



EUROPEAN COMMISSION

DIRECTORATE-GENERAL

Directorate C - Renewables, Research and Innovation, Energy Efficiency

**CALL FOR TENDERS**

**ENER/C3/2014-819**

**Pilot Project for Blueprint and Demonstration of Technical  
Control System to Increase the Total Efficiency of District  
Heating and Cooling Networks**

**TENDER SPECIFICATIONS**

## TABLE OF CONTENTS

1.	INFORMATION ON TENDERING.....	3
1.1.	Participation.....	3
1.2.	Contractual conditions.....	3
1.3.	Joint tenders.....	3
1.4.	Subcontracting.....	4
1.5.	Content of the tender.....	4
1.6.	Identification of the tenderer: legal capacity and status.....	4
2.	EVALUATION AND AWARD.....	5
2.1.	Evaluation steps.....	5
2.2.	Exclusion criteria.....	5
2.3.	Selection criteria.....	5
2.4.	Award criteria.....	8
2.5.	Technical offer.....	8
2.6.	Financial offer.....	9
2.7.	Estimate of the amount of work involved.....	9
3.	TECHNICAL SPECIFICATIONS.....	9
3.1.	Introduction and objectives of the study.....	9
3.2.	Description of services.....	10
3.3.	Deliverables.....	11
3.4.	Duration of the tasks and meetings.....	13
3.5.	Organisation of Work.....	14
4.	CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE FINAL DELIVERABLES.....	15
5.	ANNEXES.....	15

## 1. INFORMATION ON TENDERING

### 1.1. Participation

Participation in this tender procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement. Where the Multilateral Agreement on Government Procurement<sup>1</sup> concluded within the WTO applies, the participation to the call for tenders is also open to nationals of the countries that have ratified this Agreement, on the conditions it lays down.

### 1.2. Contractual conditions

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

### 1.3. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (consortium). Joint tenders may include subcontractors in addition to the joint tenderers.

In case of joint tender, all economic operators in a joint tender assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole.

These economic operators shall designate one of them to act as leader with full authority to bind the grouping or the consortium and each of its members. It shall be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration and for coordination. The composition and constitution of the grouping or consortium, and the allocation of the scope of tasks amongst the members, shall not be altered without the prior written consent of the Commission.

The tenderers should indicate in their offer whether the partnership takes the form of:

a) a new or existing legal entity which will sign the contract with the Commission in case of award

or

b) a group of partners not constituting a new legal entity, who via a power of attorney, signed by an authorised representative of each partner (except the lead partner), designate one of the partners as lead partner, and mandate him as lead contractor to sign the contract with the Commission in case of award.

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<sup>1</sup> See [http://www.wto.org/english/tratop\\_E/gproc\\_e/gp\\_gpa\\_e.htm](http://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm)

#### 1.4. Subcontracting

Subcontracting is permitted in the tender but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers must give an indication of the part of the services and proportion of the contract that they intend to subcontract.

Tenderers are required to identify subcontractors whose share of the contract is above 20%.

During contract execution, the change of any subcontractor identified in the tender will be subject to prior written approval of the Contracting Authority.

#### 1.5. Content of the tender

The tenders must be presented as follows:

Part A: Identification of the tenderer (see section 1.6)

Part B: Evidence for exclusion criteria (see section 2.2)

Part C: Evidence for selection criteria (see section 2.3)

Part D: Technical offer (see section 2.5)

Part E: Financial offer (see section 2.6)

Part F: Power of attorney (for consortia only)

#### 1.6. Identification of the tenderer: legal capacity and status

- The tenderer's identification form in **Annex 1** shall be filled in and signed by:
  - The tenderer (including any member of a consortium or grouping)
  - Subcontractor(s) whose share of the work is expected to represent more than 20% for some specific contracts.
- In order to prove their legal capacity and their status, all tenderers (including any member of a consortium or grouping) must provide a signed **Legal Entity Form with its supporting evidence**. The form is available on:  
[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)

Tenderers that are already registered in the Contracting Authority's accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.

- If it has not been included with the Legal Entity Form, tenderers must provide the following information
  - For legal persons, a legible copy of the notice of appointment of the **persons authorised to represent the tenderer** in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. Any

delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

- For natural persons, where applicable, a proof of registration on a professional or trade register or any other official document showing the registration number.

