

Request for Proposal (RfP)

Industry 4.0 Transformation Service Pilot Project

September 2024, France

The deadline for offer submission was extended until 7th of October 2024 by 18h00 (CEST)

1. Context

EIT Manufacturing (EITM) is focused on promoting entrepreneurship, innovation, and education in the domain of Manufacturing. EIT Manufacturing brings together leading organisations along the entire value chain from smaller companies to larger industry, renowned academic and research institutions, as well as public sector organisations, to promote the transformation of manufacturing towards the digital economy, the circular economy and the decarbonization of industry by removing barriers to innovation, promoting talent and education, leveraging, and enabling technologies and exploiting big data.

EIT Manufacturing's strategy is designed to ensure that European industry can continuously innovate and is prepared to meet the ongoing green and digital transitions. EIT Manufacturing is an association under the law 1901 created in 2019. Along with the EIT Manufacturing there are 8 (eight) other Knowledge and Innovation Communities (KICs) with the aim to lead the action and create services across Europe, improving the competitiveness of European companies.

EIT Manufacturing is seeking proposals for a pilot project aimed at assisting manufacturing SMEs in their transition to Industry 4.0. This project involves conducting Maturity Assessments and facilitating workshops to develop transformation roadmaps. To ensure the success of this project, EIT Manufacturing is seeking a qualified supplier with expertise in Industry 4.0 methodologies and assessment techniques.

The chosen supplier will play a crucial role in delivering high-quality assessments, creating engaging marketing materials, and supporting customer engagement and onboarding. The ultimate goal is to provide manufacturers with actionable insights and roadmaps that will enable them to leverage the benefits of Industry 4.0 technologies effectively.

2. Description of the Services

EIT Manufacturing requires the following services from the supplier:

- **Certified Assessor:** The supplier must provide a certified license to conduct the maturity assessments and roadmap creation tasks.
- **Marketing Material Creation:** Develop comprehensive marketing materials for regional teams. These materials should include detailed information about the methodology used for the Maturity Assessment and the creation of an Industry 4.0 roadmap.
- **Customer Onboarding Support:** Assist with meetings to onboard customers and explain the requirements and processes for the workshops.
- **Lead Assessments and Workshops:** Conduct at least 3 Maturity Assessments and lead the creation of at least 1 Industry 4.0 transformation roadmap for selected manufacturing SMEs.
- **Collaborative Assessment and Next Steps:** Work closely with EIT Manufacturing to assess the results of the pilot project, provide recommendations, and help define the next steps for customers to implement their newly created roadmaps using EIT Manufacturing's offerings.

3. Deliverables of the Services

The selected supplier will be responsible for the following deliverables:

1. **Certified Assessor:**
 - A certified professional to conduct the Maturity Assessments, Roadmap creation tasks and access all relevant SW.
2. **Marketing Material:**
 - Detailed documentation on the assessment methodology.
 - Engaging and informative marketing materials for customer acquisition.
 - Guidelines for the creation of Industry 4.0 roadmaps.
3. **Customer Onboarding Support:**
 - Participation in meetings to explain workshop requirements and processes to potential customers.
4. **Assessments and Workshops:**
 - Conduct at least 3 Maturity Assessments for selected manufacturing SMEs.
 - Facilitate at least 1 workshop to develop an Industry 4.0 implementation roadmap.
5. **Collaborative Assessment and Next Steps:**
 - Joint evaluation of the pilot project results with EIT Manufacturing.
 - Recommendations for customers on leveraging EIT Manufacturing's offerings to execute their roadmaps.
 - Detailed report summarizing findings, feedback, and next steps.

5. Indicative Timeline

The indicative timeline for the RfP is as follows:

Activity	Responsible	Deadline
RFP opening	EIT Manufacturing	26 th September 2024
Offer submission	Suppliers	4 th October 2024 by 16:00 pm (CEST)
EXTENDED DEADLINE FOR OFFER SUBMISSION	Suppliers	7th October 2024 by 18:00 p.m. (CEST)
Evaluation and notification of award	EIT Manufacturing	9 th October, 2024
Standstill period for complaints	Supplier	from 9 th October to 14 th October 2024
Contract signature	EIT Manufacturing & selected Suppliers	15 th October 2024

The indicative timeline for the Project is as follows:

