

# Request for Proposal

**For:** Portfolio Innovation Data Lab

**Date:** 24 July 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	EIT Climate-KIC is seeking an innovation partner, with relevant knowledge and expertise, to co-develop and prototype a Portfolio Innovation Data Lab with advanced AI capabilities to support the identification of data-driven insights, opportunities, and recommendations, as part of its Systems Innovation as a Service platform offering.
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	Will Wade <a href="mailto:will.wade@climate-kic.org">will.wade@climate-kic.org</a>
Proposed contract term for successful candidates	Circa 12 August – 31 December 2024

### 1.2 Timelines

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

Planned Date*	Milestones
24 July 2024	RFP issued to bidders
Within 2 business days of receiving this RFP	Bidders to confirm they will respond to RFP
1 August 2024, 17:00 CEST	Bidders submit quotes / Submission Deadline
2 August 2024	EIT Climate-KIC team to review Proposals EIT Climate-KIC to gain clarification from bidders
5 August 2024	Notification of contract award
8 August 2024	Alcatel Period Closes.
12 August 2024	Proposed contract start date

\* 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. 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 RFP, 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 "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

EIT Climate-KIC is Europe's leading climate innovation agency and community, supporting cities, regions, countries and industries to meet their climate ambitions through systems innovation and place-based

transformations. EIT Climate-KIC's mission is to catalyse systemic change for climate action through innovation. Our approach is holistic and systemic and place-based. We integrate sustainable economic development, social change, new institutions and technology solutions to advance climate mitigation, adaptation and environmental regeneration. We see these elements as interdependent. Together with our partners, we generate, implement and integrate climate solutions by mobilising finance, testing business models, and opening pathways for institutional change and behavioural change.

Our 2019-2022 Strategy focused on designing, developing, combining and deploying innovation approaches to catalyse systemic change by matching a growing demand for change with a supply of solutions. We created the conditions for intersectoral approaches that lead to changes in policy, regulations, infrastructure, procurement, and planning and design as well as logistics and supply chain transformation and social and behavioural shifts in perception, demand and awareness. Our '**systems innovation as a service**' model is delivering positive change scaled to cities, regions, countries, communities and industry value chains. It is designed to support and implement outcome-led or mission-led approaches to transformation, grounded in the contexts where change can be seen and community-led.

We lead consortia of partners implementing the EU Mission Climate Neutral and Smart Cities, EU Mission on Climate Adaptation and EU Mission 'A Soil Deal for Europe', supporting over 100 cities and 150 regions across Europe to deliver on breakthrough climate goals. We have developed Deep Demonstrations of change in Ireland, Spain, and Slovenia, and in industrial value chains in Spain and Poland. We work with local partners throughout the world, with a particular focus on Africa and Latin America to build innovation ecosystems that support local development of solutions in the Global South.

Our innovation portfolio creates compelling investment opportunities that include single investable assets such as start-ups and projects as well as strategic investment portfolios that span multiple asset classes and are designed to catalyse the transformation of specific systems. Together with our community and partners, we empower the transition. We incubate. We implement. We create the conditions to shift mindsets and behaviours, to stimulate decision makers and investors to act. We build skills to accelerate learning and to identify where innovation can best transform systems and bridge siloes. This is EIT Climate-KIC's work of orchestration.

### **The Portfolio Innovation Data Lab experiment opportunity**

The Portfolio Innovation Data Lab is an innovation and experimental initiative that will use large portfolio datasets and generative AI, combined and synthesised this with publicly available data relevant to the portfolio initiatives/data, to support the identification of data-driven insights, opportunities, and recommendations, as part of EIT Climate-KIC's **Systems Innovation as a Service platform** offering.

The selected innovation partner will work with EIT Climate-KIC to design, develop, and test a data-driven and AI-augmented approach using existing data in/from EIT Climate-KIC's portfolio of projects and programmes, and complementary EIT Climate-KIC-supported start-up and innovation portfolio data. The experiment will explore and demonstrate the feasibility of a digital platform to synthesise and augment existing data to surface data-driven actionable intelligence, identify and promote innovation opportunities, foster radical collaboration, and increase impact.

The experiment will explore the opportunity for, and viability of, a scalable (across the EIT Climate-KIC portfolio and beyond) and commercialised digital tool and methodology, with intellectual property rights retained by EIT Climate-KIC and deployable as a key component of the Systems Innovation as a Service platform.

The selected partner will bring deep knowledge and expertise of digital and AI technical systems build, data/AI-driven innovation, and product development / commercialisation.

## 4 Specification

### 4.1 Scope

EIT Climate-KIC are requesting a proposal and quotation for an Innovation Partner with relevant knowledge and expertise to co-develop and prototype a Portfolio Innovation Data Lab with advanced AI capabilities, to support the identification of data-driven insights, opportunities, and recommendations, as part of its Systems Innovation as a Service platform offering.

The Innovation Partner will work with EIT Climate-KIC between August and December 2024 to develop a data-driven and AI augmented digital tool/platform prototype in an experimental environment, utilising existing EIT Climate-KIC portfolio data in combination with publicly available data..

The Innovation Partner will be required to develop the technical infrastructure and platform for a prototype tool as well as act as an innovation partner in the co-design and delivery of the Data Lab. As such, the Innovation Partner will need to be able to combine technical knowledge and skills with deep digital-enabled innovation expertise and product/commercialisation/business model development experience, particularly as they relate to data and AI-driven innovation.

