

REQUEST FOR PROPOSAL

START-UP PROGRAMME – INVESTOR NETWORK

Overview

Programme

KAVA 1.5.2 – Start-Up Accelerator

Date Published

31-May-2017

Project Type

Innovation Ecosystem Development

Submission Deadline

23 June 2017

Delivery Period

July 2017 – December 2017 (6 months under EIT SGA 2017),
with a potential prolongation into 2018 under EIT SGA 2018

Target Group

Climate-KIC Core or Affiliate partners

Business Background

About Climate-KIC

Climate-KIC (“CKIC”) is the EU’s largest public private partnership addressing climate change through innovation. We educate students and experienced professionals on the challenges and opportunities of climate change; we develop, implement, and fund innovation programs and projects with leading climate innovators; and we incubate and accelerate climate-relevant start-ups. In so doing, we focus on four thematic priority areas: urban transitions, sustainable land use, sustainable production systems, and decision metrics and finance.

We deliver our activities through a partnership of more than 250 leading organizations from the public, private, and academic sectors, and with more than 150 staff in major cities across Europe. Founded in 2010, CKIC is supported by the European Institute of Innovation and Technology (EIT), a body of the European Union.

About Climate-KIC’s Start-Up Programme

CKIC runs Europe’s largest ideation, incubation, and acceleration program for climate-relevant start-ups. In 2016, we incubated almost 250 business ideas across 14 European countries through our own staff and through program delivery partners.

Task & Responsibilities

We are looking for a CKIC Partner Organization¹ to lead the development of an Investor Network for our start-up programme ("Project"). By systematically connecting our start-ups with the investor community, CKIC will be able to add value beyond the financial support and acceleration services currently offered.

The Partner Organization selected for this work will report to the Start-Up Programme Board and the Start-Up Programme Coordinator and work closely with the Accelerator Leads in the CKIC locations and within our program delivery partners.

Project Phases

The Project will be carried out in two phases. Phase 1 focuses on the preparatory, design and development work required to establish our Investor Network offering. Phase 2 focuses on the implementation of the activities and the continuous improvement of the Investor Network offering in 2017.

Phase 2 may be continued into 2018 under EIT SGA 2018.

Key Responsibilities & Work Packages

Phase 1: Preparatory, Design and Development Work

- A) Develop a Theory of Change behind the Investor Network
 - Describe and visualize the logic model behind systematic matchmaking between start-ups with investors
 - Conduct an information and engagement needs assessment for start-ups and investors
 - Develop a measurement and evaluation framework to assess the effectiveness of the Investor Network
- B) Establishing the database and portal infrastructure to connect investors with start-ups
 - Establish a database system to publish start-up investment information to registered investors, based on Climate-KIC's *Salesforce* CRM and data capture system fed by CKIC's Accelerator Leads
 - Develop an Accelerator Lead user and data maintenance manual and guidelines to enforce a consistent process for managing and curating data
 - Develop an intelligent analytical model (filter) to provide intelligence for making sense of the start-up data and assure data quality to investors
- C) Bringing data to life by establishing a user-friendly investor-facing online portal
 - Clarify privacy and data protection requirements and ensure legal compliance
 - Deliver an online platform with database search function and investor personalisation profile and account
 - Develop and implement offline offerings (e.g. digest reports and account management reports)
 - Direct Accelerator Leads to load and curate data
- D) Partnership set-up with investors (principles of engagement)
 - Design a value exchange model (money, mentoring, etc.)
 - Design the contractual set-up and business model (e.g. membership fees)
 - Prospect and formally engage investors
- E) Account Management/Service Model
 - Design investor and Accelerator Lead account management and servicing models (incl. definition of staff roles, service packages, deliverables, etc.)

¹ The organization must be a Core or Affiliate Partner of Climate-KIC, must have a Partnership Agreement with the Climate-KIC Holding B.V. that is operative at the time of submitting the Proposal and remains operative during the Delivery Period, and must have acceded to the Framework Partnership Agreement (FPA) with EIT prior to submitting the Proposal.

Phase 2: Bringing the Investor Network to Life

F) Events

- Design and deliver an Investor Network launch event in Q4 2017
- Design a mechanism for integrating the Investor Network with the Venture Competition 2017 and work with the Venture Competition organiser to deliver this
- Devise a long-term plan for local events and international events for 2018

G) Marketing and Operations

- Plan for prospecting and on-boarding new investors beyond 2017
- Plan for engaging community beyond 2017
- Plan for managing staff resources to load and curate start-up content and work with Accelerator Leads beyond 2017
- Plan for system improvements and operational roll-out beyond 2017

H) Partnerships

- Consider partnership models for the Investor Network (e.g. Cleantech Group, Climate LaunchPad etc.)

