



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR ENERGY

Directorate C - Renewables, Research and Innovation, Energy Efficiency

CALL FOR TENDERS
ENER/C3/2015-545

Study

**"Enabling the European Common Voluntary Certification
Scheme for non-residential buildings"**

TENDER SPECIFICATIONS

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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 Procurement¹ concluded within the WTO applies, the participation to the call for tender 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.

¹ See 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 3 shall be filled in and signed** by:
 - The tenderer (including any member of a consortium or grouping)
 - subcontractor(s) whose share of the work represent more than 20% of the contract
- In order to prove their legal capacity and their status, all tenderers (including any member of a consortium of grouping) must provide a **signed Legal Entity Form with its supporting evidence**. The form is available at:
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 at: 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 4), duly signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in the Annex 4.

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

The successful tenderer shall provide the documents mentioned as supporting evidence in Annex 4 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 tender.

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 300,000.00

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 and knowledge in the field of energy performance of buildings, energy performance certificates and standardisation (e.g. good knowledge of CEN-standards for energy performance and the application of these),
- The tenderer must prove knowledge and insight into energy efficiency policy and policy on energy performance in buildings in particular, both EU and Member State level.
- The tenderer must prove experience from relevant work (e.g. designing other environmental voluntary schemes or other certification schemes) in Europe, with at least 1 project delivered (completed) in this field in the last five years with a minimum value of EUR 150,000.00.
- The tenderer must prove experience from working with organisational design, including website development.
- The tenderer must prove the ability to work in English (fluent level) and prove experience and capacity to draft and deliver reports in English.

b. Criteria relating to the team delivering the service:

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

One Project Manager: with at least 10 years of overall experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in a project of a similar size (at least EUR 200,000.00) and coverage (EU-wide), with experience in managing a team of at least 20 people.

A team of experts combining expertise in the field of building certification and energy performance of buildings (building stock, energy performance and certification and financing), organisational design (including related website development), data analysis and communication: all team members shall have the relevant higher education degree (Master of Science in the field of building engineering, physics, economics, organisational design or equivalent) and at least one of the team members should show at least 3 years of professional experience in the field of energy performance of buildings. At least two persons in the team of experts shall have a fluent level of English (as guaranteed by a certificate or past relevant experience).

Evidence:

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

- **List of relevant services** delivered (completed) 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.

N°	Award Criteria	Weighting (pts.)
1	<p><u>Methodology of work</u> Fulfilment of the needs, the objective and the scope of the tender specifications.</p> <p>This criteria will assess the clarity, understanding, completeness and full coverage of the tasks described in the tender specifications, the quality and appropriateness of the proposed detailed approach for data collection for each EU Member State as well as the quality and appropriateness of the proposed approach for methodology and for validating, analysing and presenting information. On-site data collection should be considered as much as possible and will be considered of higher value for the scoring.</p>	60

2	<p><u>Management and organisation</u></p> <p>This criterion will assess how the roles and responsibilities of the proposed team and of the economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time, timeline and resources and the rationale behind the choice of this allocation.</p>	30
3	<p><u>Quality control measures</u></p> <p>This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the objectivity of the technical assessment, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system should be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a lower score.</p>	10
Total number of points		100

Tenders must score at least 60% for each criterion, and at least 70% in total. Tenders that do not reach these minimum quality thresholds will be rejected and will not be further 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.

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

2.5. Technical offer

The technical offer must cover all aspects and tasks required in the technical specifications 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, translations or any other costs deriving from the execution of the contract. Travel and subsistence expenses are not refundable separately.

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. No maximum budget indication can be provided.

3. TECHNICAL SPECIFICATIONS

3.1. Introduction and objectives of the study

3.1.1. Introduction

Buildings are responsible for 40% of energy consumption and 36% of CO₂ emissions in the European Union. Energy performance of buildings is key to achieve the EU's Climate & Energy objectives, namely a 20% reduction of greenhouse gas emissions by 2020, 20% energy savings by 2020 and a 20% share of renewables.

