

# Request for Proposal

**For:** Request for Quotation for EIT HEI Capacity Building Initiative – Monitoring, Evaluation and Learning (MEL) Framework and Theory of Change (ToC) Refresh

**Date:** 2.07.2024

## 1 Overview

### 1.1 Executive Summary

This is a Request for Proposal (RFP) 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	Request for Quotation for EIT HEI Capacity Building Initiative MEL Framework and Theory of Change Refresh
The legal entity requesting these goods and/or services	Climate-KIC Holding B.V.
Services and/or goods will be delivered to the following locations	Services will be delivered remotely
EIT Climate-KIC Contract Manager for submitting proposals and inquiries	Milijana Merdovic EIT HEI Initiative MEL Officer eit-hei@climate-kic.org
Proposed contract term for successful candidates	10 months

### 1.2 Timelines

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

Planned Date*	Milestones
2/07/2024	RFP issued to bidders
26/07/2024	Deadline for bidders to submit questions on the RFP
01/08/2024	Bidders submit proposals / Submission Deadline
8/08/2024	EIT Climate-KIC team to review proposals EIT Climate-KIC to gain clarification from bidders
12/08/2024	Notification of contract award
01/09/2024	Proposed contract signature

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

### 1.3 How you can participate

1. Review the RFP documents provided by EIT Climate-KIC.
2. If you have questions on the RFP, email the Contract Manager at least 5 business days before the submission deadline. We aim to respond in a timely manner wherever possible.



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3. Submit a proposal following the requirements at Section 6 by the Submission Deadline stated at Section 1.2.
4. EIT Climate-KIC will assess bids and notify bidders following the timeline at Section 1.2.

#### 1.4 About EIT Climate-KIC and the EIT HEI Initiative

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.

#### EIT HEI Initiative: Innovation Capacity Building for Higher Education

[The EIT HEI Initiative](#) is part of the EIT – the European Institute of Innovation and Technology. The EIT exists to drive innovation across Europe by integrating business, education and research to find solutions to pressing global challenges. The EIT's eight Innovation Communities – Knowledge and Innovation Communities or 'KICs', – exist as independent consortia putting this mission into practice across nine strategic priority areas for Europe.

To date, the Innovation Communities have worked with university partners to create substantial impact in boosting innovation in their areas of focus. This has taken place principally at faculty or departmental level – for example, EIT Health working with faculties of biosciences or medicine, or EIT RawMaterials with materials science or geology departments. Now, under Horizon Europe, the EIT's Strategic Innovation Agenda 2021-27 envisages bringing this expertise to entire HEIs at the institutional level, while reaching out beyond EIT KIC partner universities with the aim of reaching 500 HEIs across Europe. To make this happen, the EIT HEI Initiative has been developed and is implemented by these eight innovation communities, with EIT RawMaterials leading the project.

The objectives of the EIT HEI Initiative are to:

- Strengthen innovation and entrepreneurial capacity of HEIs at institutional level, engaging all actors of the education value chain
- Enable meaningful engagement with innovation ecosystems      Empower people to transform ideas and expertise into tangible, societal value
- Create an entrepreneurial culture

The EIT HEI Initiative concluded its Pilot Phase in 2024 with 65 projects funded (consortia between HEIs, business, research bodies), over 40.000 students, academics and non-academics trained, and more than 1000 start-ups/scale-ups supported. Due to the remarkable achievements of the programme's pilot phase the EIT HEI Initiative has been extended with an EIT Governing Board decision until 2027.

EIT Climate-KIC is leading the work package on Monitoring, Evaluation and Learning (hereinafter also referred to as MEL). The overall MEL approach adopted by the EIT HEI Initiative is guided by the Regional Innovation Impact Assessment Framework (RIIA) as well as Blue Marble Evaluation, Developmental Evaluation, Horizon Europe Impact Pathways and nested within a high-level intent set under the EIT Strategic Innovation Agenda and EIT Impact framework. EIT HEI Initiative MEL approach follows a theory-based

impact-oriented M&E approach, to explain how, where, and why projects and the Initiative bring about success (or not) impact. Combines quantitative and qualitative methods to allow findings to be layered, to add depth, nuance, or attribute change as necessary. Draws key principles of developmental evaluation to engage those involved in delivering the program through sensemaking and learning and external evaluation.