Project Set-Up

Once the Proposal is approved, the Partner Organization will be invited to submit a Task Confirmation (TC), which will be jointly developed with Climate-KIC. This TC will describe the specific work undertaken in the Delivery Period (2017 only) and any KPIs and Deliverables to be produced for reporting purposes.

Once submitted, the TC will be reviewed by Climate-KIC Holding B.V. ("BVH") and BVH will determine whether to include the Project in KAVA 1.5.2 Start-Up Accelerator.² This KAVA is set out in Annex 1 of the applicable Specific Grant Agreement (SGA) agreed between The European Institute of Innovation and Technology (EIT) and BVH (on its own behalf and on behalf of Partner Organisation and others). If the TC is approved, BVH will then issue a Project Confirmation Letter confirming that the Project will be included in the KAVA mentioned above.

The task confirmation will be issued with a maximum EIT contribution of EUR 125'000 (incl. for covering indirect costs as defined in the Horizon 2020 Financial Guidelines). While there are no strict co-funding requirements, the ability to contribute co-funding to the Project will be part of the selection criteria (see below).

The Partner Organisation will file a performance and cost report as part of the year-end reporting process under the conditions set out in this document and in the TC.

Any inclusion by BVH of the Project in KAVA 1.5.2, pass through of EIT cost reimbursement and any other BVH (and group) activity and support is subject to the following agreements and terms and conditions:

- The TC will be completed as per the Proposal (subject to any conditions and agreed amendments),
- The Project is executed as detailed in the Proposal (as amended) and TC and must pass stage reviews and other in-year evaluations, and
- Partnership Agreement between BVH, Partner Organisation and others (such agreement to remain operative for the duration of any BVH activity and support).

If included in a KAVA, EIT's reimbursement of the costs incurred in connection with the Project and any other activity or support is subject to the following agreements and terms and conditions:

- Framework Partnership Agreement between EIT and BVH, as acceded to by Partner Organisation and others,
- Applicable Specific Grant Agreement(s) between EIT and BVH (on its own behalf and on behalf of Partner Organisation and others).

² KIC Added Value Activity – a term specified by EIT in accordance with Article 2(11) of the Consolidated EIT Regulations

Please refer to the documents, guidelines and other material communicated by BVH (on its own behalf and on behalf of EIT) from time to time including as published on <http://www.climate-kic.org/partner-information-page/>

Selection Criteria & Process

Proposals will be graded on a scale from 1 (poor) to 5 (excellent) in the following areas:

- Skills and experience (30% weight)
- Execution strategy (30% weight)
- Project controls (20%)
- Ability to contribute co-funding (20%)

The proposals will be reviewed by Climate-KIC's Start-Up Programme Board. Announcement of the outcome can be expected within 3-4 weeks of the submission deadline.

Submission Instruction

Please submit your proposal, using the specific Project Proposal Form available from the CKIC Website (<http://www.climate-kic.org/calls-for-proposals/>), by **23 Jun 2017** to pinar.goksu@climate-kic.org. Applications can be submitted at any time from the launch of the call to the closing date. The proposal must be submitted in pdf format.

Please note: No extensions will be granted under any circumstances. Any changes to the proposal requested by the applicant after submission will not be allowed. CKIC has a responsibility to ensure that any public funding it provides is used for its approved purposes and that, when an organisation receives funding, it is used appropriately. The information that is requested is required to verify that projects are set up and planned effectively by the organisation(s) receiving funding. Please ensure that all the information requested in the Proposal Form is provided. Without the availability of the relevant information, the application will not be progressed.

Other Information

Avoiding duplicate funding: If applicants are knowingly involved in any EU funded project (of a similar nature to your proposal) that is currently underway or pending approval, then details should be provided. Especially in instances that involve shared resources or shared outputs. e.g. same person working, similar outputs, using same equipment etc.) For further guidance, please contact your local CKIC Lead.

Conflicts of interest: Conflicts of interest should be declared by applicants before submitting proposals. Interests declared will be scrutinised by non-conflicted CKIC staff and drawn to the attention of members of the decision making board on funding (such members themselves should also not be subject to a conflict). Climate-KIC Terms and Conditions include a requirement for organisations to have effective processes in place to manage conflicts of interest. If new conflicts arise once an award has been made these should be declared and managed using the organisation's and Climate-KIC's established processes.

Language: All application documents should be written in English. Exceptions can be made for supporting documents, such as Letters of Intent, which could be written in one of the official languages spoken in the country the application is submitted. In order to be assessed by all reviewers, you may choose to provide a short summary in English. Climate-KIC reserves the right to request for a translation at any time.

