

**WORLD
ALLIANCE**
for EFFICIENT
SOLUTIONS

by
SOLARIMPULSE
FOUNDATION



ROLES & CONDITIONS FOR EXPERTS



0 PREAMBLE	
1 POSSIBLE ROLES	3
1.1 CANDIDATE SOLUTIONS ASSESSOR	3
1.2 MEMBER OF THE SENIOR EXPERT GROUP	4
2 EXPERT'S WORK CONDITIONS	4
2.1 BECOMING AN EXPERT	4
2.1.1 Required Competencies	4
2.2 REGISTRATION PROCESS	5
2.3 ASSESSING OF CANDIDATE SOLUTIONS	6
2.3.1 Task Assignment	6
2.3.2 Assessment of Candidate Solutions	6
2.4 SENIOR EXPERTS GROUP	7
2.4.1 The task of a Senior Expert	7
2.4.2 Selection and invitation of a Senior Expert for a task	7
2.4.3 Final Assessment	7
2.4.4 Qualification to become a Senior Expert	7
3 TERMS AND CONDITIONS FOR EXPERTS	8
3.1 EXPERT COMMITMENT	8
3.2 PRIVACY AND USE OF EXPERT'S GIVEN INFORMATION	8
3.3 CORRESPONDENCE BETWEEN EXPERTS AND THE WORLD ALLIANCE	8
3.4 CONFIDENTIALITY	8
3.5 CONFLICTS OF INTEREST	9
3.5.1 Prevention measures	9
3.5.2 Consequences of a conflict of interest	10
3.6 RESPONSIBILITY OF EXPERTS TO PROVIDE HIGH QUALITY INFORMATION	10
3.7 AMOUNT OF CONTRIBUTION	10
3.8 REMUNERATION	11
3.9 PLACE OF WORK	11
4 GOVERNING LAW AND JURISDICTION	11

0 PREAMBLE

Following the success of the first solar flight around the world, the Solar Impulse Foundation has launched the second phase of its action: selecting 1000 Efficient Solutions that can protect the environment in a profitable way, and bring them to decision makers to encourage them to adopt more ambitious environmental targets and energy policies.

The World Alliance for Efficient Solutions, established by the Solar Impulse Foundation, brings together the main actors involved in developing, financing or promoting the use of profitable solutions to protect the environment, encompassing products, services, processes and technologies.

Through independent experts and recognized institutions, we will assess solutions submitted by Members of the World Alliance, and selecting 1000 of them which we will be awarded the label of a Solar Impulse Efficient Solution and presented to governments, businesses and institutions at COP24 to encourage them to adopt more ambitious environmental targets and energy policies.

Experts will be asked to assess the technological feasibility, environmental and socio-economic benefits, and economic profitability of the solutions assigned to them, providing ratings and comments that will help determine whether a solution is to be considered an Efficient Solution.

So as to coordinate all expert actions in an efficient and compliant manner, each expert must register as part of the World Alliance Expert Pool (read section 2.1 & 2.2).

1 POSSIBLE ROLES

Within the Expert Pool, individuals are currently able to apply to be a Candidate Solutions Assessor - the primary need of the World Alliance during this phase of the initiative. A small number of experienced individuals from the Expert Pool will also be invited to join the Senior Expert Group.

In the future there will be additional roles, and the document will be updated at that point.

1.1 CANDIDATE SOLUTIONS ASSESSOR

Assessors will be assigned to assess solutions submitted by members of the World Alliance that have been pre-screened internally by staff to ensure the submission is in scope and of the requisite quality. As part of the assessment, Assessors are asked provide ratings and comments based on the criteria and in accordance with the methodology developed by the World Alliance (see [Efficiency Assessment Guidelines for Experts](#)). This assessment is performed by two different experts performing their own assessments, and these inputs will inform the decision as to whether or not a candidate solution meets the definition of an “Efficient Solution” (see [Standards for the](#)

Solar Impulse “Efficient Solution” Label). Please note that while the result of the assessment plays a key role in identifying which candidate solutions are to be labelled, the final decision lies with the World Alliance Selection Group (WASG).

1.2 MEMBER OF THE SENIOR EXPERT GROUP

If there is a need for greater clarity following the assessments performed for each solution, members of the Senior Expert Group (SEG) will be invited to provide a final assessment in addition to those of previous experts. See the Senior Expert Group section below for more info.