- The tenderer (only the leader in case of joint tender) must provide a **Financial Identification Form and supporting** documents. The form is available on: [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/index\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm)

## **2. EVALUATION AND AWARD**

### **2.1. Evaluation steps**

The evaluation is based on the information provided in the submitted tender. It takes place in three steps:

- (1) Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- (2) Selection of tenderers on the basis of selection criteria
- (3) Evaluation of tenders on the basis of the award criteria (technical and financial evaluation)

Only tenders meeting the requirements of one step will pass on to the next step.

### **2.2. Exclusion criteria**

All tenderers shall provide a declaration on their honour (see Annex 2), duly signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in the Annex 2.

The declaration on honour is also required for identified subcontractors whose intended share of the contract is expected to be above 20%.

The successful tenderer shall provide the documents mentioned as supporting evidence in Annex 2 before signature of the contract and within a deadline given by the contracting authority. This requirement applies to all members of the consortium in case of joint tender. In case of doubt on this declaration on the honour, the contracting authority may also request the evidence for subcontractors whose intended share of the contract is above 20%.

### **2.3. Selection criteria**

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this call for tenders.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

### **2.3.1. Economic and financial capacity criteria and evidence**

In order to prove their economic and financial capacity, the tenderer (in case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The tenderer (or, for a consortium, total turnover of its members) must have an average annual turnover of each of the last two financial years for which the accounts are closed of at least EUR 3.5 million.

The following evidence should be provided:

- Copy of the profit & loss account for the last two years for which accounts have been closed,
- Failing that, appropriate statements from banks,

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, he or she may prove his or her economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification in the tender. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

### **2.3.2. Technical and professional capacity criteria and evidence**

#### **a. Criteria relating to tenderers**

Tenderers (in case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The tenderer must prove experience in the field of modern, new generation (low temperature) and conventional district heating systems, with intelligent metering, sensor, dispatching and energy control mechanisms and the operation of smart grids for heating with at least three projects delivered in this field in the last three years with a minimum value for each project of €2 million.
- The tenderer must prove experience of working and drafting reports in English language with at least three projects delivered in the last three years showing the necessary language coverage.
- The tenderer must prove experience of working in at least three EU countries with at least three projects delivered in the last three years, the combination of which must show the necessary geographical coverage.
- The tenderer must prove experience in engineering of modern, new generation (low temperature), as well as conventional district heating and cooling systems, including experience in constructing the pipe networks, the generation, back-up, ancillary and storage units using the various conventional, renewable energy and waste heat sources. It must have proven track record in designing and operating the control, measurement, monitoring dispatching systems, and systems that manage variable energy supply sources and variable loads and storage. Proven experience with building and operating smart district heating systems and the related information technology systems, proven capacity of designing algorithms and modelling energy flows are central qualifying conditions. Experience with the technical requirements of connecting low energy buildings to district heating systems (existing and new) and the impact of energy

efficiency improvement measures in buildings on the buildings' heating systems and requirements is equally important.

**b. Criteria relating to the team delivering the service:**

The team delivering the service should include, as a minimum, the following profiles:

Project Manager: At least 10 years experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of at least 2 million, with experience in management of team of at least 10 people.

Lead expert in smart district heating engineering: Relevant higher education degree and at least 7 years' professional experience in the field of designing, building and operating district heating systems (smart, conventional and new generation or low energy district heating systems) covering the pipe systems, generation, back-up and ancillary units, substations, buildings' heating systems, and the related conventional, renewable and waste heat based generation technologies, heat load and energy storage management and the technical requirements of buildings' heating systems, including low energy buildings. The lead expert must have experience in testing and demonstrating new and innovative district heating projects.

A team of at least 5 experts, having relevant higher education degree and at least 2 years professional experience, should provide collectively knowledge, expertise and experience in the following fields:

- design of algorithms,
- design, construction and operation of intelligent, new generation, as well as conventional district heating networks and the related control systems,
- dispatching and operation of generation and storage units,
- conventional, renewable and waste heat based generation technologies,
- energy efficient district heat piping technologies,
- managing and optimising variable heat loads and the variable supply from renewable energies,
- linking up with electricity systems,
- installation and operation of intelligent control and dispatching systems and the connection technologies of buildings (new, refurbished, old) with district heating systems,
- metering of heating
- managing of heat customers

The project manager, the leader expert and at least 3 members of the team should have proficiency level language skills in English, as guaranteed by a certificate or past relevant experience.

