SMART ENERGY LAB

Request for Proposal (RFP)

SEL Energy Management Platform:

Go-to-market plan, Cybersecurity strategy and PMO

30/07/2025

By Smart Energy Lab

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Issued by:

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1. Introduction

1.1 Smart Energy Lab

Smart Energy Lab (SEL) is a non-profit association that brings together science, technology, and industry in the energy sector, with renowned partners EDP Comercial and Accenture, and academic institutions such as Instituto Superior Técnico and INESC TEC. Through a collaborative model, SEL accelerates the development, implementation, and adoption of solutions to address the challenges of the energy transition.

Using innovation processes that include validation through market testing and pilots, SEL stands out by seeking competitive advantages that ensure market success, ranging from technological adaptation to cost reduction. Its main goal is to deliver products and services that promote the business of energy transition products offered by market players and their role in helping clients achieve carbon neutrality.

1.2 Strategic Opportunity

SEL seeks expert support to **develop and implement a go-to-market plan for SEL Platform, an edge-cloud energy management platform**, developed initially as an internal solution to deliver multiple new downstream energy products. SEL's technical and sectorial experience and through the contact with key stakeholders in field, potential SEL Platform takers and alternative solution providers, led us to believe that SEL Platform has a global market opportunity, with a focus on companies seeking to develop new energy management products and services.

There are five key arguments supporting the productization of the SEL Platform:

A. **Proven Internal value**: SEL consistently reuses the SEL Platform to deliver new products and services

B. **Market Gap**: In the process of building new energy management use cases, SEL sought to procure similar systems and found no useful systems at reasonable costs or with adequate functionality

C. **Commercial enabler**: SEL Platform is becoming a cornerstone of the commercial success of SEL products and services, as it building the basis for compliance, security and corporate system deployment readiness

D. **Growing Market Demand**: The energy management domain is expanding fast, due to the acceleration of the adoption of electric vehicles, heat pumps and batteries alongside with the widespread of solar PV, in all residential, commercial and industrial segments

E. **Customer needs and pain points**: Energy companies designing and developing these energy management use cases either need to develop the systems from scratch or procure an alternative solution in the market

To seize this opportunity, SEL must accelerate the delivery of the platform development roadmap outlined in Annex I. This requires the establishment of an effective **Project Management Office (PMO)** to ensure structured execution of the already identified projects and also those to be mapped throughout the go-to-market development. In parallel, the development of a robust **Cybersecurity Strategy**, aligned with industry standards, is essential to safeguard the platform and ensure long-term business resilience and stakeholder trust. Finally, defining and implementing a clear, scalable **Go-to-Market (GTM)** Plan will be critical to unlocking the platform's commercial potential.

Given the platform's current maturity and strategic ambition and building on the insights gathered through the prior RFI process focused on the Go-to-Market plan and Cybersecurity strategy, SEL has concluded that partnering with an external expert with international track record on these areas is essential. The RFI helped assess potential approaches, estimate implementation costs, and highlighted the value of external collaboration to accelerate delivery, reduce implementation risks, capture external qualified perspectives, and ensure alignment with industry best practices from day one, particularly in areas where agility and specialized expertise are essential.

1.3 "SEL Platform" development history and context

The energy sector is undergoing rapid transformation, driven by the transition to renewable sources and the growing complexity of distributed energy systems. As a result, both end-users and energy technology providers are facing increasing challenges in integrating and managing a diverse array of energy assets, such as photovoltaic systems, batteries, EV chargers and heat pumps, while ensuring effective coordination with corporate systems, markets, grid and system operators.

Since its inception, SEL has developed several products and services to accelerate the transformation in response to these demands. While different in their application, these offerings share a common set of characteristics: enabling systems intelligence, controlling local flexibility, and implementing user-centric energy management strategies. The building blocks created for one product, were repurposed for the next product. This culminated in the development of a rudimentary version of the **SEL Platform**.

More recently, an exercise of optimization was undertaken and the building blocks that constituted that first version of SEL Platform were refactored into a service oriented structure, with an API based approach to facilitate the reusage and speed of development. Alongside the cloud building blocks, there was a standardization effort on the local IoT controller devices that work as an extension of the cloud into local facilities with energy devices.

A powerful, cloud-edge energy management solution was thus designed to accelerate the deployment of digital energy services and support the seamless integration and operation of distributed energy resources (DERs). With its robust cloud–edge architecture, agnostic device connectivity, and flexible data integration capabilities, the platform enables real-time interaction with both local assets and external systems.

There are at least three original drivers for the development of the SEL Platform: a. an initial need to accelerate the delivery of SEL's digital solutions and streamline the implementation of key energy use cases; b. the need to provide internal teams with a scalable, unified foundation re-using already developed assets to support customer-facing operations and c. the need to manage the hardware stream more effectively, ensuring control over costs, specifications, and enhanced oversight of security and performance at the local level, particularly regarding the operating system and firmware running on edge devices.

To deliver on this ambition, the SEL Platform had to meet a set of architectural and functional requirements not adequately addressed by existing market solutions, particularly in terms of cost-efficiency, deployment flexibility, and integration with edge computing environments. These demands led to the creation of a hybrid architecture combining real-time control at the edge with cloud-based orchestration and data services.

To support these diverse applications, the SEL Platform is being developed around a modular architecture and a set of macro-functionalities that together enable scalability, compliance, and seamless integration with energy systems.

The table below summarizes the key functional domains of the platform:

Table 1. Key macro functionalities to be delivered by the SEL Platform

Type of Specs	Functionalities
Architecture / technical	• Ability **to implement any algorithm for energy management** - Using cloud processing - Or, local / edge processing • **Management of core services processes**: backoffice, remote upgrade, data management & analysis, security • **APIs** for easy integration with operator platforms, energy IoT and portals
Delivery	• **Cloud services** for business support • **Local HW and FW Services** for local management of energy assets • **Algorithms for Energy Management**
Compliance	• **Control of the use of assets**, for compliance • Enforce **GDPR** • Ensure **business continuity** and **Cyber security certification**

While the SEL Platform is already delivering value in targeted deployments, this project represents a strategic opportunity to sharpen its product focus, validate the fit with the intended market segment, and define a go-to-market strategy that supports long-term scalability, operational resilience, and differentiation in the evolving energy tech landscape. A detailed list of current SEL Platform deployments and projects is provided in **Annex I** – List of SEL Platform projects. This project also aims to strengthen the platform's foundation through a robust cybersecurity strategy and accelerate its development roadmap via coordinated project management.