2 EXPERT’S WORK CONDITIONS

2.1 BECOMING AN EXPERT

2.1.1 Required Competencies

The opportunity to become an expert for the World Alliance is open to any individual able to demonstrate;

- A minimum of five years work/research experience (in total) closely linked to one or more of the five Sustainable Development Goals relevant to the project (6 – Clean Water and Sanitation, 7 – Affordable and Clean Energy, 9 – Industry, Innovation and Infrastructure, 11 – Sustainable Cities and Communities, 12 – Responsible Consumption and Production)
- and covering one or several of the following three assessment criteria:
 - Technological Feasibility,
 - Environmental & Socio-Economic Benefits
 - Economic Profitability

Further, it would be advantageous to:

- Have international work experience.
- Have experience with local markets in various countries.
- Have insights into working with governments and/or industry, as solutions shall be implementable at different scales and different international contexts.
- Be fluent in English.

2.2 REGISTRATION PROCESS

To apply to become an expert, each person must register to the World Alliance Expert Pool, committing to certain rules and to complete their Expert profile at the World Alliance site. This profile will allow the expert manager to ensure each profile is in accordance with the requirements outlined in section 2.1, and also to assign suitable candidate solutions to assess, based on their documented expertise.

Registration steps are in short as follows:

- To start registration, visit the [World Alliance Experts page](#) and fill in the “Create an Expert Account” section with an e-mail and password, and then clicking “Submit.” Experts are requested to use an e-mail address from their organization, if possible).
- Two e-mails are then sent: an account activation e-mail and a welcome message.
- Once the activation link is clicked, the person can login to her/his account anytime and view, update or complete their profile in the “Expert Area”.
- Filling in profile information is essential. We request:
 - Personal & Professional details;
 - Experience (LinkedIn profile or CV);
 - Competency filter: SDGs, technologies + regions of competence;
- Signing the Expert Commitment: While completing the profile, every expert will be asked to electronically sign the [Voluntary Commitment for Experts](#) which reminds and confirms that every expert will act in line with the [Roles and Conditions for Experts](#), the [Standards for the Solar Impulse Efficient Solution Label](#) and the [Efficiency Assessment Guidelines for Experts](#), forming the boundaries of the contribution.
- After filling-in at least all of the mandatory fields for the first time, clicking “for assessment” will alert the World Alliance team.
- Approval: The World Alliance will then review the input. If the information appears complete, correct and in line with the requirements, the World Alliance expert team will approve the registration.
- Expert Pool: After the approval, the expert becomes a member of the World Alliance Expert Pool, able to be assigned solutions to assess.
- An email will be sent to the new expert to confirm finalization.

A step by step guide can be downloaded here: [Expert Registration Help](#)

2.3 ASSESSING OF CANDIDATE SOLUTIONS

The World Alliance Selection Group (WASG) takes the final decision on the attribution of the label to candidate solutions submitted by members of the World Alliance. The assessment by experts is integral to informing this decision. Candidate solutions will be assessed by a minimum of two experts, performing their own, separate assessments, in which they will provide ratings and comments in accordance with the criteria and methodology of the World Alliance, and submitted through the Solution Assessment Form (SAF). The “mean” of these scores and comments are included in the Assessment Summary Report (ASR) – forming the total score of the experts.

2.3.1 Task Assignment

The World Alliance has established a process, used by the World Alliance Expert Managers, to match candidate solutions with relevant experts. Experts are then invited to accept the task (based on interest, availability, capability and non-conflict of interest) of assessing a candidate solution.

Further remarks:

- The selection & assignment of experts will happen on a case-by-case basis.
- Matchmaking of experts and solutions is based on information from the expert profiles.
- The expert will receive an invitation to accept or decline the task, deciding within a week. As it is a voluntary contribution, experts can decline a task without any consequences.
- Being registered as expert does not lead to a fixed set of assignments.

2.3.2 Assessment of Candidate Solutions

Accepting the task grants the expert access to the Solution Assessment Form which includes an in-depth explanation of the solution. The expert has two weeks to assess the candidate solution by providing ratings and to supplement those with comments¹. Once completed, the assessment will become part of the Assessment Summary Report (ASR), which forms an essential element in supporting the World Alliance Selection Group deliberation. Please note that the ASR will be shared with the member that submitted the candidate solution should it fail to be selected in order to provide them with valuable expert feedback. The identity of the expert will of course remain anonymous.