## 2 Confidentiality

All information provided in this Request for Proposal (hereinafter “RFP”) 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 RFP. 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 RFP 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

### MEL FRAMEWORK AND THEORY OF CHANGE REFRESH PURPOSE

#### **The Change and the Challenge**

The process of change and impact is complex and different capacities (economic, institutional, governance and social) are needed to reinforce each other in a complexity that needs constant adaptation and evolution. That is why it is important to recognize and embrace complexity and empower the HEIs and their key stakeholders to focus efforts on most important restraints and opportunities to thrive.

EIT Climate KIC seeks a supplier to partner in the undertaking of an MEL framework refresh to improve and optimize the HEI Initiative through real-time feedback to program staff and iterative assessment to allow for a continuous and adaptive development process.

This reflective moment will serve the dual purposes of accountability and learning and adapting and amplification to achieve EIT HEI Initiative primary stated objectives and intended systemic impact.

The refreshment is seen as a developmental process conducted during program implementation, with the objective of using findings to refine the HEI Initiative MEL processes and inform EIT HEI Initiative planning and process adjustments for future program implementation, forthcoming funding rounds as well as beyond the Initiative funding.

## 4 Specification

### 4.1 Scope

EIT Climate-KIC is requesting proposals for **MEL Framework and Theory of Change (hereinafter also referred to as ToC) Refresh** that will include vision remind/refresh, EIT HEI Initiative Impact Pathways and signs of change refresh, KPIs alignment the current needs of the EIT HEI initiative and future developments in the field of capacity building of HEIs for innovation and entrepreneurship as well as updating/aligning to the EIT HEI Framework.

The refresh should collate and analyze learnings and best practices, assess the EIT HEI initiative Impact pathways, identified actions, and indicators to support the Initiative's role in positioning HEIs as leading organizations in entrepreneurial and innovation capacity building. The MEL Framework refresh is seen as a process of support to the Initiative to assess and refresh its potential to achieve systemic impact and test the hypotheses and assumptions laid out in the Theory of Change and MEL Framework, as well as to propose modifications to the EIT HEI Initiative Theory of Change, as necessary.

The proposal should consider the following objectives:

- I. Vision Remind/Refresh.**
  - HEI Vision until 2025 and 2025-2027, and beyond. A common understanding of the impact we wish to achieve - cultivate a common understanding of “strengthen the innovation and entrepreneurial capacity of an HEI” and “integrate into innovation ecosystems.”
- II. Stakeholder engagement/Consultation process.**
  - HEIs needs/problems/opportunities Baseline – HEI Innovate. Insight of the experience using HEInnovate and the value of HEInnovate for the HEIs. Proposal for other possible solutions.
  - Understand HEIs ideas on pathways and actions, ideas that can come from Top management but also from bottom-up (due to experience in strengthening institutions).
  - Engagement with Industry and public bodies.
  - Identify possible rubrics for impact evaluation.
- III. HEI initiative Impact Pathways/Domain-Action-Impact Framework Refresh**
  - Update the Domains and Actions by validating current Domains and Actions, but also introducing new Domains and Actions and/or removing Domains and Actions. Focus on Domain 5 and overlapping across Domains.
  - Signs of change refresh and update.
- IV. KPIs alignment and update**
  - Define/Update result and impact indicators per Action, aligning EIT (Core) KPIs. Understand if the current Indicators should be revised and which KPIs would best respond to measure and evaluate the 5 impact pathways with the focus on Institutionalization as a key Domain for the change to happen in all other Domains.
- V. Roles, Responsibilities, Processes Refresh**
  - Understand if we need different processes and responsibilities.

#### 4.1.1 Proposed Services and phases

A stepwise approach with frequent consultation with EIT HEI initiative MEL team, led by EIT Climate KIC.

##### a) Desk based research – rapid review of relevant literature.

- **desk based research** to collect the main characteristics and factors influencing the entrepreneurial and innovation capacities of HEIs. The desk research should include relevant resources not only EIT HEI initiative documentation but also review of relevant academic literature and current trends to provide further insight into the key enabling and influencing factors that affect HEIs on the journey of becoming more innovative and entrepreneurial.
- **proposal of possible frameworks, metrics and relevant indicators** (SDGs, OECD education, etc...).
- **insight on existing similar programmes in Europe and beyond** that are in place and can help the Initiative to amplify its effects or for possible future connections.