1.4 Purpose of the RFP

The SEL Platform emerges at a pivotal intersection of digitalization, growing demand for energy efficiency, and SEL's proprietary technological capabilities. This convergence

creates a strong opportunity to scale, capture early market traction, and establish a differentiated position in the evolving energy management tech landscape.

In this context, this RFP is a key step in SEL's strategic initiative to fully realize the potential of its Platform and go beyond the internal applications of the SEL Energy Management Platform. SEL seeks a specialized partner to advance progress across three critical pillars:

i) The acceleration of the product development delivery roadmap through an effective **Project Management Office (PMO)** – to accelerate the delivery of already identified required projects and initiatives, but also new initiatives generated in the course of the project;

ii) The development of a robust **Cybersecurity strategy** aligned with industry standards – to win its market position, SEL Platform needs to conform with the most stringent requirements for cybersecurity, leveraging on a partner that not only understands the norms and technologies, but also can understand and anticipate the most critical elements Energy Management solutions takers request;

iii) The definition and implementation of a clear and scalable **Go-to-Market Plan** – furthering the development of the SEL Platform in the Portuguese context alone would provide limited growth opportunities and does not fully explore SEL Platform potential market in Europe and abroad.

Together, these efforts will ensure that SEL not only brings a compelling product to market but also builds the secure and scalable foundation required for long-term success.

The desired collaboration should focus on:

- providing strategic guidance,
- applying structured methodologies, and
- delivering hands-on execution support to help unlock the full market potential of the SEL Platform.

We are particularly interested in working with organizations that have a proven track record in launching B2B technological solutions in Europe and USA, ideally within the

energy or cleantech sectors. We will prioritize and invite suppliers based on teams experience, the delivery of effective business and technology acceleration methodologies validated by industry stakeholders, and a demonstrated ability to deliver fast, efficient execution with tangible results.

2. Project Overview

2.1 Main Objective of the Project

The main objective of this project is to unlock the full market and operational potential of the SEL Platform by activating three coordinated strategic pillars:

i) a robust **Go-to-Market (GTM) plan**,

ii) a comprehensive **Cybersecurity strategy**, and

iii) a focused **Project Management Office (PMO)** to accelerate execution.

More specifically, the project aims to:

i) Go-to-Market (GTM) plan

- **Clarify the strategic focus of the SEL Platform**, assessing its most relevant use cases, target applications, and functional strengths through a product–market fit lens;
- **Identify and prioritize high-potential customer segments**, based on quantified market opportunities and the platform's capacity to address specific needs;
- **Refine and tailor the value proposition** to articulate clearly the problems the platform solves, the benefits it delivers, and its differentiation across target segments;
- **Support internal readiness and initial external engagement with at least five international potential clients** (e.g., pitch preparation and participation) **to test and fine-tune the value proposition with real-world clients**.
- **Define optimal business, pricing, and commercial models**, aligned with adoption dynamics, growth ambitions, and partner/channel strategies;
- **Translate strategy into action**, developing a detailed business plan and go-to-market roadmap.

ii) Cybersecurity strategy

- **Decide the level of cybersecurity certification SEL needs to adopt and implement** in order to **ensure fulfilment of client procurement requirements and add competitive advantage to SEL against alternatives;**
- **Ensure the selection of a recognized Cybersecurity framework, which meets these conditions** and conduct a structured **assessment of the SEL Platform based on its principles**, aligning with industry frameworks and IT/OT risk management best practices;
- Evaluate the current maturity of the SEL Platform's cybersecurity posture, identify critical gaps, and deliver a benchmarked improvement plan;
- **Design a detailed cybersecurity implementation roadmap**, including governance and operating models, prioritized initiatives, and foundational tools;
- **Initiate execution through targeted technical actions**, such as threat modeling, secure SDLC process definition, and application security testing.

iii) PMO

- **Establish a structured and agile PMO service** to coordinate the delivery of key platform components, including hardware controllers, firmware, commissioning and asset management portals, back-office systems, and API standardization;
- **Define and manage a clear workplan**, with milestones, and dependencies to ensure on-time and on-scope delivery;
- **Ensure the PMO understands the value of each output** and proactively implements scale-up measures whenever technical specifications or business requirements changes occur, accompanied by a thorough impact analysis focusing on time allocation, resources committed and output quality or scope;
- **Support cross-functional alignment, risk tracking, and delivery acceleration** through best-in-class PMO practices and digital collaboration tools.

3. Scope of Work

The scope of this collaboration includes **strategic, analytical, and execution-oriented activities** required to define and initiate the go-to-market plan, the cybersecurity strategy and the PMO service. Throughout the process, the selected organization is expected to work closely with SEL's internal teams, bringing both strategic insight and practical execution support.

3.1 Go-to-Market (GTM) plan

To ensure a solid foundation for market entry and growth, the collaboration will be structured in three integrated streams, from product focus to execution planning, each building on the insights of the previous phase.

3.1.1 Product-Market Fit Exploration

This foundational stream focuses on transforming the SEL Platform's broad capabilities into well-defined product concepts through a co-creative process, ensuring clear market positioning based on real customer needs. Given the platform's broad technological capabilities, the key objective is to sharpen its strategic focus by validating product–market fit before deeper go-to-market planning begins.

The selected organization will collaborate with SEL to analyze platform-to-customer alignment, identify key needs and uncover unmet costumer pains and needs. This will guide prioritization of target segments and use cases, laying the groundwork for focused go-to-market planning.

Key objectives:

- Co-create product concepts rooted in validated customer needs and strategic market opportunities.
- Analyze alignment between platform features and priority customer problems.
- Identify gaps in the current value proposition that may hinder market adoption.