For more detailed information:

- More about the assessment process can be read in the [Efficiency Assessment Guidelines](#).
- More about the solutions selection process can be read in the [Standards for the Label](#).

¹ See document [Efficiency Assessment Guidelines for Experts](#)

2.4 SENIOR EXPERTS GROUP

2.4.1 The task of a Senior Expert

If the ratings from the experts do not enable the WASG to make a final decision, candidate solution may require a further, higher-level review and additional independent assessment.

For this task a very experienced expert will contribute their expertise to formulate an additional, final assessment.

The following cases may be valid reasons to ask for an analysis by a Senior Expert:

- The mean of rating from expert one differs by more than three points from the mean of the ratings from expert two.
- The rating of a single criteria differs by more than three points from the mean of the three other criteria for an expert rating.

2.4.2 Selection and invitation of a Senior Expert for a task

The Senior Experts are selected and contacted in a similar manner as for regular assessments while, taking into consideration not only availability and seniority, but also if the expert can add to those areas of the assessment with lowest confidence level.

2.4.3 Final Assessment

The Senior Expert provides her/his input in an additional field of the Solution Assessment Form based on the previous experts assessments (made available to the selected Senior Expert) and her/his own expertise.

The core purpose of this further assessment is to formulate an opinion on the former ratings and respective comments provided by the first experts during the assessment to give clear arguments as to why one is to be considered more valid than the other.

After the submission the World Alliance will add this input in to the Assessment Summary Report (ASR).

2.4.4 Qualification to become a Senior Experts

- Every expert registered on the World Alliance platform reflecting at least 10 years (in total) of recent working and/or research experience is automatically becoming part of the Senior Expert Group.
- Duration of participation: There is no fixed duration. The participation in the SEG lasts as long as the registration as expert to the World Alliance does.

- Volume of contribution: The number of assessment a senior expert will make will depend on individual decisions made when a candidate solution is assigned to him/her.

3 TERMS AND CONDITIONS FOR EXPERTS

3.1 EXPERT COMMITMENT

During the registration aspiring World Alliance Experts will be asked to sign a commitment to confirm the participation and recognize and approve all relevant terms, references and use of information online. It includes commitments on the tasks and obligations of impartiality and confidentiality. It is important that she/he reads those carefully before signing (See also section "Conflicts of Interest and Confidentiality" below).

The agreement enters into force on the day of signing the [Commitment for Experts](#).

3.2 PRIVACY AND USE OF EXPERT'S GIVEN INFORMATION

The information given on the expert database will not be made visible to the general public. The World Alliance affiliates (members, partners) may receive certain information (not the expert name unless specifically requested by the World Alliance and approved by the expert) from the expert profile. The World Alliance will not provide a cross visibility among the registered experts. The expert profile will be deleted 2 weeks after the commitment has expired and after all individual expert related tasks have been completed.

3.3 CORRESPONDENCE BETWEEN EXPERTS AND THE WORLD ALLIANCE

All correspondence between the expert and the World Alliance shall be done electronically. This shall happen via the Expert Portal or by mail to expert@solarimpulse.com. The expert shall use the registered professional email address (no Hotmail, Gmail etc. if possible).

3.4 CONFIDENTIALITY

The expert understands that in order to reduce the process complexity and avoid the risk of intellectual property conflicts, the solution providers have been asked by the World Alliance to disclose non-confidential information only. The expert understands that he may nevertheless be disclosed information of a proprietary or confidential nature regarding the respective solution providers, their solution or the World Alliance. Any such proprietary and/or non-public information which is furnished or disclosed by the World Alliance or the solution providers, directly or indirectly, to the expert, regarding the respective solution providers, their solution or the World Alliance, in whatever form and on whatever format, and declared to be, or physically marked as, confidential

(or words of similar effect) or information which the expert may reasonably assume is confidential, shall be deemed "confidential information":

In order to enable the World Alliance to maintain an impartial and anonymous selection and an effective promotion of solutions, thereby protecting all members of the World Alliance, the expert shall at all times hold with care and in strict confidence all of the confidential information. The expert shall treat confidential information as company secrets entrusted to him/her with at least the same care the expert reserves for his/her own proprietary information of equal importance and, in any event, reasonable standard of care for confidential information. The expert shall in particular not use, copy, reproduce or reverse engineer the confidential information for any purpose other than for assessing the respective solutions, and the expert shall not disclose the confidential information to any third party.

The expert further understands and agrees that he shall have no title or right to the confidential information.