##### b) Stakeholder consultations.

Suppliers may propose instruments and methodology. The Domain-Action-Impact Framework will be used to guide the consultation, also serve to identify new Actions which can emerge bottom up, with specific focus on change in institutions. The stakeholder consultation should include at minimum:

- **online survey.**
- **interviews with stakeholders** that cannot be engaged through the planned workshops, group discussions (**optional if needed**).
- **analysis of the results of the consultation**, identifying possible rubrics for impact evaluation.

##### c) Proposal for update of the EIT-HEI Domain-Action-Impact Framework with associated indicators.

Adapt/refresh the Impact Pathways Framework with a list of indicators to effectively track and measure the progress and benefits and communicate the impact of the new HEI initiative. Understand if the current KPIs should be revised and which indicators would best respond to measure and evaluate the 5 impact pathways with the focus on institutionalization as a key Domain for the change to happen in all other Domains and propose modifications to the EIT HEI Initiative ToC, as necessary.

##### d) Series of workshops (preferably online).

A series of virtual group discussions / workshops are foreseen to engage the KICs representatives and working group members in dialogue throughout the assignment. The WSs should be organized after the desk review and the survey with two main objectives. First, evaluate and determine best practice and how they can be used to drive change at the institutional level, based on the practices collected. Second, discuss proposed refresh the MEL Framework Impact Pathways, actions, and the indicators proposed. The supplier should be responsible of:

- **Workshop framing and design** together with the EIT HEI initiative MEL Team and present the progress.
- **Workshop moderation and co-facilitation**, as needed.