- Prioritize customer segments and use cases with the highest potential impact.
- Develop initial strategic tools to support GTM decision-making, **including a high-level business case and evaluation matrix.**

Mandatory Deliverables:

- **Customer segmentation brief**, including prioritized use cases and segment profiles;
- **Jobs-to-Be-Done summary**, highlighting customer problems and unmet needs;
- **Product–Need alignment map**, identifying key fit areas and potential improvement zones;
- **Product–Market Fit Evaluation Matrix**, used to assess and compare potential strategic directions;
- **Shortlist of recommended focus areas** (use cases or customer profiles) to inform subsequent streams.

3.1.2 Market Opportunity & Target Customer Definition

This stream deep dives on the assessment of the commercial potential of the SEL Platform and translating market insights into a clear, differentiated strategic positioning of the product in the previously identified focus areas. It combines rigorous market analysis with customer-centric design to identify high-priority opportunities, define ideal customer profiles, and shape value propositions that support effective go-to-market execution.

Key objectives:

- **Market Scope & Sizing:** Identify core and adjacent markets where the SEL Platform and its modular capabilities can deliver differentiated value. Quantify addressable opportunities through secondary research (e.g., industry reports, growth forecasts, adoption barriers).
- **Customer Segmentation & Ideal Profiles:** Define a segmentation framework based on firmographic, operational, and behavioral criteria. Develop Ideal Customer Profiles (ICPs) that align with the platform's strengths and commercialization priorities.

- **Primary Market Research:** Conduct interviews or surveys with potential customers and ecosystem stakeholders to validate key assumptions, uncover unmet needs, and test early value hypotheses.
- **Competitive & Comparative Assessment:** Analyze competing platforms across technology, business models, and GTM approaches. Benchmark the SEL Platform to highlight functional differentiators, value gaps, and areas for enhancement.
- **Value Proposition Design:** Craft segment-specific value propositions that clearly articulate the SEL Platform's functional benefits, strategic impact, and differentiation. Tailor messaging to the top identified segments and use cases.
- **Conduct real-market testing with at least five international potential clients** to validate the SEL Platform's value proposition, gather actionable insights, and identify key areas for refinement.
- **Strategic Positioning:** Define the SEL Platform's position in the broader energy tech landscape, clarifying its relevance, value narrative, and role across stakeholder groups.
- **Brand Foundations & GTM Framing:** Propose core branding themes, narrative pillars, and early guidance on GTM channels and partner strategies. Map the desired customer experience across the lifecycle, identifying key engagement moments.

Mandatory Deliverables:

- **Market opportunity report** (scope, sizing, trends)
- **Competitive benchmarking** and comparative assessment of the SEL Platform
- **Segmentation and prioritized customer profiles** (ideal customer profiles)
- **Actionable primary research insights** (including quotes, themes, unmet needs)
- **Segment-specific value propositions**
- **Strategic positioning** framework and differentiation map
- **Customer journey map and experience design principles**
- **Foundational branding narrative** and GTM messaging architecture
- **Shortlist of named, high-potential customers for early engagement**
- **Summary of real-market testing activities, including insights gathered from engagement with at least five international potential clients,**

focused on validating the value proposition and identifying key areas for refinement.

3.1.3 Business Plan & GTM Launch

This final stream consolidates all prior outputs into a concrete go-to-market strategy and business plan, supported by financial projections, operational planning, and commercial readiness.

Key objectives:

- **Business Case Development:** Synthesize prior findings into a robust business case, outlining the strategic rationale for commercialization. Include market opportunity, adoption potential, and high-level ROI analysis. Assess critical business and market factors, identifying risks and outlining possible mitigation strategies.
- **Go-to-Market Strategy & Commercial Plan:** Finalize a detailed GTM strategy, including market prioritization, routes to market, sales strategy, communication priorities, and strategic partnerships. Recommend business and pricing models that support scalability and long-term value creation.
- **Operational & Organizational Planning:** Outline core operational requirements to support the GTM strategy, such as team structure, roles, resource needs, and potential technical or go-to-market partnerships.
- **Financial Model & KPI Framework:** Build projections (revenue, cost, margin), and define KPIs to measure adoption and commercial success.
- **Execution Support & Pitch Preparation:** Support internal alignment and external engagement by co-developing sales materials (presentation toolkit) and participate in early-stage commercial meetings to support customer engagement.

Mandatory Deliverables:

- **A comprehensive Business Case, including:**
    - Market rationale, financial assumptions, and ROI logic;
    - Evaluation of strategic factors and potential risks to inform risk management and mitigation planning;

- Recommendation for go/no-go and commercial phasing;

- **A full Business Plan & GTM Roadmap, covering:**
  - Commercial strategy and operating model;
  - Financial projections and KPIs (including the spreadsheet version of the business plan);
  - Organizational and partnership considerations;
- A **Presentation Toolkit**, summarizing key recommendations, GTM architecture, and business rationale for internal and external use
- **Participation in select early-stage GTM interactions, including at least five potential client pitches.**

Note to Respondents: The listed objectives and deliverables represent SEL's mandatory objectives and deliverables for the Go-to-Market Plan. Respondents are welcome to propose enhancing methodologies to deliver the required outcomes and additional deliverables that can boost the overall quality of the mandatory targets delivery and add confidence to the results. Any additional element should be clearly identified and should not compromise the comparability of the proposals.

3.2 Cybersecurity strategy

The focus is to design and initiate a cybersecurity strategy tailored to the SEL Platform's needs as a critical, cloud-connected digital energy management infrastructure. This involves:

1) Identifying and implementing the necessary actions to ensure platform security and resilience against cyber threats,

2) Selecting the most appropriate cybersecurity certifications to pursue, those that help achieve the required security standards and offer a competitive edge, particularly in regulated or security-sensitive markets.

The strategy must align with industry best practices and meet the expectations of enterprise clients and stakeholders.

The cybersecurity scope is structured into three integrated streams, each building on the outputs of the previous one—from baseline assessment to actionable risk reduction.

