

# **Rules and Conditions for Experts**

## **Solar Impulse Foundation**

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V08	04.2025	Maximum tags & 1 assessment minimum per year

Table 1: Document's historical versions

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This document presents the rules and conditions applied by the Solar Impulse Foundation and the World Alliance for Efficient Solutions for Experts participating in the evaluation of the submitted Solutions for the Label.

# **Chapter 1**

## **Introduction**

### **1.1 Context**

The Experts are part of the Solar Impulse Label selection process (see Standards for the Solar Impulse Efficient Solution Label). Their role is to assess the applicant Solutions assigned to them on three criteria formulated as yes/no questions (feasibility, environmental benefits, client's economic incentive) – see Assessment Guidelines for Experts. Their evaluations will help determine whether a Solution is to be considered an Efficient Solution as per the definition of the Solar Impulse Foundation, and serve as a basis for the Solar Impulse Foundation's Label attribution decision.

# Chapter 2

## Experts' Eligibility and Registration Process

### 2.1 Required Competencies

The opportunity to become an Expert for the World Alliance is open to anyone who can demonstrate:

- A minimum of 5 years of experience closely related to one or more of the five sectors listed below and applications.
- To be able to assess all three criteria: feasibility, environmental benefits, and the client's economic incentive.
- To be capable of effectively communicating in written English.
- To possess relevant business experience – preferably on an international basis (e.g. understanding of local markets in various countries).

### 2.2 Registration process

To become an Expert, each candidate must register on the Solar Impulse's website. The registration consists in the creation of an Expert profile which will allow the Solar Impulse Foundation's team to ensure that each candidate meets the requirements described in section 2. The Expert profile will be also used as a basis to assign the most appropriate Solutions based on their documented expertise.

	Sector
1	Buildings & Construction
2	Industrial Processes & Consumer goods
3	Utilities (Water, Energy, Waste)
4	Agrifood & Natural Environment
5	Mobility

Table 2.1: Sectors considered in scope.

### **2.2.1 Account creation**

On the Solar Impulse's webpage (<https://solarimpulse.com/experts/subscribe>) prospect Expert can create an Expert's account by entering their email address (preferably belonging to an organization/institution domain) and a password of their choice. Experts will receive an account activation email and a welcome message. In case the Expert fails to receive the email message with the account activation link within 5 minutes, he/she must check the spam folder or get in touch with the SIF team [expert@solarimpulse.com](mailto:expert@solarimpulse.com). Once the first step is completed, the Expert will be automatically redirected to a "Contact Info" page, where he/she is further requested to insert their "First Name", "Last Name", "Title", "Phone Number" and the "Current Position". They will also have to provide the "Company Info" such as "Organization Name" and "Organization Website". The next step of the registration process requires Experts to read the following documents:

- Charter Of The World Alliance For Efficient Solutions;
- Standards for the Solar Impulse Efficient Solution Label;
- Assessment Guidelines for Experts;
- Expert - Rules & Conditions;

Lastly, Experts are requested to e-sign the Voluntary Commitment for Experts, which confirms that every Expert is aligned with the Standards for the Solar Impulse Efficient Solution Label and the Assessment Guidelines for Experts, forming the boundaries of the contribution. Please note: this document is not a legal commitment for a number of working hours.

### **2.2.2 Completion of Expert Profile**

Following the account setup, it is essential that each Expert completes the profile information correctly in particular, providing information on (1) personal and professional details, (2) updated references that justify their experience (LinkedIn profile or CV), (4) competency filter - a maximum of 2 sectors, 5 applications and 15 tags.

Once a prospect Expert has clicked on the "submit" button at the end of their application, the SIF's team will receive the file. If the information is complete and in line with the requirements, the Expert will receive an email notifying their approval. Following the SIF's approval, the prospect Experts effectively become part of the Expert community. It is expected that all newly registered Experts follow a compulsory online training prior to performing an assessment. This step will ensure that the Experts are well-trained and aware of the notions contained in the Assessment Guidelines for Experts. To be noted that SIF retains the right to re-contact prospect Experts in case additional information is required before approving their application, as well as rejecting prospect Experts that do not fit the required competencies.

Terms and conditions of the Expert's contribution during registration, prospective Experts are invited to sign a commitment to confirm their participation. In addition, it undertakes to acknowledge and approve all relevant conditions, references and uses of the online information. The commitment includes tasks and obligations of impartiality and confidentiality; thus, it is important that the Expert reads them carefully before signing.

## **2.3 Confidentiality**

### **2.3.1 Confidentiality of the Expert's Personal Information**

The information contained on the Expert database will not be made available to the general public. The World Alliance affiliates (Members and Partners) may receive certain information from the Expert profile. However, the Expert's anonymity is respected unless expressly requested by the World Alliance and with the Voluntary Commitment for Experts. The Expert profile will be deleted two weeks after the expiry of the engagement and after the completion of all individual tasks related to the Experts.