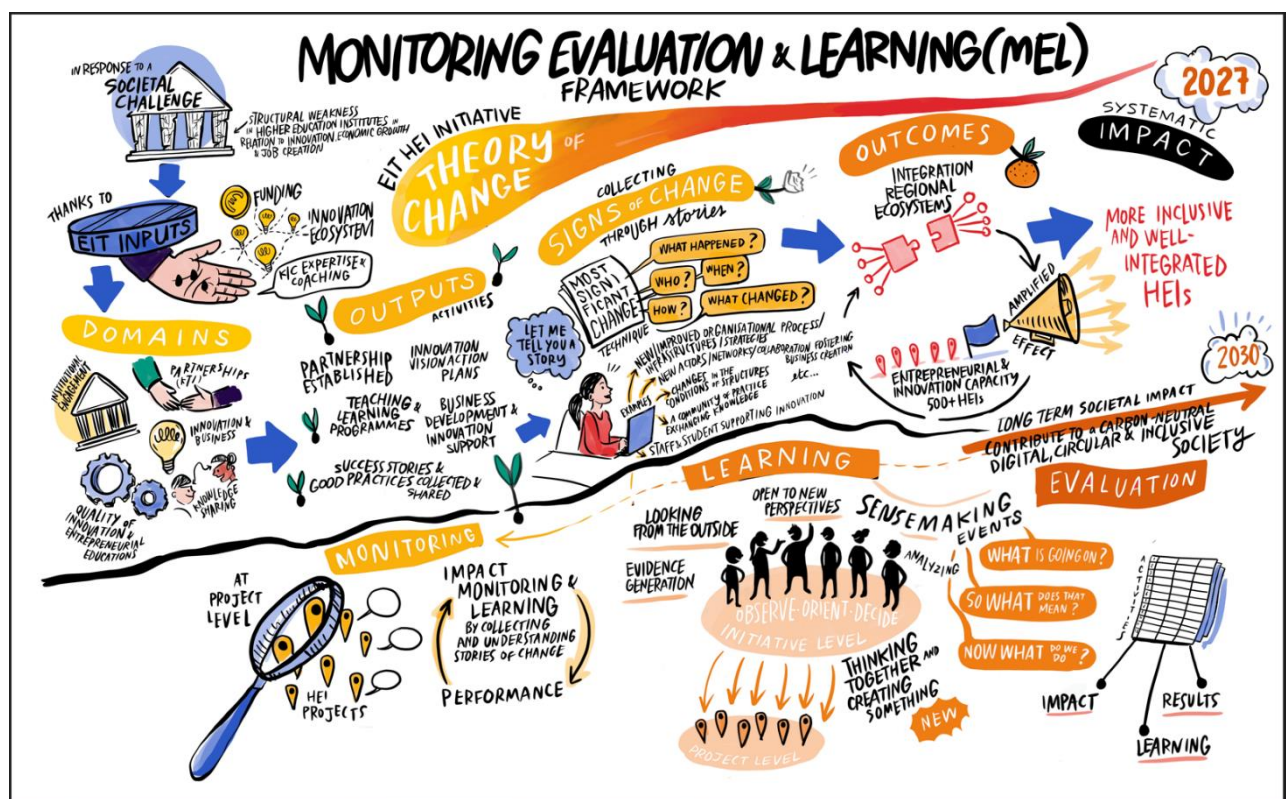
##### e) Refresh MEL Framework

- **Purpose and the Scope** (MEL principles and approaches);
- **MEL frameworks components:** HEI Initiative Theory of Change, Monitoring Frameworks (performance monitoring and impact monitoring), Evaluation Framework.
- **MEL system** (roles, responsibilities, processes).
- **Domain Impact Pathways: Actions.**
- **Indicator Framework.**

Here you can find the visual representation of the EIT HEI Initiative's ToC6. It illustrates the logic of how the Initiative intends to deliver the Initiative's outputs and stimulate medium- and long-term outcomes to contribute to systemic and long-term societal impact. The top and the bottom sections of the visual features the societal challenge the EIT HEI Initiative attempts to address as well as the internal and external factors that may have an impact on the trajectory towards outcomes and impact.

For a full **EIT HEI Initiative Framework** please refer to the Contract Manager the pdf version via e-mails stated in the [section 1.1](#).

Figure 1 EIT HEI initiative MEL Framework



#### 4.1.2 Assign and Implementation Process

The assignment is structured along three phases.

- Phase 1 – Inception and foundation
- Phase 2 – Implementation
- Phase 3 – Final reporting

The three phases are built around the five key types of activities as described below; possible additional activities needed to implement the key activities should be detailed in the proposal:

The proposal should include:

- Methodology and Workplan, Timetable, including Ghant Chart including phases and activities
- Identified key milestones of the assignment

- Suggested team members
- Resources/Budget detailed per phase, activity, days and fees.

More details on requirements are provided in [Section 6](#).

The refresh process should be a participatory and collaborative approach between the Supplier and the Climate IC HEI initiative MEL team. Regular consultations and/or touchpoints should be incorporated into the assignment design from project inception to the assignment's completion.

#### 4.1.3 Key Stakeholders

The key stakeholders in the HEI Initiative include, identified by the EIT HEI Initiative:

- EIT KIC HEI Initiative Staff and Education Directors - EIT HEI Initiative Project Staff.
- HEIs (top management, academic staff and external academic actors).
- Project Consortia Coordinators.
- Consortia Partners.
- Supported start-ups and scale-ups, and KIC graduates and participants in professional and other training courses (Beneficiaries: students, non-academic staff, SMEs).
- Other stakeholder (industry, public, bodies, civil society, etc).

The services will be delivered to meet the following project milestones. Specific description of each item is provided in [Section 4.3](#).

Milestone	Time frame
1. Desk review completed	15 October 2024
2. Stakeholder consultation completed	15 November 2024
3. Insights from the Consultation incorporated in Domain-Action-Impact Framework and approved, WS/s agenda and methodology approved	1 February 2025
4. WS/s conducted	10 February 2025
5. Feedback on the MEL Framework Refresh incorporated	1 April 2025

## 4.2 Methodology

The MEL Framework refresh is meant to be responsive in shaping HEI Initiative learnings and processes for the future. For this reason, HEI Initiative encourages methodological flexibility, the use of both qualitative and quantitative data collection and analyse techniques, and the use of creative and agile approaches to conduct the refresh process. The supplier is expected to present a detailed proposal for methodologies that respond to the specific objectives listed above. The inception report should include a detailed matrix and a description of the proposed methodological approach. Data to be collected from existing documents, via online survey instruments. Qualitative techniques to combine a dive into existing documentation, content analysis of the evidence, open and semi-structured interviews with internal and external stakeholders in consultation with Climate KIC (where needed), deep dives are also recommended to better understand perspectives and experiences.