The World Alliance makes no representation or warranty, whether express or implied, regarding the accuracy, reliability, relevance or completeness of the disclosed confidential information and the World Alliance shall have no liability to the expert as a result of the disclosure of confidential information.

The expert shall promptly discontinue any and all use and destroy all confidential information, including any copies, notes extracts or derivative materials based thereon, immediately when such confidential information is no longer needed for the assessment of the respective solutions, when the expert ceases to be an expert, or upon earlier request addressed to the expert by the World Alliance.

However, as the World Alliance has the role to promote selected and published solutions, the World Alliance also encourage experts to promote published solutions they have worked on, using only public information made available on the World Alliance website which are not confidential information. The World Alliance will inform experts about those selected solutions, e.g. via newsletters.

3.5 CONFLICTS OF INTEREST

The World Alliance is open to all organizations offering value to the 5 SDGs relevant to this project and allows organizations to offer solutions and experts at the same time to utilize the capacities and competencies of each organization. To prevent and mitigate conflicts of interests during the assessment, the World Alliance takes and requests actions from experts as follows.

3.5.1 Prevention measures

When assigning an expert on a task, the World Alliance ensures - to the best of its knowledge - that each expert does not have a conflict of interest related to the task being assigned to.

The World Alliance takes several precautions to prevent a conflict of interest.

- The solution provider can deselect companies of concern.

- If an organization offers a candidate solution, its experts will be excluded from the assessment automatically.
- An individual person is asked and the website is programmed in that way to sign-on either as experts or as solution providers, but not both.

In case the World Alliance proposes tasks to an expert for which the expert has a vested interest and which could influence their impartiality, the expert has the responsibility to indicate and decline such offered tasks. The commitment which the expert signs includes a declaration that the expert will avoid conflict of interest and in case it appears will declare it to initiate counter measures.

3.5.2 Consequences of a conflict of interest

To avoid situations of conflicts of interest, the World Alliance may withdraw experts from evaluation duties if it deems necessary. Such experts will be informed and advised about needed actions. If an expert knowingly conceals a conflict of interest and this is discovered during her/his activities as an expert, expert will be dismissed with immediate effect, the remaining tasks and agreements will be terminated.

Example: Submitting proposals through a 3rd party to be considered in the solution catalogue while assessing the same candidate solution as an expert

3.6 RESPONSIBILITY OF EXPERTS TO PROVIDE HIGH QUALITY INFORMATION

It is the solution provider's responsibility to offer correct, consistent information about the candidate solution.

The expert is responsible to endeavor to give an accurate, impartial assessment using the most current techniques as practical at the time of the assessment. Information and opinions provided shall be evidence and/or experience based and reflect the best of the expert's knowledge. Any information or opinion given by the expert does not constitute any warranty of performance, merchantability or fitness for a particular use of the assessed candidate solution.

The World Alliance does not assume any liability whatsoever for the accuracy and completeness of the information provided by experts or solution providers. If concerns about the correctness of the expert provided information are raised by the World Alliance, its affiliates or external parties, and if such concerns can't be resolved, then the World Alliance will take the freedom to disregard the information provided by the expert.

3.7 AMOUNT OF CONTRIBUTION

The involvement of each expert may vary over time depending on the possible tasks, personal fit to available candidate solutions and very importantly the availability of the expert. Assessing a candidate solution should take the expert between 120 and 180 minutes in total. With this in mind, the expert can accept or decline assignment depending on its current availability.

3.8 REMUNERATION

Although the expert's contribution is very much appreciated, the World Alliance is not able to offer any financial remuneration or support (daily rate, travel expenses etc.) to compensate for her/his efforts. The Alliance will ensure that the expert's involvement will not require mandatory financial expenses to accomplish the tasks. The World Alliance guarantees that all the candidate solution assessment work can be done remotely from home or the workplace.

3.9 PLACE OF WORK

Experts can perform their work either from home or place of work (remote). Special sessions or events, involving multiple stakeholders (e.g. experts, solutions providers, World Alliance staff), may take place either at the World Alliance office in Lausanne, Switzerland or 3rd party premises.

4 GOVERNING LAW AND JURISDICTION

This document and all related documents, shall be governed exclusively by Swiss substantive law. Any dispute arising out of, or in connection with this or any related document, shall be subject to the exclusive jurisdiction of the courts of Lausanne, Switzerland, reserving any appeal to the Swiss Supreme Court.