3.2.1 Cybersecurity Strategic Plan Design

This first stream sets the foundation by selecting a relevant cybersecurity framework and assessing the SEL Platform against it. It aims to understand the current maturity, benchmark practices, and identify areas of improvement.

Key Objectives:

- Select an appropriate cybersecurity framework for IT/OT contexts.
- Assess SEL's platform and organizational cybersecurity maturity.
- Conduct a gap analysis and industry benchmarking.
- Generate strategic recommendations for improvement.

Mandatory Deliverables:

- **Cybersecurity Assessment Report**, including:
  - Recommendation of cybersecurity certifications to adopt and levels of security to attain
  - Maturity assessment of the SEL Platform
  - Gap analysis and benchmarking results for the recommended certifications
  - Recommendations for enhancement

3.2.2 Cybersecurity Evaluation and Alignment

This stream focuses on translating the assessment findings into actionable planning. It delivers a clear vision, guiding principles, and an implementation roadmap to drive alignment and readiness.

Key Objectives:

- Define cybersecurity vision and principles for the SEL Platform (IT/OT).
- Design governance and operating model blueprints for cybersecurity management.
- Build a structured roadmap of initiatives aligned with maturity gaps.

Mandatory Deliverables:

- Cybersecurity Vision and Principles document
- Governance and Operating Model Blueprints

- Cybersecurity Implementation Roadmap, prioritized and time-bound

3.2.3 Cybersecurity Execution and Controls Implementation

The final stream initiates tangible risk-reduction actions, focusing on platform-level and application-level security. It aims to integrate cybersecurity into the product development lifecycle and proactively mitigate threats.

Key Objectives:

- Conduct threat modeling of SEL Platform components and interfaces.
- Define security requirements and mitigation strategies.
- Establish tooling and processes for Secure Development Lifecycle (SDLC).
- Plan and prepare for static (SAST), dynamic (DAST), and cloud security assessments.
- Pass penetration testing on key systems – the number of System Applications to be tested will depend on Cybersecurity Implementation Roadmap

Mandatory Deliverables:

- **Threat Modeling Report**, including:
  - Identified threats and vulnerabilities
  - Prioritized risks and recommended controls
  - Documentation of potential attack vectors
- **SDLC Tools and Processes**:
  - Defined scope and objectives
  - Recommended toolchain (e.g., SAST/DAST setup)
  - Development team documentation and training material
- **Cloud Security Assessment**, including:
  - Platform risk exposure
  - Security posture and maturity recommendations
  - Penetration test results

Note to Respondents: The listed objectives and deliverables represent SEL's mandatory objectives and deliverables for the Cybersecurity Strategy. Respondents are welcome to propose enhancing methodologies to deliver the required outcomes and additional deliverables that can boost the overall quality of the mandatory targets delivery and add confidence to the results. Any additional element should be clearly identified and should not compromise the comparability of the proposals.

3.3 Project Management Office (PMO)

This focus is to design and to accelerate the execution of the SEL Platform development roadmap by establishing a lean but effective Project Management Office, managed by the awarded company for the period of 6 months. The PMO team must be local and available to work onsite at Smart Energy Lab's offices whenever requested. The PMO will provide structure, visibility, and coordination across multiple workstreams, including hardware (HW), firmware (FW), software platforms, and systems integration.

Key objectives:

- **Program Coordination**: Establish a program structure that brings together ongoing platform development initiatives (e.g., controllers, portals, APIs), new additions or suppressions of platform development initiatives, cybersecurity, and go-to-market preparation.
- **Milestone & Delivery Tracking**: Define and monitor critical path milestones, interdependencies, and progress metrics to drive timely delivery.
- **Execution Risk Management**: Identify key execution risks, mitigation actions, and contingency plans across development streams.
- **Cross-Functional Alignment**: Facilitate structured interactions between technical, product, security, and commercial teams to reduce rework and ensure strategic coherence.
- **Output Value Awareness & Impact Analysis:** Ensure the PMO understands the value of each output and proactively implements scale-up measures whenever technical specifications or business requirements changes occur, accompanied by a thorough impact analysis focusing on time allocation, resources committed and output quality or scope.
- **Execution Acceleration**: Propose and help implement efficiency improvements in the development lifecycle (e.g., decision gates, toolchain integration, change management).

- **Status Reporting & Governance Support**: Support regular reporting and decision-making forums by providing clear, data-driven insights and updates.
- **The PMO team must be local and available to work onsite at Smart Energy Lab's offices whenever required or requested**.

Mandatory Deliverables:

- **Integrated Execution Plan**:
  - Consolidated timeline covering HW/FW/software, GTM, and cybersecurity
  - Key milestones, owners, and interdependencies
  - Change tracking during the project execution, including change in project priorities, new initiatives additions and removal of superseded initiatives
  - Impact analysis and adaptation plan for technical specifications or business requirements changes, ensuring continuity and value preservation
- **PMO Toolkit & Operating Model**:
  - Roles, governance cadence, and reporting templates
  - Status dashboard and risk register
- **Weekly Progress Reports**:
  - Milestone tracking, issue escalation, and course correction recommendations
- **Execution Acceleration Recommendations**:
  - Suggestions to remove bottlenecks and improve coordination
- **Handover for internal PMO:**
  - All the previous documentation in a structured folder tree and a relational document explaining how they relate and should be used
  - 3 handover sessions

Note to Respondents: The listed objectives and deliverables represent SEL's mandatory objectives and deliverables for the PMO. Respondents are welcome to propose enhancing methodologies to deliver the required outcomes and additional deliverables that can boost the overall quality of the mandatory targets delivery and add confidence in the delivery. Any additional element should be clearly identified and should not compromise the comparability of the proposals.

4. Deliverables deadlines and expected project timeline

The expected delivery deadlines and project schedule are detailed in **Annex II –** Expected project timeline and key milestones**.**

5. Timeline for the RFP

Milestone	**Date**
Call for respondents	30/07/2025
Deadline for questions	22/08/2025
Proposal submission deadline	01/09/2025
Contractor selection (estimated)	15/09/2025
Project start (estimated)	01/10/2025

6. Requests for clarification

Until 22 August 2025, interested parties may request any clarifications necessary for a proper understanding and interpretation of the RFP.