The refresh of the MEL Framework should incorporate the participation of EIT HEI Initiative staff, key program partners, beneficiaries, other stakeholders. Tools and specific methodological approaches will be discussed and agreed between HEI Initiative MEL team and the supplier (suggested desk analysis, KIIs,

survey, deep dives). None of the reports produced under the present contract shall be shared externally without EIT Climate KIC prior written approval.

### 4.3 Deliverables

The following deliverables are requested:

**Deliverable 1: Workplan, by 20 September 2024.**

Requirements: A detailed workplan that outlines the methodology, instruments, deliverables, roles, responsibilities and timelines.

**Deliverable 2: Inception report, by 15 January 2025.**

Requirements: Following the Desk based research and Stakeholder consultation the supplier will prepare inception report and revise the report following feedback from HEI Initiative. The Inception Report should include, at minimum:

- Analyses of the Desk based research to collect the main characteristics and factors influencing the entrepreneurial and innovation capacities of HEIs.
- Proposal of possible frameworks, metrics and relevant indicators (SDGs, OECD education, etc...).
- Insight on existing similar programmes in Europe and beyond that are in place and can help the initiative to amplify its effects or for possible future connections.
- Analysis and results of the Online survey (minimum 40 universities respondents)
- Analyses of the Interviews if needed (in agreement with Climate-KIC)
- Synthesis of the results of the consultation, identifying possible rubrics for impact evaluation.

**Deliverable 3:**

**Del 3a: Draft written proposal Domain-Action-Impact refresh, by the 1 February 2025.**

Requirements: Based on the Inception Report:

- a detailed Draft proposal Domain-Action-Impact Written Proposal should be prepared including indicators updates and will serve as base for the continuation of the consultation process.

**Del 3b: WS Report, by the 15 February 2025**

Requirements: Based on the WS/s conducted a detailed WS report should be prepared including the agenda, design and methodology, insights form the WS/s.

**Deliverable 4: Draft MEL Framework Refresh, by the 15 March 2025**

Requirements: Based on the Inception Report (Del2), Draft proposal Domain-Action-Impact refresh (Del3) and following the WS/s with key stakeholders and HEI Initiative staff.

- A detailed refreshed MEL Framework should respond to the objectives of the assignment stated above.



### **Deliverable 5: Final MEL Framework refreshed, 15 April 2025**

Requirements: The new MEL proposal should include:

- Production of final MEL Framework, proofread 2 versions: 1 full version including:
  - Purpose and the Scope (MEL principles and approaches).
  - MEL frameworks components: HEI Initiative Theory of Change, Monitoring Frameworks (performance monitoring and impact monitoring), Evaluation Framework.
  - MEL system (roles, responsibilities, processes)
  - Domain Impact Pathways: Actions.
  - Indicator Framework.
- MEL Framework short 1-pager version.
- Slide deck covering the main points of the Framework refresh including purpose, methods, findings, conclusions, recommendations, and additional notes relevant to the MEL Framework refresh process.
- Optional: Suppliers are welcomed to include in their proposal Graphic design, branding and illustrations – as an example you can check [Transformation with urgency](#) (specific EIT HEI Initiative branded guidelines will be provided upon signature of the contract) and subcontract for this service is allowed.
- Optional: Additional creative communication products for dissemination are highly appreciated (briefs, infographics, videos –as an example [https://youtu.be/m58lgS0z810?si=St\\_S75bxTzyLT4Oo](https://youtu.be/m58lgS0z810?si=St_S75bxTzyLT4Oo) etc). Subcontracting for this service is allowed.

### **Deliverable 6: Final Report, by 15 May 2025**

Requirements: Final Report including a two to three-page executive summary, and a set of annexes. The report should include details and document the process of the EIT HEI Initiative MEL Refresh. The report should include:

- Slide deck.
- Desk research report.
- Survey/interviews analysis.
- WS/s report.
- Proposal for Rubrics for Impact Evaluation.

The report should be formatted as per EIT HEI initiative Guidelines.