EIT Climate-KIC will provide:

- A server on which the Data Lab prototype can be built and hosted.
- Access to existing data warehouse.
- Relevant EIT Climate-KIC portfolio data (both public and confidential, and primarily from its Cities portfolio) to undertake the experiment with.
- Engagement with key stakeholders and users of the resulting prototype, to support UX and use-case development.

The selected Innovation Partner is expected to source relevant digital tools and software licenses to undertake the experiment and hosted on the EIT Climate-KIC provided server/data warehouse. Any one-time or recurrent costs for such tools/licenses should be specified in the bid and contained in any product development and commercialisation plan.

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

As the innovation experiment is expected to be an iterative and explorative process, concrete milestones have not already been set as part of the Procurement; however, bidders are requested to include relevant milestones that may be linked to specific Deliverables (see below, section 4.3) as fits their methodological approach to fulfilling the scope of this tender.

### 4.2 Objectives

- Design, prototype, and test an experimental Portfolio Innovation Data Lab using public and confidential EIT Climate-KIC portfolio and start-up data, and augmenting this with publicly sourced (using advanced AI tools) information.
- Evaluate the efficacy and feasibility of the Portfolio Innovation Data Lab on the basis of the prototype, testing, and lessons learned, and establish its value-add to/for EIT Climate-KIC's Systems Innovation as a Service platform approach.
- Develop a product development road map and commercialisation strategy, building upon the prototype and experimentation phase learning.

### 4.3 Deliverables

Bidders are requested to respond with four to six (4-6) Deliverables as appropriate to their proposed approach/methodology, including one related to product development and commercialisation strategy.

Deliverables should be sequenced and will reflect the payment scheduled based on successful completion of each Deliverable in turn.

Note that the numbers of/references for Deliverables should align with pricing at Section 6.2.

Any written reports should be of a suitably professional standard using a recognised (or specified) referencing style upon request. The format and structure may be discussed during delivery of the work.

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.

Any reports and/or digital products or tools 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.

### 4.4 Service Level Requirements

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

- Services should be delivered by professionally competent and appropriately experienced individuals.

### 4.5 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.

## 4.6 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.

## 4.7 Required Experience and Capabilities

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

- Deep technical expertise in/working with large data sets and generative AI technologies/approaches.
- Experience in digital innovation and innovation through digital means/technologies; knowledge of systems innovation (including an appreciation and understanding of systems innovation in the context of EIT Climate-KIC's work).
- Experience in developing product commercialisation road maps and business models.
- Experience in acting as an innovation- / thought-partner.
- Adherence to evaluation professional ethics and quality standards
- Project and financial management showcasing on time and on budget delivery

## 4.8 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.

## 4.9 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.	40%
Ability of bidder to fulfil the scope of services, in a manner consistent with EIT Climate-KIC's objectives and those of this project (meeting the requirements at Sections 4.1 and 4.2), as evidenced by its Response.	25%
Methodology and approach – meeting the requirements at Section 4.3 as evidenced by its response.	10%
Experience and Capabilities – ability to meet the requirements at Section 4.7 as evidenced by its response.	25%
<b>Total</b>	<b>100%</b>

## 6 Instruction to Bidders

### 6.1 Responding with your Proposal

EIT Climate-KIC are requesting the following are 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.
  - o 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*).
  - o Include website links to examples of work previously performed by the bidder if applicable (e.g. portfolios, work products or other)

2. A **Proposal** that meets the requirements described at Section 6.2

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**

### 6.2 Quotation requirements

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

- 6.3 Please provide itemised quotations and specify if the quote includes / excludes VAT or any other taxes;
- 6.4 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.
- 6.5 Include all applicable costs or charges associated with providing the services in your quotation.
- 6.6 Please quote on a company letterhead or similar company form where possible with the resolution described in [Table 1](#) at a minimum.

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

Item and unit cost (in Euros excluding VAT)
• Services ... as per Section 4.1
• Deliverable 1 of ... as per Section 4.3
• Deliverable 2 of ... as per Section 4.3
• Deliverable 3 of ... as per Section 4.3
• License fees (per user per month/annum, and in aggregate) if applicable
TOTAL (if applicable)

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

## 6.8 Complaints handling

EIT Climate-KIC offers bidders a mechanism to foster transparency and enable procurement best practice.

Bidders have the right in this procurement procedure, within a reasonable time, to address questions, request additional information and obtain feedback, as well as submit complaints. Requests for information or clarifications and complaints will be directed to the contact person (the Contract Manager or other designated person) indicated in this Request for Proposal. EIT Climate-KIC reserves the right not to action complaints received after any applicable standstill period.

The Contract Manager will acknowledge, review and respond to complaints or clarifications presented by bidders in a reasonable time. EIT Climate-KIC reserves the right to conduct a procedural review, make changes to the published procurement documents or take other action in response to complaints at its discretion.

In the event of a serious irregularity in connection with this procurement, and after first exhausting the recourse of obtaining a reply from the contact person for this procurement, bidders and suppliers are referred to the channels outlined in EIT Climate-KIC's Strategy & Policy Anti-Fraud, Bribery and Corruption (refer whistleblowing) available at <https://www.climate-kic.org/policies/>.

## 6.9 Terms of this RFP

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 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 response 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 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 RFP 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 RFP 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 RFP.
13. The formatting of this document and the attached response document should not be altered.
14. 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.
15. Unsuccessful bidders agree, by the submission of their response, 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.
16. This RFP 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 RFP. However, EIT Climate-KIC does not warrant the information accurate or comprehensive.