Clarifications are notified by SEL within a reasonable time to all interested parties.

7. Price and payment method

The **total price indicated in the awarded proposal may not exceed 350,000.00 €** (three hundred and fifty thousand euros), plus VAT at the rate in force on the date of payment.

The total price comprises the following parcels, categorized as Fixed Service and Variable Service:

i) **Fixed Service**

Maximum price for Fixed Service:
The Fixed Service price may not exceed 308,000.00 € (three hundred eight thousand euros) for the delivery of:

a. the Go-to-Market (GTM) Plan,
b. Cybersecurity Strategy,
c. a six-month PMO service.

Abnormally low price for Fixed Service:
The total price proposed for the Fixed Service included in the Contract is considered abnormally low if it is less than 277.000,00 € (two hundred seventy-seven thousand euros).

If the price submitted is abnormally low, Smart Energy Lab will ask the respective tenderer to provide clarifications, within an appropriate time limit, regarding the relevant components of their proposal.

Proposals containing an abnormally low price, for which no supporting explanations have been submitted or which are not considered sufficient, will be excluded.

ii) **Variable Service**:

Maximum unit price, number of systems and total price for Variable Service:
This corresponds to the individual Application Security Testing, which is a variable component of the Cybersecurity Strategy. The **unit price per system application tested may not exceed €7,000.00 (seven thousand euros), individually**.

The maximum price for the Variable Service may not exceed €42,000.00 (forty-two thousand euros), considering a request of six (6) system applications to be tested during the contract duration.

Variable Service optionality character:
This service shall only be paid if and when expressly requested by Smart Energy Lab (SEL) and exclusively in proportion to the number of application tests carried out following such request.

The price will be paid by Smart Energy Lab upon key project milestones, as follows:

- Fixed Service
  - Project kick-off – 25% of the total fixed price
  - After final steering of the GTM Plan work – 25% of the total fixed price
  - After final steering of the Cybersecurity Strategy work – 25% of the total fixed price
  - After final project steering and handover completion – 25% of the total fixed price
- Variable Service
  - For each System Application Security Testing requested:
    - 100% of unit price upon delivery of test results.

8. Proposal

8.1. Proposal documents

Under penalty of exclusion, the proposal must include the following documents:

a) Document containing the Company background and relevant experience in the energy sector (preferably for similar projects).

b) Sanitized client references in the energy sector (preferably for similar projects) including execution date, duration, project scope and approach, the output impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA).

c) Document containing the Project timeline and key milestones, explicitly guaranteeing that the Go-to-Market (GTM) Plan will be delivered within a maximum of three (3) months from the project start date, and the Cybersecurity strategy component will be delivered within a maximum of four (4) months from the project start date.

d) Document indicating the Detailed pricing, specifying:

i) Total price for the execution of all the services included in the Contract, which may not exceed 350.000,00 € (three hundred and fifty thousand euros), otherwise the proposal will be excluded. This includes:

- Fixed Service: GTM Plan, Cybersecurity Strategy, and a six-month PMO service, which may not exceed 308,000.00€ (three hundred eight thousand euros), otherwise the proposal will be excluded.
- Variable Service: Cybersecurity Application Security Testing, with a unit price per application tested not exceeding 7,000.00€ (seven thousand euros), otherwise the proposal will be excluded. The total value for this service may not exceed 42,000.00€ (forty-two thousand euros).

e) Document providing a detailed response to the evaluation factor B "Team experience and qualifications" and respective subfactors (B1 to B8), as defined in the award criteria, including:

B1 - Description of relevant participation or conduction of GTM projects in the energy sector, particularly internationally, EU wide beyond Iberia or worldwide, with concrete and recent experience (in the last 4 years). It should include a relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA).

B2 - Description of cybersecurity project experience in the energy sector, especially internationally, EU wide beyond Iberia or worldwide. with concrete and recent experience (in the last 4 years). It should include a relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA).

B3 - Description of concrete and recent (in the last 4 years) PMO project experience in the energy sector. It should include a relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA).

B4 - Description of relevant and applied technical experience in software and cybersecurity. May demonstrate system integration of critical platforms, cloud technologies, and data protection, aligned with SEL's context.

B5 - Description of complementary experience in adjacent sectors, highlighting the added value and relevance to the SEL context.

B6 - CVs of key team members including academic background, relevant experience for the project and years of relevant experience, as well as justified certifications when applicable. If certifications are included, their relevance to GTM, Cybersecurity, and PMO must be justified.

B7 - Team allocation plan showing clear commitment and direct involvement of key team members.

B8 - Description of the SME's network of international experts, partnerships, and access to specialized business knowledge information,

along with a clear explanation of how these resources will be mobilized and integrated by the SME in the project delivery and acceleration to add value throughout the project lifecycle on output quality and time to deliver.

f) Document providing a detailed response to the evaluation factor C “Technical project quality” and respective subfactors (C1 to C4), as defined in the award criteria, including:

C1 - Document describing the proposed methodology, demonstrating a clear, logical, and technically sound structure.

C2 - Document showing how the proposed approach aligns with SEL’s platform context and addresses the specific goals and challenges of the project.

C3 - Description of proposed acceleration strategies and risk mitigation measures, including how they contribute to meeting SEL’s strategic deadlines.

C4 - Description of any innovative or distinctive approaches that add value beyond the expected project scope.

For commercial, industrial or other confidentiality reasons, tenderers may request, when submitting their proposal, that certain documents which constitute the proposal be classified in accordance with the law, for the purpose of restricting or limiting access to them to the extent strictly necessary.

SEL will decide on the classification of the documents that constitute the proposal and will notify the tenderers when the proposals are opened.