Report will be requested to be written at a suitably professional standard using a recognised (or specified) referencing style upon request. 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 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 Service Level Requirements

In providing goods and/or services to EIT Climate-KIC, the following service levels are requested:

- Services are requested during business hours 9am to 6pm CET excluding public holidays.
- Services may be required outside general business hours and flexible working arrangements are requested.
- The provider is to propose a suitable service level agreement to ensure key elements of goods and/or services delivery are defined, aligned and tracked over time. This should include escalation channels, performance indicators / targets and mechanisms for remediation of ongoing missed performance targets (e.g. credits, rebates or reimbursement).
- The service provider should be generally contactable and responsive during business hours by phone or email.
- Services should be delivered by professionally competent and appropriately experienced individuals.

#### 4.5 Goods & services

1.1 The quality of the goods, materials, standards and techniques in providing the goods are expected to ensure their ongoing use over a multi-year period. All goods and services supplied or transferred to EIT Climate-KIC must be free from defects in workmanship.

Successful bidders must ensure the goods or services conform with all descriptions and specification provided by EIT Climate-KIC are fit for any purpose that EIT Climate-KIC explicitly or implicitly makes known to the bidder.

#### 4.6 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.

In the efforts to procure in a sustainable manner with minimal impact, the following requests are made of the bidder:

- The services are to be delivered digitally following a paperless policy
- For events and workshops, please strictly minimise the generation of paper and plastic waste. Please discuss the use of brochures, paper agendas, poster boards and post-it notes with EIT Climate-KIC.
- We ask our service providers to consider the greenhouse gas emissions from transport to our offices and events. Cycling, walking, public transport and rail are preferable over air travel wherever possible.
- We love to hear what suppliers are doing to minimise impact. Feel encouraged to share your approach and policies if applicable.

#### 4.7 Eligibility

EIT Climate-KIC reserve the right to reject proposals 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.

#### 4.8 Required Experience and Capabilities

The team or individuals delivering the services should be able to demonstrate the following experience and capabilities:

- Appropriate skills, including expertise in monitoring, evaluation, and learning in complex programmes with big partnership network.
- At least one member of the team (i.e. the team lead) should have a postgraduate qualification in social sciences, evaluation, development studies, or other relevant discipline. Other qualifications may also be considered along with relevant experience.
- Strong understanding of the innovation ecosystem and technical experience developing and implementing MEL specifically for entrepreneurship, innovation and educational programmes.
- Strong understanding of and experience employing formative and developmental evaluation approaches, methodologies, tools and outputs.
- The multi-disciplinary team would combine different competencies and expertise in data generation, analysis, and high-level expertise in reviewing and processing a large number of documents, using appropriate technology in data collection and analysis and communication of complex concepts.
- Strong analytical, writing and reporting skills, as well as the ability to translate large volumes of information into comprehensive and user-friendly outputs for MEL and non-MEL public.
- Understanding of and/or specific experience working with various funders as well as EC.
- Prior experience working on evaluation of programmes in Europe and RIS Countries.
- Skills on high-quality analysis, reporting in English and time management for timely deliverables submission.
- Fluency in written and spoken English.

#### 4.9 Payment & Invoicing

- Payments will be made following 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.

- Where EIT Climate-KIC is requesting services over longer periods of time, we ask that bidders invoice in a pay as we go model (e.g. billed on a monthly consolidated invoice based on work completed or completion of 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.
- If submitting invoices for subscription services, please ensure these fees are itemised and priced at line level.

#### 4.10 Contract Management

A one-off agreement is proposed for award of work.

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 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 (VAT incl.)	40%
Quality – suitability and capability of the proposed services to deliver the scope and requirements in the Specification as evidenced by its proposal.	30%
Experience and Capabilities – ability to meet the requirements as evidenced by its proposal	30%
<b>Total</b>	<b>100%</b>

## 6 Instruction to Bidders

## 6.1 Responding with your proposal

All prospective suppliers shall submit an offer to EIT Climate KIC illustrating how they would implement the description of work illustrated above, within the specified time frame, including the necessary budget. Please include, also, evidence on your experience to conduct Developmental Evaluations would be a plus. EIT Climate-KIC are requesting the following are submitted to bid on this contract:

1. **Technical Proposal**, which includes the following components:
  - Overall approach and methodology and clear timeline. The proposed technical approach should be aligned with the objectives and scope outlined in the Terms of reference
  - Personnel deployed that meets the requirements described in [Section 4.8](#).
  - Demonstrated experience in similar refresh or revision of MEL Frameworks processes. (sample of work to be provided, or link).
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 RFP responses that do not confirm with these guidelines.