### **2.3.2 Confidentiality of the Solution Submission Form**

The Expert is aware that the information provided by the Innovator/Member in the Solution Submission Form is theoretically non-confidential, as agreed by the Member to avoid complexity and intellectual property issues. However, the Expert is also aware that he/she should not disclose the information provided to him directly or indirectly in the context of his World Alliance Assessment, whatever format it was in. Such information may be physically marked as confidential or deemed as such. The Expert shall treat what he/she judges as confidential information as company secrets and with a reasonable standard of care. In particular, he/she must not use, copy, reproduce or reverse engineer the confidential information for any purpose other than for assessing the respective Solutions. The World Alliance makes no warranty regarding the accuracy, reliability, and completeness of the disclosed confidential information. The World Alliance shall have no liability to the Expert as a result of the disclosure of confidential information. The Expert should discontinue any confidential information as soon as it is no longer needed for the assessment, whether that material is directly provided by the World Alliance or derived from such.

### **2.3.3 Conflict of Interests**

To make the most of each organization's capacities and competencies, the Solar Impulse Foundation encourages entities to simultaneously submit Solutions and offer Experts. To avoid conflict of interest, the following sets of preventive measures are in place:

- When assigning an Expert to a Solution, the SIF ensures with its knowledge that each Expert has no conflict of interest related to the task.
- The Solution's provider has the opportunity to give a list of companies and individuals by whom he does not want to be assessed;
- If an organization submits a candidate Solution, its Experts will automatically be excluded from the assessment process.
- An individual person is invited to register on the website as an Expert or a Solution provider, but not both.

If a Solution is assigned to an Expert, and the Expert effectively has a direct or indirect interest or connection with the Solution (which the World Alliance was not aware of), the Expert has the responsibility to indicate it and decline the proposed task. The commitment that the Expert signs includes a declaration by which he/she undertakes to avoid any conflict of interest and,

should it appear, to declare that he/she is taking countermeasures.

To avoid conflicts of interest situations, the World Alliance may withdraw Experts from their evaluation functions if it deems necessary. In this case, the Expert will be informed of the upcoming actions. If an Expert knowingly conceals a conflict of interest and it is discovered during his/her evaluation, he/she will be dismissed with immediate effect, and the remaining tasks and agreements will be terminated. (Example: Submit proposals through a third party to be considered in the Solution catalogue while assessing the same candidate Solution as an Expert).



# Chapter 3

## Amount of Contribution

The involvement of each Expert may vary over time depending on the tasks, personal suitability of the candidate Solutions, and above all the availability of the Expert. As a general guideline, the assessment of a candidate Solution should take between 4 to 6 hours in total (depending on the complexity and completeness of the information provided by the Innovator). The Expert has all the rights to accept or decline an assessment according to their current availability.

Experts are required to evaluate at least one solution annually to stay active in our community. Failure to do so may result in the Solar Impulse Foundation removing their profile from the expert community (depending on context and number of assignments).

### 3.1 Remuneration

Even if the Expert's contribution is much appreciated, the World Alliance is not able to offer any financial remuneration per assessment performed. However, the FSI will provide on a case-by-case basis, financial support (daily rate, travel expenses etc.) to compensate for the Experts' efforts.

### 3.2 Place of Work

Experts can do their work either from home or a place of work. As part of their role, the Experts may be invited to participate in special sessions and events that may take place either at the SIF office in Lausanne or third-party premises.

### 3.3 Accept/decline a task

The World Alliance has established a match-making process to find the three best Experts for each Solution. On a non-regular basis, Experts are offered an assessment, and they are requested to accept or decline the invitation within five days from the assignment date. The Expert may refuse the task for either personal or professional reasons or due to an incorrect expertise matching. Remarks:

- The selection and assignment of Experts is done manually on a case-by-case basis by the SIF team;
- Matchmaking of Experts and solutions is based on information from the Expert profiles and the Solution's Submission Form (SSF);
- Being registered as an Expert does not lead to a minimum of assignments.

### **3.4 Complete the Assessment**

Accepting a task gives the Expert access to the Solution Submission Form (the dossier completed by the Innovator) and the Solution Assessment Form (the form that the Expert must use to complete the evaluation) online. The Expert has 15 days (Since the Assignment date) to complete his/her assessment and submit it through the web platform. The only case where an Expert can submit her/his assessment later than 2 weeks after accepting the task is when there is missing information in the Solution Submission Form and the Expert is waiting for the Member/Solution's owner to provide the missing elements via the chat online in order to continue her/his evaluation (see Assessment Guidelines for Experts).

### **3.5 Quality Control of the Assessment**

While it is the responsibility of the Solution's provider to submit correct and consistent information about the candidate Solution, it is the responsibility of the Expert to strive to provide an accurate and impartial assessment using the most recent and practical techniques at the time of the assessment. The Expert must complete all the sections of the Solution Assessment Form (SAF) in accordance with the latest experts training. SIF retains the right to invalidate assessments that are not considered to be in line with the guidelines, without the possibility of modification and re-submission. Information and opinions provided must be based on evidence and/or experience reflecting the best of the Expert's knowledge. The information or opinions given by the Expert does not constitute any guarantee of performance, marketability or suitability for a particular purpose of the candidate Solution. The SIF declines any responsibility for the accuracy and completeness of the information provided by Experts or Solution providers. If doubts about the accuracy of the information provided by the Expert are raised by the SIF, affiliates, or external parties, and if these doubts cannot be resolved, the SIF reserves the right not to take into account the information provided by the Expert.