8.2. Exclusion grounds

The proposal will be excluded, if the company does not comply with the following requirements:

a) The price of Fixed Service, exceeds 308,000.00€ (three hundred eight thousand euros).
b) The unit price of Variable Service, exceeds 7,000.00€ (seven thousand euros) and the total price for the Variable Service exceeds 42,000.00€ (forty-two thousand euros).
c) The proposed timeline exceeds the maximum delivery periods of:

- Three (3) months from the project start for the Go-to-Market (GTM) Plan;
- Four (4) months from the project start for the Cybersecurity Strategy.

d) Lack of project portfolio documentation of at least eight (8) relevant Go-to-Market (GTM) projects in technology completed within the last four (4) years, including descriptions of client type, project dates, challenges and scope, outcomes, and impact in international projects.
e) Lack of portfolio documentation for at least eight (8) relevant Cybersecurity projects in technological platforms completed within the last four (4) years, including descriptions of

client type, project dates, challenges and scope, outcomes, and impact in international projects.

f) Terms and Conditions of the project delivery, including warranties, limitations, exclusions and support terms that are not compatible with the critical imperative conditions presented in **Annex III -** Imperative conditions to be respected by the winning tenderer.

8.3. Submission Instructions

Proposals must be submitted by 01 September 2025 to:
procurement@smartenergylab.com

The following subject line should be used:

RFP Response – [SEL Energy Management Platform – Go-to-market plan, Cybersecurity strategy and PMO]

9. Award Criteria

Proposals will be evaluated based on the following factors:

Factor	Criterion	Weight (%)
A	"Cost" (Total price in € for the execution of all the services included in the Contract)	50%
B	"Team experience and qualifications"	30%
C	"Technical project quality"	20%

The award will be made to the proposal with the highest Final Score (FS), calculated using the following formula:

FS = [0,50 × A] + [0,30 × B] + [0,20 × C]

Where:

- FS – Final score of the bidder's proposal;
- A – Score obtained in factor A, *"Cost"*;
- B – Score obtained in factor B, *"Team experience and qualifications"*;
- C – Score obtained in factor C, *"Technical project quality"*.

Factor *A*: "Cost" score

The score for each proposal under Factor A will be determined as follows:

$$A = [0{,}90 \times A1] + [0{,}10 \times A2]$$

Where:

A1: Score for Fixed Service Price ($Price_{A1}$) of GTM, Cibersecurity Stategy and PMO

The score for each proposal under Subfactor A1 will be calculated as follows:

- **If $Price_{A1}$** > 308.000,00 €, then the proposal will be excluded;
- **If $Price_{A1}$** ≤ 308.000,00 €, then:

$$A1 = -0,16129 \times \mathbf{Price_{A1}} + 54,67742$$

A2: Score for Variable Service Unitary Price ($Price_{A2}$) of Cibersecurity- Application security testing

The score for each proposal under Subfactor A2 will be calculated as follows:

- **If $Price_{A2}$**> 7.000,00 €, then the proposal will be excluded;
- **If $Price_{A2}$**≤ 7.000,00 €, then:

$$\mathbf{A2} = -2{,}5 \times \mathbf{Price_{A2}} + 22{,}5$$

Factor *B*: "Team experience and qualifications" score

The score for each proposal under Factor B will be calculated as follows:

B = [0,20 × *B1*] + [0,15 × *B2*] + [0,10 x *B3*] + [0,05 x B4] + [0,05 x B5] + [0,15 x B6] + [0,15 x B7] + [0,15 x B8]

Where:

Subfactor	Subcriteria	Descriptor	Weight
B1	Declared experience in GTM within the energy sector **on international projects**	Assess the team's relevant participation or conduction in Go-to-Market (GTM) projects in the energy sector, **in international contexts, EU wide beyond Iberia or worldwide**. Emphasis is placed on concrete and recent experience (in the last 4 years), **with projects demonstrating cross-border or multinational relevance**. Evaluate the evidence provided (e.g., relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA)).	20%
B2	Declared experience cybersecurity within the energy sector **on international projects**	Assess the team's effective participation in Cybersecurity projects in the energy sector, and **conducted in or for international markets, EU wide beyond Iberia or worldwide**. Emphasis is placed on concrete and recent experience (in the last 4 years), **highlighting the team's ability to address global regulatory, operational, and threat**	15%

Subfactor	Subcriteria	Descriptor	Weight
		environments. Evaluate the evidence provided (e.g., relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA)).	
B3	Declared experience in PMO within the energy sector	Assess PMO team effective participation in the energy sector. Emphasis is placed on concrete and recent experience (in the last 4 years). Evaluate the evidence provided (e.g., relevant project portfolio, discriminating the role in the project, the project scope and approach, the project impact and the client (sanitized but categorized by client type, geography and a proxy for size, e.g. EBITDA).	10%
B4	Declared experience in the IT sector (particularly software and cybersecurity)	Verify whether the profiles have relevant and applied technical experience in similar contexts. Assess the technological alignment with SEL's context. Pay special attention to system integration of critical platforms, cloud environments, and data protection.	5%
B5	Declared experience in adjacent sectors (e.g., telecommunications, non-electric utilities)	Evaluate the added value of complementary experience in adjacent sectors. Cross-sectoral experience will be valued.	5%
B6	Qualifications and seniority of key profiles	Assess academic background, professional seniority, and recognized certifications (e.g., PMP, PRINCE2, CISSP, ISO 27001, Scrum, etc.). Bidders should justify the relevance of these certifications to the areas of GTM, Cybersecurity, and PMO. The absence of certifications will not be disqualifying but will impact the score if their relevance is justified.	15%

Subfactor	Subcriteria	Descriptor	Weight
B7	Direct involvement of the key team members in service delivery	Evaluate whether the key team members profiles will be directly involved in the project. Clarity in the allocation plan and level of commitment is valued. Proposals presenting only "reference teams" (without commitment to actual involvement) will be penalized.	15%
B8	Subject Matter Expert's (SME's) expertise and Access to International Knowledge Resources	Evaluate the depth and relevance of the SME's expertise, including their access to international expert networks, partnerships, and specialized knowledge information relevant to the SEL Platform scope. The proposal should clearly explain how the SME's skills, connections, and resources will be actively leveraged in the project delivery and acceleration to add value, support informed decision-making, and ensure alignment with international best practices throughout the project lifecycle.	15%

The scores for subfactors B1 through to B8 will be assigned based on a rating scale from 0 to 10, where 0 represents the lowest score and 10 the highest.