**All responses shall be made to the Contract Manager (refer [Section 1.1](#)) via electronic copy/email.**

## 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.
- Include all applicable costs or charges associated with providing the goods and/or services in your quotation.
- Please quote on a company letterhead or similar company form where possible with the resolution described in [Table 1](#) at a minimum. Where a resource plan can be provided or explicitly requested, please refer the example in [Table 2](#).

**Table 1:** Provided quotations to include the following details

Item and unit cost (in Euros excluding VAT)
<b>Services requested as per <a href="#">section 4.1.1</a> proposed services and phases:</b>
<b>Deliverables as per <a href="#">section 4.3</a></b>
<b>License fees (per user per month/annum, and in aggregate) if applicable</b>
TOTAL (if applicable)
Rate card for services (per day/hour, in Euros excluding VAT):
Add/delete the roles you consider appropriate

Item and unit cost (in Euros excluding VAT)
<ul style="list-style-type: none"> <li>• Assistant – XX / day</li> <li>• Officer – XX / day</li> <li>• Specialist - XX / day</li> <li>• Project coordinator – XX / day</li> <li>• Facilitator – XX/day</li> <li>• Partner – XX/day</li> <li>• ...</li> </ul>

**Table 2:** Example resource-based quotation for proposed labour

Section	Area	Resource	Task	Quantity (days)	Resource day rate (EUR excl. VAT)	Subtotal cost (EUR excl. VAT)
Service delivery	Workshop facilitation	e.g. Facilitator	e.g. Workshop preparation and delivery	e.g. 3	e.g. € XX.00	e.g. € XX.00
		e.g. Facilitator's assistant	e.g. Workshop delivery support	e.g. 1	e.g. € XX.00	e.g. € XX.00
...	...	...	...	...	...	...
<b>Grand total</b>						€ XX.00

### 6.3 Subcontracting guidance

It is not anticipated that the delivery of these services will require subcontracting

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 name and address (address is not required for an individual).

EIT Climate-KIC require at least one relevant reference including the name and phone number of a current contact within that organisation.

### 6.4 Terms of this RFP

1. Your proposal 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 proposal submitted outside the scope defined may be rejected without provision for re-submission.
2. Any further information pertaining to this RFP, of whatever nature, must be directed to the Contract Manager detailed in Section 1.1. If a point of clarification materially affects the RFP, 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 RFP, a clear statement should be made on the assumptions taken to arrive at your quoted costs, or alternatively contact us prior to submitting your proposal to seek clarification.
4. Entering into contractual arrangements with EIT Climate-KIC in connection with this RFP does not guarantee work will be awarded.
5. EIT Climate-KIC reserves the right to reject any proposal(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 proposals 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 proposal 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 RFP by return email to the Contract Manager detailed in Section 1.1 confirming whether they intend to submit a proposal by the Submission Deadline.
11. This RFP does not commit or obligate any EIT Climate-KIC company to pay any expenses incurred by you in the preparation of your Proposal. All such expenses are solely at the risk of the bidder and by submitting a proposal you automatically agree that proposal becomes the property of EIT Climate-KIC.
12. Additional services related to this Scope may be requested on a day rate basis. Please ensure a rate card is included with your submission and any other applicable costs associated with supplementary services.
13. The supplier will ensure sufficient financial, economic, technical and professional capacity to deliver the services in an efficient and effective manner.
14. Proposals are to be kept as clear and concise as possible and should be sequenced and numbered in accordance with the format of this RFP.
15. The formatting of this document and the attached response document should not be altered.
16. Whilst this RFP 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.
17. Unsuccessful bidders agree, by the submission of their proposals, to return to EIT Climate-KIC this RFP and any and all papers, records, data and materials supplied to them in connection with it, including all copies made by them.
18. This RFP is for consideration in whole and not in part or parts unless otherwise indicated.
19. All efforts have been made to ensure the accuracy and validity of information contained in this RFP. However, EIT Climate-KIC does not warrant the information accurate or comprehensive.