelines for this RFQ are adjusted accordingly:

<b>Planned Date*</b>	<b>Milestones</b>
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