Factor *C*: "Technical project quality" score

The score for each proposal under Factor C will be calculated as follows:

C=[0,30 × $C1$] + [0,30 ×$C2$] + [0,25 x $C3$] + [0,15 x C4]

Where:

Subfactor	Subcriteria	Descriptor	Weight
C1	Clarity and coherence of the proposed methodology	Assess whether the proposed methodology is well-structured, logical, and easy to understand; it should demonstrate technical proficiency and clarity in approach. It should also ensure a shared understanding and overall	30%

Subfactor	Subcriteria	Descriptor	Weight
		coherence in the ultimate objectives among the three workstreams.	
C2	Adequacy to SEL Platform context and specific project scope and objectives	Verify whether the proposal directly addresses the project's goals, taking into account the specific challenges of the SEL platform. It should also aim to minimize risks and inconsistencies across workstreams, as well as reduce coordination costs among them.	30%
C3	Acceleration strategies and risk mitigation	Evaluate whether there is a clear and feasible plan to accelerate delivery, minimize risks, and ensure compliance with SEL's strategic deadlines.	25%
C4	Innovation and added value	Analyze the presence of innovative and distinctive approaches that provide additional value beyond the minimum expected scope.	15%

The scores for subfactors C1 through to C4 will be assigned based on a rating scale from 0 to 10, where 0 represents the lowest score and 10 the highest.

10. Preliminary and final reports

After analysing and evaluating the proposals, SEL will issue a preliminary report, in which it will propose the admission/exclusion of proposals and will classify the admitted proposals, according to the award criteria established in point 9 above.

SEL will notify all tenderers of a preliminary report, together with the proposals submitted.

The tenderers may submit their observations on the preliminary report in writing, using the e-mail address indicated in point 8.2 above, within 5 days.

SEL issues a final report in which it considers the observations made by the tenderers and notifies it to all the tenderers.

When the final report results in a change to the ordering of the tenders contained in the preliminary report, SEL proceeds to a new prior hearing.

11. Qualification documents

After the notification of the final report, SEL notifies the winning tenderer to submit, within 5 days, the following qualification documents:

a) Documentation declaring:

i. The relevant experience and qualifications of each team member, including:

i.1. Curriculum Vitae of all team members whose CV has not yet been submitted at the time of the proposal submission, i.e. neither key team members nor SMEs, in accordance with paragraph (g) of point 8.1 – Proposal Documents;

i.2. Official certificates of degrees and certifications such as PMP, or others, when applicable for all team members.

ii. The certificate of commercial registry ("*Certidão Permanente do Registo Comercial*") or equivalent document in the State of which it is a national or in which its main establishment is located.

b) Documentation proving that the winning tenderer is not in breach of its obligations relating to the payment of taxes or social security contributions in Portugal or, where applicable, in the State of which it is a national or in which its main establishment is located.

The deadline for submission of qualification documents may be extended, at the request of the winning tenderer, for a period not exceeding 5 days.

The Smart Energy Lab may award the contract to the next highest tenderer, if the winning tenderer:

a) Fails to submit the required qualification documents within the stipulated deadline;

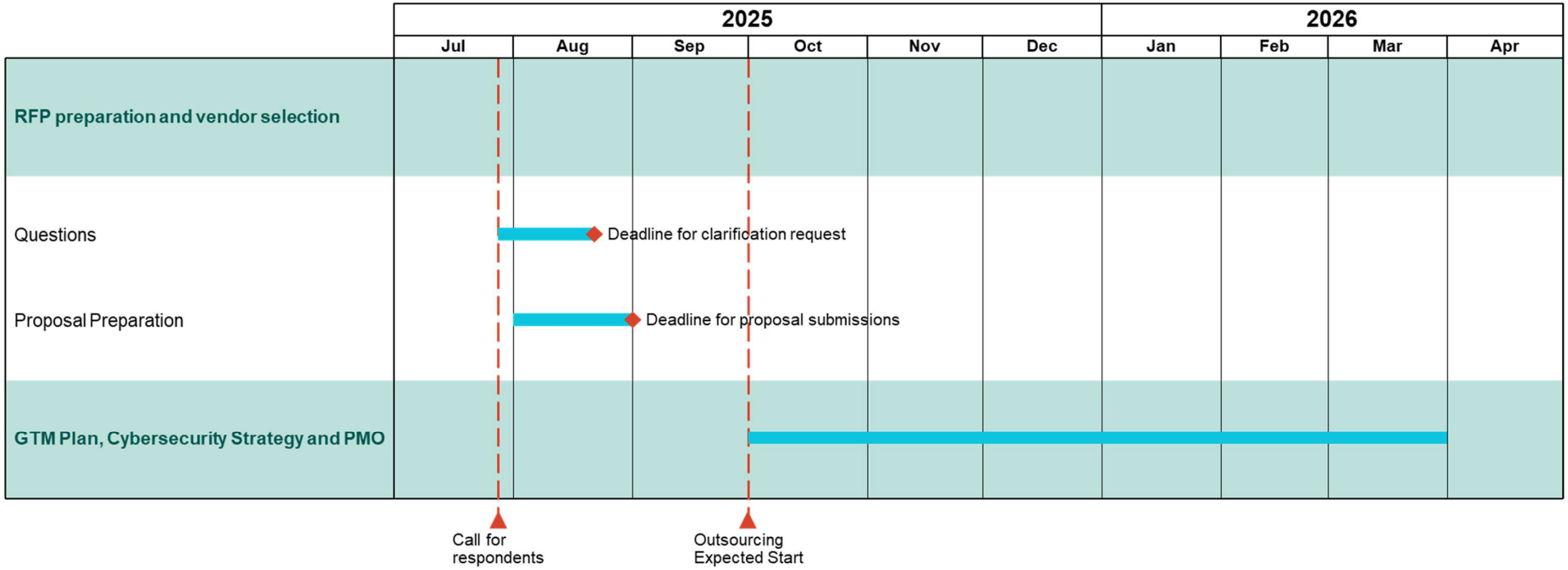
b) Is in one of the situations referred to in subparagraph c) above.

