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**Belgium-Brussels: Study on the macroeconomics of energy and climate policies
2015/S 089-159373**

Contract notice

Services

Directive 2004/18/EC

Section I: Contracting authority

I.1) Name, addresses and contact point(s)

European Commission, Directorate-General for Energy, Unit A4
rue Jean-André Demot 24
For the attention of: Stefaan Vergote
1049 Brussels
BELGIUM
Telephone: +32 22959857
E-mail: ener-macroeco-energy-climate@ec.europa.eu

Internet address(es):

General address of the contracting authority: <http://ec.europa.eu/energy/>
Electronic access to information: <http://ec.europa.eu/energy/en/funding-and-contracts/calls-tender>

Further information can be obtained from: The above mentioned contact point(s)

Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained from: The above mentioned contact point(s)

Tenders or requests to participate must be sent to: The above mentioned contact point(s)

I.2) Type of the contracting authority

European institution/agency or international organisation

I.3) Main activity

Other: Energy policies.

I.4) Contract award on behalf of other contracting authorities

The contracting authority is purchasing on behalf of other contracting authorities: no

Section II: Object of the contract

II.1) Description

II.1.1) Title attributed to the contract by the contracting authority:

Study on the macroeconomics of energy and climate policies.

II.1.2) Type of contract and location of works, place of delivery or of performance

Services

Service category No 11: Management consulting services [6] and related services

Main site or location of works, place of delivery or of performance: The task will be performed on the contractor's premises. However, meetings between the contractor and the Commission shall be held on Commission premises in Brussels. Meetings may also be held occasionally on the contractor's premises, in order to gain closer insights into the work performed (if deemed helpful).

NUTS code

II.1.3) Information about a public contract, a framework agreement or a dynamic purchasing system (DPS)

The notice involves a public contract

II.1.4) Information on framework agreement

II.1.5) Short description of the contract or purchase(s)

The general objective of this invitation to tender is to improve understanding on the interactions between the macroeconomy, the energy sector, and EU policy, with an emphasis on energy technological innovation and the relevance of the monetary economy. The study is intended to use existing models, tools and methods available in the relevant literature, with limited scope for model development per se, having in mind the 2-year time-frame of the project and the wide scope of the topics to be covered. The study is also intended to complement existing analytical efforts undertaken by the Commission.

Several specific objectives are required of the analytical expertise and assessment that is to be provided. These specific objectives should not be taken in isolation, but rather in an interrelated manner. This is because the value added that this call is seeking rests with the integration of these specific objectives under a common umbrella or unified framework.

— The analysis should focus on the contribution of policy-induced technological innovation towards decarbonising energy systems, making these more efficient and adaptive to international competitiveness pressures.

— The analysis should address the role of public and private finance and the monetary economy in interacting with the real economy, and influencing and being influenced by energy-related policies and investments in low-carbon energy (including efficiency) technologies.

— The analysis should be able to explain past key energy economy trends, as well as simulate likely future developments and impacts, in the short- to medium- and long-term (up to 2050).

— The analysis should outline not only the risks and costs for the EU energy sector of varying policy scenarios, but also report on potential EU economy-wide impacts. It should allow for interactions between energy, the macroeconomy, and the global economy, and provide insights in addition to those of the existing literature (including those funded by EU institutions).

II.1.6) Common procurement vocabulary (CPV)

73200000

II.1.7) Information about Government Procurement Agreement (GPA)

The contract is covered by the Government Procurement Agreement (GPA): yes

II.1.8) Lots

This contract is divided into lots: no

II.1.9) Information about variants

Variants will be accepted: no

II.2) Quantity or scope of the contract

II.2.1) Total quantity or scope:

Total duration: 25 months.

Total budget: maximum 1 000 000 EUR.

Estimated value excluding VAT: 1 000 000 EUR

II.2.2) Information about options

Options: no

II.2.3) Information about renewals

This contract is subject to renewal: no

II.3) Duration of the contract or time limit for completion

Duration in months: 25 (from the award of the contract)

Section III: Legal, economic, financial and technical information

III.1) Conditions relating to the contract

III.1.1) Deposits and guarantees required:

III.1.2) Main financing conditions and payment arrangements and/or reference to the relevant provisions governing them:

I.4.1. Interim payments:

The contractor shall submit an invoice for 2 interim payments, each for an amount of EUR (amount in figures and in words), equal to 35 % of the total amount referred to in point II.2.1.