Milestones	When?
1. Project Kickoff <i>Kickoff meeting with regional centers</i> <i>Finalize supplier agreement</i>	End October
2. Customer Identification and Initial Delivery <i>List of potential customers compiled</i> <i>Initial outreach to the first customer</i> <i>Deliver service to 1st customer</i>	October – November
3. Ongoing Customer Identification <i>Acquisitions of additional customers</i> <i>Schedule and deliver services as customers are identified</i>	November-December
4. Pilot Evaluation and Next steps <i>Compile and share pilot report</i> <i>Plan for service scaling</i>	End December
5. Marketing Material Development <i>Create and finalize marketing materials</i>	Beginning of October – December

All offers shall be submitted within the above-mentioned deadline to the following link: <https://eit-manufacturing.prioritize.linksquares.com/new-task?token=eqfghK7Tdyco3ZdVaPfVagS5gx2LiEf2ImaueYxnGfUzCJhpKHMNjUwW1oN-KF7i>

To start your application, please follow the outlined “step-by-step”:

1. Click on the link above and then click on “Procurement - Make a request for the Legal Team related to Procurement Procedures”.
2. Fill out the Task Name with this description: “RfP – Industry 4.0 Transformation Service Pilot Project”.
3. Fill out the Requestor Name with your name.
4. Fill out the Requestor E-mail with your e-mail address.
5. Leave the following fields blank since they are not mandatory: Task type, Deadline and Priority.
6. Fill in the field "Describe Task" with the message you wish to convey to our team and/or any details and comments you have regarding your proposal. If you have none, simply write the name of the RfP " RfP – Industry 4.0 Transformation Service Pilot Project”.
7. Click on attachments and upload your Commercial Proposal as an attachment.

After completing the above-mentioned information, click on “Submit Task” to finalize your application. Please note that you will not receive any confirmation in your e-mail. However, you should ensure that this message appears to you on the screen after submitting your proposal: “Task created successfully”.

If you have any questions, please contact us at the following email address: procurement@eitmanufacturing.eu.

Proposal Requirements

Proposals should include the minimum following information:

- a) Company Profile: An overview of the supplier's company and business activities.
- b) Relevant Experience: Detailed presentation of track record and experience related to the activities described in this RfP
- c) Information relevant to future scaling up scenarios with internal EITM resources:
 - What type of training and/or certification can an EITM employee who is not an expert in IT and/or Manufacturing technologies take to deliver the training in the future?
 - Examples of templates and steps that will be used in order to create a roadmap with a customer
 - What other costs, e.g. SW license of other costs will be needed by EITM for the delivery of the service?
- d) Project Team: Profiles of the key people to be actively engaged from the Supplier in the implementation of the project.
- e) Price Proposed: Please provide specific and detailed pricing information in your proposal.
- f) Timeline. Proposed timeline for delivering the services, aligned with the indicative timeline provided in this RFP.
- g) Value Proposition. Explanation of how the supplier's services will add value to EIT Manufacturing and the participating SMEs.

6. Evaluation Criteria and Award Notification

Timely received proposals submitted by the tenderers will be examined, evaluated, and compared in accordance with the following criteria and the contracts shall be awarded to the highest ranked tenderers. The decision will be made according to the “Best Value for Money” principle having into account the criteria and weight (in percentage) outlined below.

The Evaluation Committee for this RfP will assess the submitted proposals on a scale from 1 to 5, with 1 being the lowest and 5 the highest. The minimum threshold for a positive evaluation will be 15 points, in accordance with the criteria specified in the RfP and their respective weights as detailed below:

Expertise and Experience (25%):

- Proven track record in conducting Maturity Assessments.
- Certified assessor credentials.
- Extensive experience in creating Industry 4.0 transformation roadmaps.
- Demonstrated ability to define realistic and actionable first steps for Industry 4.0 transformation.

2. Quality of Proposal (25%):

- Clarity and comprehensiveness of the proposed methodology.
- Creativity and effectiveness of the marketing materials.
- Detailed plan for customer onboarding and support.

3. Collaboration and Support (25%):

- Availability and commitment to the project timeline.

4. Cost and Value (25%):

- Competitive pricing for the services offered.
- Demonstrated value proposition for EIT Manufacturing and participating SMEs.

An Evaluation Committee of at least **3 (three) people** will be established and supervised by EITM. Each bid will be evaluated and ranked according to the criteria above. The compliance with the principles of transparency, non-discrimination, equal treatment, and absence of conflict of interest will be ensured.

The successful tenders and other unsuccessful tenderers will be informed in writing (via email) about the result of the award procedure. In case the winning tenderer is unable to enter the contract, EIT Manufacturing may decide to contract the supplier receiving the second highest ranking.