**c. Evidence:**

The following evidence should be provided to fulfil the above criteria:

- **List of relevant services** provided in the past three years, with sums, dates and recipients, public or private.
- **The educational and professional qualifications of the persons who will provide the service for this tender (CVs)** including the management staff. Each CV provided should indicate the intended function in the delivery of the service.

#### 2.4. Award criteria

The tender will be awarded according to the best-value-for -money procedure. The quality of the tender will be evaluated based on the following criteria. The maximum total quality score is 100 points.

	Award criteria	Weighting
1.	Design, efficiency and robustness of the technical and organisation approach to develop the blueprint of the control systems and conduct the test runs	50
2.	Operationability, service ability and replicability of the proposed solutions	40
3.	Certification, qualification, technical documentation and risk management	10

Tenders must score minimum 60% for each criterion and minimum 70% in total. Tenders that do not reach the minimum quality thresholds will be rejected and will not be ranked.

After evaluation of the quality of the tender, the tenders are ranked using the formula below to determine the tender offering best value for money. A weight of 70/30 is given to quality and price.

$$\text{Score for tender x} = \frac{\text{Total quality score for award criteria for tender x}}{100} \text{ Multiplied by } 0.7 + \frac{\text{Price of the lowest tender}}{\text{Price of tender x}} \text{ Multiplied by } 0.3$$

#### 2.5. Technical offer

The technical offer must cover all aspects and tasks required in the technical specifications, include at least the proposal for three possible sites for the test runs and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all requirements may be excluded on the basis of non-conformity with the tender specifications and not evaluated.



## **2.6. Financial offer**

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

The indicative maximum price for this project is EUR 1,750,000.00 [one million seven hundred and fifty thousand euros]

## **2.7. Estimate of the amount of work involved**

It is up to the tenderer to submit a financial proposal on the basis of his estimation of the number of man-days needed to perform the requested services.

# **3. TECHNICAL SPECIFICATIONS**

## **3.1. Introduction and objectives of the study**

Efficient district heating and cooling systems can be an effective instrument to increase the efficiency of heating and cooling in buildings and in industry. District heating and cooling provides flexibility in the source of supply, because it can integrate multiple sources of low carbon and renewable energy, and efficient generation units and capability. District heating and cooling offers economies of scale, when they replace individual equipments and aggregate demand from many diffuse individual consumption points. Efficient district heating and cooling can help the deployment of renewable energies and tap on waste heat sources, which otherwise would not be accessible for individual heating solutions. District heating and cooling provides flexibility also because they can help optimise the use of local renewable energies, such as solar and geothermal energy, and of waste heat by selecting the appropriate generation technologies, by integrating energy storage and by using intelligent control systems to optimally match variable supply and loads. Intelligent control systems and adapted interfaces, including substations, capable of connecting with low-energy buildings equipped with low-temperature heating systems are essential to ensure that next generation district heating and cooling bring the level of energy efficiency improvement required to reach EU energy and climate goals.

The increased deployment of efficient district heating and cooling (DHC) using renewable and low carbon energy sources, such as cogeneration and waste heat recovery, is supported by EU policies and legislation. The Energy Efficiency Directive requires Member States to regularly assess, develop and implement national cost-effective potentials for DHC, including through public support, policies and regulations. The Renewable Energy Directive promotes DHC as a means to increase the share of renewable energy sources in heating and cooling. The EU

Energy Union's Strategic Framework makes an EU Strategy for Heating and Cooling part of the roadmap towards the Energy Union and a key element of the energy efficiency dimension.

In Europe district heating and cooling already plays an important role and supply around 12% of heating and cooling. For district heating and cooling to become a more significant vehicle of delivering energy efficiency and renewable energy, technological development is essential to adapt to the transformation of the EU building stock into low energy buildings through building renovation and the requirement for all new buildings to become nearly-zero energy buildings starting from 2018 as required by the EU Energy Performance of Buildings Directive. For DHC to become an instrument of large scale use of variable renewable heat and electricity in the EU's energy system, it must be able to integrate multiple supply and generation sources, energy storage and intelligent control systems.