Invoices for both interim payments shall be accompanied by an interim progress report and the payment shall be pre-conditioned on the approval of the preceding deliverables, in accordance with the tender specifications.

The contracting authority shall make the payment within 60 days from receipt of the invoice. The contractor shall have 20 days in which to submit additional information or corrections or a new progress report or documents if required by the contracting authority.

I.4.2. Payment of the balance:

The contractor shall submit an invoice for payment of the balance.

The invoice shall be accompanied by a final report and the payment is pre-conditioned on the approval of a preceding deliverable, in accordance with the tender specifications. The contracting authority shall make the payment within 60 days from receipt of the invoice. The contractor shall have 20 days in which to submit additional information or corrections, a new final progress report or other documents if it is required by the contracting authority.

III.1.3) Legal form to be taken by the group of economic operators to whom the contract is to be awarded:

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 tenderer 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.

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 of the tender specifications);
- part B: evidence for exclusion criteria (see Section 2.2 of the tender specifications);
- part C: evidence for selection criteria (see Section 2.3 of the tender specifications);
- part D: technical offer (see Section 2.5 of the tender specifications);
- part E: financial offer (see Section 2.6 of the tender specifications);
- 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 represents more than 20 % of the contract.

III.1.4) **Other particular conditions**

The performance of the contract is subject to particular conditions: no

III.2) **Conditions for participation**

III.2.1) **Personal situation of economic operators, including requirements relating to enrolment on professional or trade registers**

Information and formalities necessary for evaluating if the requirements are met: — 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

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 the case of a 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

III.2.2) **Economic and financial ability**

Information and formalities necessary for evaluating if the requirements are met: In order to prove their economic and financial capacity, the tenderer (in the case of a joint tender the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

— the annual turnover of a minimum of 500 000 EUR for each of the last 2 financial years for which the accounts have been closed.

The following evidence should be provided:

- copy of the profit & loss account for the last 2 years for which accounts have been closed,
- failing that, appropriate statements from banks, and
- if applicable, evidence of professional risk indemnity insurance.

If, for some exceptional reason which the contracting authority considers justified, a tenderer is unable to provide 1 or the other of the above documents, they 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.

III.2.3) **Technical capacity**

Information and formalities necessary for evaluating if the requirements are met:

a. Criteria relating to tenderers:

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

- the tenderer must prove research and/or analytical experience in the field of EU and international energy and climate policies; in energy system and macroeconomic modelling and analysis (including econometrics); in energy-related (endogenous) technological change and low-carbon innovation; and in interactions between energy, the real economy and the monetary economy and/or financial sector. The experience must have been obtained in the last 3 years on a continuous basis,
- at least 3 projects must be delivered (or completed) in the area of modelling and analysis of energy–macroeconomy linkages, particularly in relation to economy-wide energy technological innovation, energy finance and the monetary economy with direct EU energy and climate policy relevance, in the last 3 years, with a minimum value for each project of 100 000 EUR,
- the tenderer must prove experience of working in English with at least 3 projects delivered (or completed) in the last 3 years,
- the tenderer must prove capacity to draft timely reports in English. The tenderer must also have experience, gained in the last 3 years, in successfully marketing and innovatively communicating their analysis and reports, including the proven ability to convey messages to a wide-ranging audience,
- the tenderer must prove experience of having had projects, within the last 3 years, covering world economies and/or regions that are major international GHG emitters and/or EU trading partners, including experience with projects covering the EU as a region and individual EU Member States (at least those more economically powerful), with at least 2 projects delivered (or completed) in the last 3 years,
- the tenderer must prove experience, gained in the last 3 years, in data collection, statistical analyses, various energy-climate-economy-finance modelling and other related methodological approaches, and drafting reports and recommendations.