In duly justified cases, however, no later than 2 calendar days before the original deadline, the submission deadline can be extended. Upon request from the tenderer concerned, EIT Manufacturing will as quickly as possible, and in any event within 15 calendar days from receipt of a written request, inform:

- any unsuccessful tenderer of the reasons for the rejection of its tender, including, if this is the case, its decision that the works, supplies or services do not meet the performance or functional requirements,
- any tenderer that has made an admissible tender of the characteristics and relative advantages of the tender selected as well as the name of the successful tenderer or the parties to the awarded contract,

- any tenderer that has made an admissible tender of the conduct and progress of negotiations and dialogue with tenderers.

Information referred to above may be withheld where the release of such information would be contrary to the public interest, would prejudice the legitimate commercial interests of an economic operator, or might prejudice fair competition between economic operators. Should there be a suspicion that the provider will not be able to perform according to the price offered, EIT Manufacturing has the right to ask for explanations and may reject the tender where the evidence supplied does not satisfactorily account for the low level of price or cost proposed.

Complementary Note on the Evaluation Process:

After the initial evaluation of submitted proposals, it is possible that the potential top-ranked suppliers may be shortlisted for participation in a Pitch Session or in a set of interviews. The interviews will be tentative and could happen in the following days: 16th and 17th May 2024. It is important to emphasize that the evaluation will be conducted in strict accordance with the criteria outlined in the published Request for Proposal (RfP).

The primary objective of the Pitch Session or Interviews is to facilitate a deeper understanding of the received proposals, provide an opportunity to elaborate on specific details, and allow the EIT Manufacturing to get to know the team of professionals better. During this session, the shortlisted suppliers will have the chance to present their proposals, clarify any questions, and discuss how your firm can best meet the needs of EIT Manufacturing.

Further details regarding the Pitch Session or Interviews, including dates and logistics, will be communicated to the shortlisted suppliers following the initial evaluation of proposals.

Disclaimer of Liability for Technical Failures:

EIT Manufacturing shall not be held liable for any technical failures, interruptions, or glitches occurring in its digital tool designated for receiving proposals in the Request for Proposals (RfP) as mentioned in the link above, irrespective of the underlying reasons. EIT Manufacturing assumes no responsibility for any loss or damage resulting from such technical issues.

Verification of Proposal Receipt:

In case of any doubt or uncertainty regarding the submission status, the supplier is obligated to take appropriate measures to confirm the receipt of their proposal, utilizing the communication channels and tools made available by EIT Manufacturing for such verification. It is the sole responsibility of the supplier to verify the successful submission and receipt of their proposal through the available means provided by EIT Manufacturing. By participating in the proposal submission process, the supplier acknowledges and accepts that EIT Manufacturing disclaims any liability related to technical failures affecting the digital tool and that the supplier is accountable for ensuring the successful transmission and receipt of their proposal.

7. Complaint procedure

Tenderers believing that they have been harmed by an error or irregularity during the award process may file a complaint respecting the mentioned deadline. Appeals shall be addressed to EIT Manufacturing **only** via the following email address procurement@eitmanufacturing.eu The tenderers have **5 (five) days** to file their complaints from the date of receipt of notification of the results.

In your application to EIT Manufacturing the complainant shall explain what procedural aspects they consider having been violated along with any recommendations or remarks. Such charges need to be supported with data and facts and, if possible, – documentation. An appeal whose sole purpose is to obtain a second evaluation for no reason other than that the complainant disagrees with the final award decision is to be rejected.

8. Negotiations and Clarifications

Negotiations can be held in the following cases:

- if it is identified that the scope of services issued by EIT Manufacturing is not detailed enough, incomplete or some areas are lacking crucial information to complete the procedure for direct awards;
- if EIT Manufacturing has the intention to reduce the offered prices to find the best value for money;
- if all submitted prices are above the planned budget and it is everyone's interest to finish the procedure with success – in that case, price negotiation can take place. During a price negotiation, all tenderers are called to lower their prices by the same deadline in a written form.

EIT Manufacturing can organize as many rounds of negotiation as it is needed during the procedure in order to reach the highest quality of proposals and the best price.

Whenever possible, the negotiations should be carried out in writing, however, in special cases, video conference or even live negotiation can be organized. EIT Manufacturing also reserves the right to invite the tenderers to an individual meeting before the final award of contract in order to clarify details and ambiguities.