The Pilot should contribute to developing the next generation district heating and cooling by integrating the intelligent use and control of distributed energy storage systems in the network; improving design and control of substations in the building; integrating multiple thermal generation inputs (renewable solar thermal, geothermal, waste heat, cogeneration) and storage, and to providing solutions for intelligent control of the overall network, in particular the thermal energy demand of the connected buildings, and both distributed and collective thermal energy storage systems.

The overall objective is to increase the overall efficiency of the thermal network, by inter alia minimising losses and improving system integration with buildings (a 20% primary energy consumption reduction is foreseen), and thus contribute to the promotion of efficient district heating and cooling networks as provided in Article 14 of the Energy Efficiency Directive. The Pilot will equally contribute to help promote the deployment of renewable energy via district heating and cooling networks as required by Directive 2009/28/EC on renewable energy and the take up of district heating and cooling as part of solutions for sustainable low or nearly-zero energy buildings under Directive 2010/31/EU on the energy performance of buildings.

### **3.2. Description of services**

The Pilot Project will provide replicable solutions to the following main elements:

- Blueprint and the technical study of the control systems and the design of the related technical specifications needed for a district heating system supplying low energy buildings from multiple renewable and low carbon supply sources and integrating energy storage;
- Demonstration of the blueprint and the functioning of the designed district heating system in a group of at least 60 buildings, which some of them are to be connected within the framework of the pilot project.
- Technical specifications, installation instructions and quality control measures and protocols to replicate the results of the Pilot Projects in other efficient district heating systems enabling to be connected and supply low energy buildings.

Task 1: Elaborate a smart control algorithm for operating multiple generation sources and units, distributed thermal energy storage and substations. The algorithm must be capable to optimise the load variations during the day and throughout seasons and dispatch the optimal mix of generation and storage units;

Task 2: Design a low cost replicable system to determine, match and control the available generation sources (including variable renewable energy) and units, the thermal load and the state of charge of storage, including compact distributed thermal energy storage systems in the buildings;

Task 3: Design low-temperature substations that can be adapted to buildings that underwent deep energy renovation with significantly improved efficiency performance and to new low-energy buildings;

Task 4: Design the overall control scheme for the district heating system with multiple generation units and energy storage connected to low energy buildings. The design is to cover the network, the supply sources and generation units, the load and sub-stations, and storage and provide the solutions to cope with the unbalance between multiple (unpredictable) renewable heat sources and thermal energy needs of the connected buildings. Task 4 is to cover all results under Task 1-3 and integrate them into the overall systems scheme. It will provide the blue print and feasibility study for the system demonstration planned for the second stage of the pilot. The control scheme must provide replicable solutions for other district heating systems that can be connected and supply low energy buildings.

Task 5: Conduct at least three test runs and the demonstration of the technical and system solutions on a site would cover of approximately 60 buildings, from which some of them are to be connected within the framework of the pilot project.

Task 6: Provide the technical specifications, installation instructions and quality control measures and protocols needed to make the results of the Pilot Project replicable in other efficient district heating systems (new generation district heating system or modernised and refurbished traditional district heating systems) enabling to be connected and supply low energy buildings.

### **3.3. Deliverables**

#### Deliverable 1

The first package of deliverables provides the study work, blueprints, technical specifications and descriptions resulting from Task 1-4. It should include 1) the smart control algorithm for operating multiple generation sources and units, distributed thermal energy storage and substations; 2) the design of a low cost system to determine, match and control the available generation sources and units, the thermal load and the state of charge of storage, including compact distributed thermal energy storage systems in the buildings; 3) the design low-temperature substations that can be adapted to buildings that underwent deep energy renovation with significantly improved efficiency performance and to new low-energy buildings; and 4) the design of the overall control scheme for the district heating system with multiple generation units and energy storage connected to low energy buildings. The design is to cover the network, the supply sources and generation units, the load, the sub-stations, and storage and provide the solutions to cope with the unbalance between multiple (unpredictable) renewable heat sources and the thermal energy needs of the connected buildings.

#### Deliverable 2

The second package of deliverables must provide at least three well-documented test runs under different energy supply availability and load situations and the demonstration of the technical and system solutions on a site of approximately 60 buildings, from which some of them are to be connected within the framework of the pilot project. The description of the test runs and demonstration and the documentation of the results are part of Deliverable 2.