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 5 years of experience in project management, including overseeing project delivery, quality control of the delivered service, client orientation and conflict resolution experience in a project of a similar size and scope (being at least in one of the fields covered by this call for tender) with experience in management of a team of at least 10 people;

at least 5 experts whose combined expertise is at least 25 years and covers the fields of international energy and climate policies (with an emphasis on EU), macroeconomics, low-carbon innovation and energy technologies, and interactions between the monetary economy and the real economy. Each expert shall demonstrate a relevant higher education degree and/or 5 years of professional experience in at least one of the abovementioned fields;

at least 3 experts in the macroeconomic modelling of energy and climate policies related to the topics stipulated in Section 3 of the technical specifications. Each expert shall demonstrate a relevant higher education degree and/or 5 years of professional experience in the relevant field;

at least 3 experts with combined expertise of adopting different methodological approaches to evaluating policy aspects of the energy-(macro)economy-innovation-finance nexus (can be both quantitative and qualitative). Each expert shall demonstrate a relevant higher education degree and/or 5 years of professional experience in the relevant field;

at least 2 experts in database management and data collection. The experts shall demonstrate a relevant higher education degree and/or 5 years of professional experience in the relevant field;

language quality check: at least 3 members of the team should be proficient in English, as guaranteed by a certificate or past relevant experience: this expertise/these profiles are the only ones that can be combined with those of the above 5 categories: in any case, the tenderers must clearly specify, which members of the team comply with the requirement.

c. Evidence:

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

— list of relevant services provided (or completed) in the past 3 years, with sums, dates and recipients, public or private. The most important services shall be accompanied by certificates of satisfactory execution, specifying that they have been carried out in a professional manner and have been fully completed,

— the educational and professional qualifications (CVs) of the persons who will provide the service for this tender including the management staff. Each CV provided should indicate the intended function in the delivery of the service.

III.2.4) **Information about reserved contracts**

III.3) **Conditions specific to services contracts**

III.3.1) **Information about a particular profession**

Execution of the service is reserved to a particular profession: no

III.3.2) **Staff responsible for the execution of the service**

Legal persons should indicate the names and professional qualifications of the staff responsible for the execution of the service: yes

Section IV: Procedure

IV.1) **Type of procedure**

IV.1.1) **Type of procedure**

Open

IV.1.2) **Limitations on the number of operators who will be invited to tender or to participate**

IV.1.3) **Reduction of the number of operators during the negotiation or dialogue**

IV.2) **Award criteria**

IV.2.1) **Award criteria**

The most economically advantageous tender in terms of the criteria stated in the specifications, in the invitation to tender or to negotiate or in the descriptive document

IV.2.2) **Information about electronic auction**

An electronic auction will be used: no

IV.3) **Administrative information**

IV.3.1) **File reference number attributed by the contracting authority:**

ENER/A4/2015-436.

IV.3.2) **Previous publication(s) concerning the same contract**

no

IV.3.3) Conditions for obtaining specifications and additional documents or descriptive document

Payable documents: no

IV.3.4) Time limit for receipt of tenders or requests to participate

22.6.2015 - 16:00

IV.3.5) Date of dispatch of invitations to tender or to participate to selected candidates

IV.3.6) Language(s) in which tenders or requests to participate may be drawn up

Any EU official language

IV.3.7) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 6 (from the date stated for receipt of tender)

IV.3.8) Conditions for opening of tenders

Date: 2.7.2015 - 10:30

Place:

Directorate-General for Energy, DM 24, room 07/50A, 1049 Brussels, BELGIUM.

Persons authorised to be present at the opening of tenders: yes

Additional information about authorised persons and opening procedure: Tenderers may attend the meeting but be represented by not more than 1 person. At the end of the opening session, the Chairman of the opening committee will indicate the name of the tenderers and the decision concerning the admissibility of each offer received. The prices mentioned in the bids will not be communicated.

Section VI: Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: no

VI.2) Information about European Union funds

The contract is related to a project and/or programme financed by European Union funds: yes

Reference to project(s) and/or programme(s): Energy challenge Horizon 2020.

Work programme 2014–2015.

VI.3) Additional information

Tender documents can be downloaded from <http://ec.europa.eu/energy/en/funding-and-contracts/calls-tender>

VI.4) Procedures for appeal

VI.4.1) Body responsible for appeal procedures

General Court of the Court of Justice of the European Union

boulevard Konrad Adenauer

2925 Luxembourg

LUXEMBOURG

E-mail: generalcourt.registry@curia.europa.eu

Telephone: +352 4303-1

Internet address: http://europa.eu/about-eu/institutions-bodies/court-justice/index_en.htm

Fax: +352 4303-2600

VI.4.2) Lodging of appeals

Precise information on deadline(s) for lodging appeals: Within 2 months of the plaintiff being notified or, failing this, of the date on which it became known to them.

VI.4.3) Service from which information about the lodging of appeals may be obtained

VI.5) Date of dispatch of this notice:

28.4.2015