In case of obvious or perceived errors or omissions in the RfP, tenderers can request additional information or clarifications by the deadline provided in the above timeframe through email procurement@eitmanufacturing.eu

Upon receipt of the bids, they will be reviewed, and additional details will be requested from the tenderers as needed. The requests as well as the answers are to be submitted written by e-mail. Where information or documentation to be submitted by tenderers is incomplete or erroneous or where specific documents are missing, EIT Manufacturing staff may request the party concerned to submit, supplement, clarify or complete the relevant information or documentation within 3 days.

Bid preparation costs are not reimbursable and must be borne by the tenderers.

EIT Manufacturing owns all bids received in this RFP. Proprietary information of vendors in the bids will be kept strictly confidential. The offers as well as the contract may be submitted for audits.

9. Contract

The final award does not yet constitute the Contract.

As stated in this RfP, EITM has allocated a maximum budget of **EUR 5.000,00 (five thousand euros) per assessment and EUR 10.000,00 (ten thousand euros) per roadmap creation session for a contract of 12 (twelve) months with the possibility of renewal upon EITM's request. Suppliers' proposals must not exceed this amount.**

EITM anticipates requesting the Supplier to perform approximately three (3) assessments and a minimum of one (1) roadmap creation workshop. The Supplier acknowledges and agrees that such estimates are for planning purposes only and are non-binding. If the Supplier is selected pursuant to the Request for Proposal (RfP), the parties shall enter into a Framework Agreement. Under this Framework Agreement, the Supplier agrees to provide assessments and roadmap creation workshops as requested by EITM on an as-needed basis. The quantities of such services shall be determined by EITM in accordance with its requirements. The Supplier warrants that it possesses the technical capability to deliver the services in quantities that may exceed or be less than the aforementioned estimates, as specified by EITM in its requests.

Furthermore, it is explicitly stated that EITM is under no obligation to procure goods or services up to the maximum amount outlined in this RfP.

Service fees include value-added tax (VAT). In any case, the application of VAT should be determined by the legislation in the Supplier's country. Particularly in instances of cross-border invoicing, suppliers are required to furnish documentation demonstrating VAT deductibility or service type exemption according to local authority regulations to EIT Manufacturing's Finance Department.

The Contract will be concluded at the time of signature by the Supplier and EIT Manufacturing. The winning supplier will be sent the contract to be signed (indicating the deadline by which the signed contract should be returned to EIT Manufacturing).

The invoicing will be based on a mutually agreed schedule; it will be detailed in the contract. The contract that will be awarded will have duration of **12 (twelve) months with the possibility of renewal upon EITM's request**. The tenderer agrees that the total value of the contract to be signed with EIT Manufacturing for 12 (twelve) months will in no way exceed the bid (the amount contained in the offer) of the tenderer.

The awarded supplier will be requested to sign Standard Contractual Clauses (SCC) if no other GDPR compliant safeguards exist, and the supplier is located in a country for which the EU commission has not issued an adequacy decision.

10. Confidentiality Obligation

All information, whether written or oral, exchanged between the parties involved in this Request for Proposals (RfP) process, hereinafter referred to as the "Parties" shall be considered confidential and proprietary.

The Parties agree not to disclose, provide access to, or otherwise make available any confidential information to any third parties, including but not limited to individuals, companies, or organizations, who are not directly involved in the RfP process, without the express written consent of the disclosing Party.

"Confidential Information" shall encompass, without limitation, all data, documents, proposals, discussions, designs, specifications, financial information, technical data, trade secrets, and any other information disclosed by one Party to the other during the course of the RfP process.

The obligations of confidentiality shall not apply to information that is:

- a) Publicly available at the time of disclosure or subsequently becomes publicly available through no fault of the receiving Party.
- b) Already in the possession of the receiving Party prior to disclosure and not subject to an existing confidentiality obligation.
- c) Disclosed to the receiving Party by a third party with the legal right to do so without breaching any confidentiality obligations.
- d) Required to be disclosed by law, court order, or governmental regulation, provided that the disclosing Party is promptly notified and given the opportunity to seek a protective order.

Any Party found in breach of this confidentiality clause shall be subject to legal measures, including but not limited to litigation, injunctive relief, and monetary damages, as deemed appropriate by the disclosing Party.

The obligations of confidentiality as set forth in this clause shall survive the termination or completion of the RfP process and shall remain in effect for a period of 5 (five) years, unless both Parties mutually agree in writing to terminate this confidentiality agreement.