### Deliverable 3

The third package of deliverables must provide the technical specifications, installation instructions and quality control measures and protocols needed to make the results of Pilot Project replicable in other efficient district heating systems (new generation district heating system or modernised and refurbished traditional district heating systems) enabling to be connected and supply low energy buildings.

A 1<sup>st</sup> progress report showing the results of Task 1-3 shall be submitted to the Commission at the latest 4 months after the entry into force of the contract. The 1<sup>st</sup> progress report shall include a well-documented and reasoned proposal for at least three demonstration sites well suited to test and demonstrate the blue print and the design of the technical systems. Within a month from receiving the 1<sup>st</sup> progress report, the Commission will provide comments and may request the change of the demonstration sites. The 1<sup>st</sup> progress report, the proposed sites and the Commission's comments will be discussed in a meeting that will take place in Brussels within a month from the day the Commission received the 1<sup>st</sup> progress report. The Commission's approval is needed to select the site of the demonstration.

A 2<sup>nd</sup> progress report showing the Deliverable 1 under Task 1-4 shall be submitted to the Commission at the latest 11 months after the entry into force of the contract. The Commission within a month from receiving the 2<sup>nd</sup> progress report will provide comments, which will include the Commission's views whether the test runs may be started. The 2<sup>nd</sup> progress report, the results under Deliverable 1 and issues related to starting of the test runs and the Commission's comments will be discussed in a meeting that will take place in Brussels within a month from the day the Commission received the 2<sup>nd</sup> progress report.

A 3<sup>rd</sup> progress report showing the results of the three test runs and the demonstration documentation under Deliverable 2 shall be submitted to the Commission at the latest 19 months after the entry into force of the contract. The 3<sup>rd</sup> progress report will contain the draft technical specifications, installation instructions and quality control measures and protocols for the installation and replications of the solutions under Deliverable 3. Within a month after the submission of the 3<sup>rd</sup> progress report, the contractor will organise a **study visit** on the demonstration site to allow the Commission to appraise the progress and the results of the testing and demonstration. The study visit will be linked with a meeting of the contractor and the Commission to discuss the progress and the results of the Pilot Project under Tasks 1-5.

### Final part

The draft of the final technical study, including the blueprints, technical specifications and description of the solutions, the full documentation of the results of the test runs and the demonstration, and the technical specifications and installations instructions under Task 1-6 shall be submitted to the Commission at the latest 22 months after the entry into force of the contract. The Commission will have 30 days to provide the Contractor with its comments.

A final meeting will be organised in Brussels in order to discuss the Commission's observations following the submission of the documents above.

The Final output and deliverable will include the final technical study containing the blueprints and designs, the related technical specifications and descriptions under Task 1-4, the full documentation of the results of the test runs and the demonstration under Task 5. It will provide the technical specifications, installation instructions and quality control measures and the protocol under Task 6. The final technical study will be accompanied with visual recording and DVD of the test runs and demonstration. The contractor will provide a short written summary of the Pilot Project in clear, easy-to-understand language together with a short promotional video suitable for distribution to non-technical audience. The contractor will

provide a PowerPoint presentation clearly explaining the Pilot Project with texts, visual means, charts, graphs and pictures. The contractor will make available all technical design documentation and files in the original formats to the Commission.

### 3.4 Duration of the tasks and meetings

**The duration of the tasks shall not exceed 24 months.** This period is calculated in calendar days.

Execution of the tasks begins after the date on which the Contract enters into force.

In principle, the deadlines set out below cannot be extended. The Contractor is deemed solely responsible for delays occasioned by subcontractors or other third parties (except for rare cases of *force majeure*). Adequate resources and appropriate organisation of the work including management of potential delays should be put in place in order to observe the timetable below.