Annex I – List of SEL Platform projects

Note: This is a non-exhaustive list of SEL Platform project categories and may be subject to change during this project

Project Area	Description	Number of Projects
Webapps	Commissioning portals, operator tools, end-user apps	More than 10 projects
Algorithms	Cloud optimization, decision trees, local control logic	More than 5 projects
Integration with Energy Assets	EV chargers, battery inverters, heat pumps, electric boilers	More than 10 projects
Controller Development	Hardware and firmware for local control units	Less than 5 projects
Data and Analytics	User and energy insights; translation into business actionable development	Less than 5 projects
API Integrations	3rd-party cloud integrations utilities, forecast or optimization providers, OEM cloud to cloud integration	Less than 5 projects
Business Processes	Optimization and implementation of business process flows, from sales leading to installation and O&M	More than 10 projects
Outsourced Projects	Projects in partnership with academia and industrial R&D partners	Variable, based on external timelines

Annex II – Expected project timeline and key milestones



Annex III – Imperative conditions to be respected by the winning tenderer

Clause 1

(Intellectual and Industrial Property)

1. All inventions, suggestions for technical improvements, and/or other similar creative activities, created or developed by the collaborators assigned by the winning tenderer or for the execution of the Contract, including all creations subject to registration of industrial property rights and copyrights ("Intellectual Property Creations") that are in any way relevant to SEL's activities must be immediately communicated to SEL.

2. The winning tenderer undertakes to obtain from its collaborators assigned to the service provision all necessary authorizations and declarations, so that the intellectual property belongs to SEL, and the winning tenderer is responsible for providing adequate compensation for this purpose.

3. Likewise, the winning tenderer undertakes to agree with the collaborators assigned to the provision of services on a clause that allows SEL to hold ownership of the rights over the Intellectual Property Creations, even if they have been developed outside the scope of the services provided by the winning tenderer.

4. The Parties expressly agree that the aforementioned Intellectual Property Creations are the exclusive property of SEL and that all intellectual property rights and economic copyrights will be assigned to SEL, with the winning tenderer obliged to obtain from the collaborators assigned to the service provision the necessary documentation for this purpose.

5. The winning tenderer agrees and declares that, at SEL's request, they will sign, acknowledge, and prepare all documents, and will obtain from the staff assigned to the service provision all documents necessary for obtaining industrial property rights and copyrights in any country or countries, with all costs being borne by the winning tenderer.

6. The winning tenderer undertakes to agree with the collaborators assigned to the provision of services that the remuneration of these collaborators already includes special compensation for any creative activity, with the collaborators not entitled to any additional remuneration, indemnity, or compensation in this regard from SEL.

7. The winning tenderer undertakes to agree with the collaborators assigned to the provision of services that they are obliged to comply with all internal rules and policies regarding intellectual and industrial property rights in force at any time at SEL, particularly the Intellectual Property policy.

Clause 2

(Distinctive Signs)

1. The winning tenderer is prohibited from using any distinctive signs of trade that are the property of SEL, or that SEL is authorized to use by any other title, namely trademarks, logos, or internet domain names, in public dissemination channels such as social media or news outlets, in the name of SEL, or if such use could easily be identified by third parties as belonging to or being directly or indirectly under the responsibility of SEL.

2. Non-compliance with the provisions of the above paragraph may constitute grounds for immediate termination of this Contract, granting SEL the right to compensation for damages resulting from such breach.

Clause 3

(Confidentiality)

1. All information to which the winning tenderer and any personnel assigned by them to the provision of the contracted services have access as a result of the execution of the Contract, regardless of the format in which it is found, shall be considered confidential, except for information that is public knowledge or that reaches the winning tenderer through third parties who have lawfully obtained and disclosed it ("Confidential Information").

2. Confidential Information includes all information relating to the business, whether technical, commercial, or financial in nature, including trade secrets, and information about clients, suppliers, partners, and marketing plans.

3. The winning tenderer and the personnel assigned to perform the services under the Contract are bound by the obligation of confidentiality regarding the Confidential Information. They may not disclose it, in any way, directly or indirectly, communicate it to unauthorized third parties, or use it for their own purposes without the prior written authorization of SEL.

4. The winning tenderer undertakes to adopt security measures in relation to the Confidential Information and to ensure that the personnel assigned to the execution of the Contract adopt similar measures, with the aim of preventing unauthorized access by third parties as well as disclosure of such information. In particular, the Service Provider is obliged to implement any measures SEL imposes through instructions issued to protect the Confidential Information.

5. The above obligation remains in effect beyond the duration of the Contract. Upon termination of the Contract, the winning tenderer must return all Confidential Information in their possession to SEL, regardless of the format in which it is held.

Clause 4

(Personal Data and Privacy)

1. For the purposes of the Contract, the winning tenderer understands that “personal data” is any information relating to an identified or identifiable natural person (“the data subject”); and that an identifiable person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, identification number, location data, electronic identifiers, or one or more specific factors relating to that person’s physical, physiological, genetic, mental, economic, cultural, or social identity.

2. For the purposes of the Contract, the winning tenderer understands that the processing of personal data refers to any operation performed on personal data, whether automated or not, such as collection, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, comparison or interconnection, restriction, erasure, or destruction.

3. The winning tenderer acknowledges that, during the provision of its services, it may be necessary to access or process personal data for which SEL is responsible, or personal data of third parties who are clients or suppliers of SEL.

4. Thus, any personal data processed or merely accessed by the Service Provider during the provision of services to SEL shall be treated as confidential unless expressly indicated otherwise by SEL.

5. The winning tenderer and any personnel assigned to the execution of the contracted services may not copy, transfer, or disclose any personal data for which SEL is responsible, nor use them for any purposes other than those expressly indicated by SEL.

6. The winning tenderer must inform SEL immediately if there is reason to suspect that personal data for which SEL is responsible have become known to or accessed by an unauthorized person.

7. SEL reserves the right to issue additional instructions at any time to ensure the confidentiality and integrity of the personal data for which it is responsible, as well as to establish control procedures to ascertain the degree of compliance with such instructions.