This confidentiality clause shall be governed by and construed in accordance with the laws of France. Any legal action arising out of or in connection with this clause shall be subject to the exclusive jurisdiction of the courts of Paris, France.

11. Cancellation of the proposal procedure

In the event of cancellation of the proposal procedure, EIT Manufacturing will notify tenderers of the cancellation. In no event shall EIT Manufacturing be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a proposal procedure, even if EIT Manufacturing has been advised of the possibility of damages.

The tenderer shall take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests'). S/he should inform the EIT Manufacturing team immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

The supplier cannot be a EIT Manufacturing Partner or an Activity Partner. Any bid from such an economic operator will be rejected.

Tenderers will be excluded if:

- a) they are being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations; they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- b) they have been guilty of grave professional misconduct proven by any means which the EIT Manufacturing can justify;

- c) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or any other country of the EU;
- d) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the EU' financial interests;
- e) following a procurement procedure or grant award procedure financed by the EU budget, they have been declared in serious breach of contract for failure to comply with their contractual obligations.

The tenderers must not be in a situation of a conflict of interest, and they have sufficient economic and financial capacity, technical and professional capacity, and legal and regulatory capacity to perform the requested services. Additional evidence or declarations might be requested by the contracting authority.

EIT Manufacturing reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities, conflict of interest or fraud. If substantial errors, irregularities, conflict of interest or fraud are discovered after the award of the tender, EIT Manufacturing may refrain from concluding the Contract.

ANNEX I - Tenders Declaration of Honor

[Place and Date]

[Name of the Legal Entity and/or Signatory]

I, [Full name of the supplier's representative], hereby declare the following in connection with my application for the Request for Proposal (RfP) [title of the RfP]:

- a) I will commit to take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests'). I will inform the EIT Manufacturing immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.
- b) I accept that during the implementation of the contract and for five years after the completion of the contract, the supplier must keep confidential any data, documents or other material that is identified as confidential at the time it is disclosed ('confidential Information').
- c) I accept that during the implementation of the contract and for five years after the completion of the contract, the EIT Manufacturing has the right for the purposes of safeguarding its financial interests, the offer and the contract of the supplier may be transferred to internal as well as external audit services.
- d) I confirm that I or the entity represented by me is not currently experiencing any of the following situations. If any situation applies, details are provided in an annex to this declaration along with a brief explanation.
- e) The entity is not bankrupt, subject to insolvency or winding up procedures, and its assets are not being administered by a liquidator or by a court. It is not in an arrangement with creditors, and its business activities are not suspended, nor is it in any analogous situation arising from a similar procedure under national legislation or regulations.
- f) There is no final judgement or final administrative decision establishing a breach of obligations related to the payment of taxes or social security contributions.
- g) There is no final judgement or final administrative decision establishing guilt of grave professional misconduct, including but not limited to fraud, violation of applicable laws or regulations, ethical standards, distorting competition, violating intellectual property rights, attempting to influence EU Bodies' decision-making processes, attempting to obtain confidential information, or any other wrongful conduct impacting professional credibility.

- h) There is no final judgement establishing guilty of fraud, corruption, participation in a criminal organization, money laundering or terrorist financing, terrorist-related offences, child labour, or other forms of trafficking in human beings.
- i) The entity has not shown significant deficiencies in complying with the main obligations in the performance of a contract, a grant agreement, or a grant decision financed by the European Union's budget, leading to early termination, application of liquidated damages, or other contractual penalties, discovered through checks, audits, or investigations.
- j) There is no final judgement or final administrative decision establishing that the entity has committed an irregularity within the meaning of Council Regulation (EC, Euratom) No 2988/95.
- k) There is no final judgement or final administrative decision establishing that the entity has created an entity in a different jurisdiction with the intent to circumvent fiscal, social, or any other legal obligations.
- l) In the absence of a final judgement or final administrative decision in the cases mentioned above, or in the case of point (e), I acknowledge that the Applicant may be subject to:
 - Facts established in the context of audits or investigations by EPPO, the Court of Auditors, OLAF, or the internal auditor, or any other check, audit, or control performed under the responsibility of the authorizing officer.
 - Non-final administrative decisions, including disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics.
 - Facts referred to in decisions of persons and entities implementing Union funds.
 - Information transmitted in accordance with the Financial Regulation.
 - Decisions of the Commission or national competent authority relating to the infringement of Union or national competition law.

I hereby declare the accuracy and truthfulness of the above statements.

Yours faithfully,

[Signature of the Supplier's representative]