<b>Kick-off meeting</b>	To take place in Brussels at the latest 20 days following the entry into force of the contract, in order to settle all the details of the technical study and the demonstration project.
1 <sup>st</sup> progress report	At the latest 4 months after the entry into force of the contract.
<b>First meeting</b>	To take place within a month after the reception of the 1 <sup>st</sup> progress report and will discuss the 1 <sup>st</sup> progress report, the proposed sites and the Commission comments.
1 <sup>st</sup> Interim payment of 20% of the contract price	After approval of the 1 <sup>st</sup> progress report in accordance with Article I.4.2. of the service contract
2 <sup>nd</sup> progress report	At the latest 11 months after the entry into force of the contract.
<b>Second meeting</b>	To take place within a month after the submission of the 2 <sup>nd</sup> report and will discuss the results under Deliverable 1 and issues related to starting of the test runs.
Interim payment of 40% of the contract price	After approval of the 2 <sup>nd</sup> progress report in accordance with Article I.4.2. of the service contract
3 <sup>rd</sup> progress report	At the latest 19 months after the entry into force of the contract.
<b>Third meeting</b>	To take place and linked to the visit of the demonstration site after the submission of the 3 <sup>rd</sup> progress report.
Draft of the final technical study and accompanying deliverables	At the latest 22 months after the entry into force of the contract.

<b>Final meeting</b>	To be organised in Brussels to discuss the Commission's observations following the submission of the draft final technical study report. The exact date will be agreed upon with the Contractor.
Final technical study and accompanying deliverables	At the latest 24 months after the entry into force of the contract.
Final payment	In accordance with Article I.4.3 of the contract.

### 3.5 Organisation of Work

#### Place of performance

The tasks will be performed on the Contractor's premises. However, meetings between the Contractor and the Commission may be held on Commission premises in Brussels.

#### Availability of information

As mentioned above, the Contractor will be responsible for the data collection, including on the ground data collection in the selected MSs.

#### Language

The Communication language between the Commission and the Contractor shall be in English.

## 4. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE FINAL DELIVERABLES

All studies produced for the European Commission and Executive Agencies shall conform to the corporate visual identity of the European Commission by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo<sup>2</sup>.

The Commission is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. The Commission supports the [Web Content Accessibility Guidelines 2.0](#) of the W3C.

For full details on Commission policy on accessibility for information providers, see: [http://ec.europa.eu/ipg/standards/accessibility/index\\_en.htm](http://ec.europa.eu/ipg/standards/accessibility/index_en.htm)

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<sup>2</sup> The Visual Identity Manual of the European Commission is available upon request. Requests should be made to the following e-mail address: [comm-visual-identity@ec.europa.eu](mailto:comm-visual-identity@ec.europa.eu)

**5. ANNEXES**

1. Tenderer 's Identification Form
2. Declaration related to the exclusion criteria and absence of conflict of interest
3. Power of Attorney (mandate in case of joint tender)
4. Draft Contract

## ANNEX 1

### IDENTIFICATION OF THE TENDERER

(Each service provider, including any member of a consortium or grouping and subcontractor(s) whose share of the work is more than 20% of the contract must complete and sign this identification form)

<b>Identity</b>	
Name of the tenderer	
Legal status of the tenderer	
Date of registration	
Country of registration	
Registration number	
VAT number	
Description of statutory social security cover (at the level of the Member State of origin) and non-statutory cover (supplementary professional indemnity insurance) <sup>3</sup>	
<b>Address</b>	
Address of registered office of tenderer	
Where appropriate, administrative address of tenderer for the purposes of this invitation to tender	
<b>Contact Person</b>	
Surname: First name: Title (e.g. Dr, Mr, Ms) : Position (e.g. manager): Telephone number:	

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<sup>3</sup> For natural persons



Call for tenders ENER/C3/2014-819

Fax number: E-mail address:	
<b>Legal Representatives</b>	
<b>Names and function of legal representatives</b> and of other representatives of the tenderer who are authorised to sign contracts with third parties	
<b>Declaration by an authorised representative of the organisation<sup>4</sup></b>  I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

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<sup>4</sup> This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.

## ANNEX 2

### Declaration of honour on exclusion criteria and absence of conflict of interest

*(Complete or delete the parts in grey italics in parentheses)*

[Choose options for parts in grey between square brackets]

The undersigned (*insert name of the signatory of this form*):

in [his][her] own name (*for a natural person*)

or

representing the following legal person: (*only if the economic operator is a legal person*)

full official name:

official legal form:

full official address:

VAT registration number:

- declares that [the above-mentioned legal person][he][she] is not in one of the following situations:
- a) is bankrupt or being wound up, is having its affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
  - b) has been convicted of an offence concerning professional conduct by a judgment of a competent authority of a Member State which has the force of *res judicata*;
  - c) has been guilty of grave professional misconduct proven by any means which the contracting authorities can justify including by decisions of the European Investment Bank and international organisations;
  - d) is not in compliance with all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be performed;
  - e) has been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation, money laundering or any other illegal activity, where such activity is detrimental to the Union's financial interests;
  - f) is a subject of an administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in a procurement procedure or failing to supply this information, or having been declared to be in serious breach of its obligations under contracts covered by the Union's budget.
- (*Only for legal persons other than Member States and local authorities, otherwise delete*) declares that the natural persons with power of representation, decision-

making or control<sup>5</sup> over the above-mentioned legal entity are not in the situations referred to in b) and e) above;

- declares that [the above-mentioned legal person][he][she]:
  - g) has no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinity, family, emotional life or any other shared interest;
  - h) will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;
  - i) has not granted and will not grant, has not sought and will not seek, has not attempted and will not attempt to obtain, and has not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, where such advantage constitutes an illegal practice or involves corruption, either directly or indirectly, inasmuch as it is an incentive or reward relating to award of the contract;
  - j) provided accurate, sincere and complete information to the contracting authority within the context of this procurement procedure ;
- acknowledges that [the above-mentioned legal person][he][she] may be subject to administrative and financial penalties<sup>6</sup> if any of the declarations or information provided prove to be false.

In case of award of contract, the following evidence shall be provided upon request and within the time limit set by the contracting authority:

For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the tenderer is a legal person and the national legislation of the country in which the tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the tenderer.

For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

For any of the situations (a), (b), (d) or (e), where any document described in two paragraphs above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

If the tenderer is a legal person, information on the natural persons with power of representation, decision making or control over the legal person shall be provided only upon request by the contracting authority.

Full name	Date	Signature
_____		

<sup>5</sup> This covers the company directors, members of the management or supervisory bodies, and cases where one natural person holds a majority of shares.

<sup>6</sup> As provided for in Article 109 of the Financial Regulation (EU, Euratom) 966/2012 and Article 145 of the Rules of Application of the Financial Regulation

**ANNEX 3**  
**POWER OF ATTORNEY**

**mandating one of the partners in a joint tender as lead partner and lead contractor<sup>7</sup>**

The undersigned:  
– Signatory (Name, Function, Company, Registered address, VAT Number)

having the legal capacity required to act on behalf of his/her company,

HEREBY AGREES TO THE FOLLOWING:

- 1) To submit a tender as a partner in the group of partners constituted by Company 1, Company 2, Company N, and led by Company X, in accordance with the conditions specified in the tender specifications and the terms specified in the tender to which this power of attorney is attached.
- 2) If the European Commission awards the Contract to the group of partners constituted by Company 1, Company 2, Company N, and led by Company X on the basis of the joint tender to which this power of attorney is attached, all the partners shall be co-signatories of the Contract in accordance with the following conditions:
  - (a) All partners shall be jointly and severally liable towards the European Commission for the performance of the Contract.
  - (b) All partners shall comply with the terms and conditions of the Contract and ensure the proper delivery of their respective share of the services and/or supplies subject to the Contract.
- 1) Payments by the European Commission related to the services and/or supplies subject to the Contract shall be made through the lead partner's bank account: [Provide details on bank, address, account number].
- 2) The partners grant to the lead partner all the necessary powers to act on their behalf in the submission of the tender and conclusion of the Contract, including:
  - (a) The lead partner shall submit the tender on behalf of the group of partners.
  - (b) The lead partner shall sign any contractual documents — including the Contract, and Amendments thereto — and issue any invoices related to the Services on behalf of the group of partners.
  - (c) The lead partner shall act as a single contact point with the European Commission in the delivery of the services and/or supplies subject to the Contract. It shall co-ordinate the delivery of the services and/or supplies by the group of partners to the European Commission, and shall see to a proper administration of the Contract.

Any modification to the present power of attorney shall be subject to the European Commission's express approval. This power of attorney shall expire when all the contractual obligations of the group of partners towards the European Commission for the delivery of the services and/or supplies subject to the Contract have ceased to exist. The parties cannot terminate it before that date without the Commission's consent.

Signed in ..... on [dd/mm/yyyy]

Place and date:

Name (in capital letters), function, company and signature:

**ANNEX 4**

<sup>7</sup> To be filled in and signed by each partner in a joint tender except the lead partner.

**DRAFT CONTRACT**

*Please see separate document*