The Energy Performance of Buildings Directive¹ (hereafter referred to as 'the EPBD' or 'the Directive') is the main legislative instrument at EU level to achieve energy performance in buildings. Under this Directive, the Member States (hereafter referred to as 'MS') must apply minimum requirements as regards to the energy performance of new and existing buildings, ensure the certification of their energy performance and require the regular inspection of heating and air conditioning systems in buildings. The Directive also requires Member States to ensure that, from the end of the decade, all new buildings will be 'nearly zero-energy' buildings.

With the recast of the Energy Performance of Buildings Directive² in 2010 (hereafter referred to as 'the recast EPBD'), the scope of the requirements has been extended, in particular by ensuring that the Energy Performance Certificate (hereafter referred to as 'the EPC') is included in all advertisements for sales or renting and by requiring all existing buildings when they undergo a major renovation to meet certain efficiency levels and not only those above 1000m² as was the case for the previous Directive.

Moreover, the Directive (in article 11(9)) requires the Commission to adopt, in consultation with the relevant sectors, a voluntary common European Union certification scheme for the energy performance of non-residential buildings.

Directive 2010/31/EU, Article 11 (9):

'The Commission shall, by 2011, in consultation with the relevant sectors, adopt a voluntary common European Union certification scheme for the energy performance of non-residential buildings. That measure shall be adopted in accordance with the advisory procedure referred to in Article 26(2). Member States are encouraged to recognise or use the scheme, or use part thereof by adapting it to national circumstances.'

In this context, such a 'voluntary' scheme for the non-residential sector should be developed in addition to the already existing mandatory national energy performance certificates under Article 7 of Directive 2002/91/EC and Articles 11, 12 and 13 of Directive 2010/31/EU.

Recital (31) of Directive 2010/31/EU says furthermore that: *'(...) uniform conditions for a voluntary common certification should be established in order to enhance the transparency of energy performance in the Union's non-residential property market (...).'*

3.1.2. Background and available information

As a follow up to the requirements of the EPBD Article 11(9), in March 2011 the Commission presented three broad options (A. EU 'Energy Performance Certificate' for non-residential buildings; B. EU 'Brand Label' for best-performing non-residential buildings; C. EU 'Eco-label' for best-performing non-residential buildings) to Member State representatives in a Energy Performance of Buildings Committee meeting. Most representatives saw option B, an EU 'Brand label' for best-performing buildings as the most realistic. There was consensus among MS in relation to the inclusion of public buildings in the definition of the 'non-residential' category, as per the definition in Annex I of the recast EPBD. After the meeting, DG Energy appointed external consultants to develop a proposal for a scheme that would classify buildings on the basis of national methods that would have to be subject to a quality check before switching to a common EU calculation method, once the CEN standards would be ready in 2015.

In a second discussion on Article 11(9) during a Committee meeting in January 2012, the Commission supported by a consultant presented a draft proposal for the overall management, the content of the certificate, the calculation method and the rating scale. Taking into account that no common European wide calculation method was available, the scheme would use national calculation methods for an "interim stage", shifting to common criteria once the new set of CEN standards are ready in 2015. Appreciating the overall approach of the Commission's draft proposal for a voluntary common EU certification scheme for non-residential buildings, several Member States raised concerns regarding the absence of a common calculation method to underpin the voluntary certification scheme. It was agreed that the approach of adopting an "interim scheme" and shifting to common criteria when the CEN standards are ready, would create confusion and could lower the reputation of the scheme.

A meeting with stakeholders of the relevant sectors (real estate, hotels, banks, etc.), also held in January 2012, brought similar conclusions. Most participants stated they would prefer to wait for a high quality common European Union calculation method based on the new set of CEN standards rather than to risk a false start on the market that would be difficult to reverse.

Having analysed the situation with the help of external expertise, and on the basis of consultation both with stakeholders and with Member States, it was decided to spend the necessary time and effort to develop a suitable scheme. On the basis of this it was decided to use a two-step approach with two contracts:

- 1st step: A detailed market analysis/study carried out in 2013 and 2014 (see link below) to define what the market needs are and what the scheme will be used for (given the fact that the scheme should finally be driven by the market). The conclusions and recommendations from this study are included in Annex I to these Tender Specifications;
- 2nd step: The technical development of the European Voluntary Scheme (EVS) – (**current tender**).

The following projects could be taken into account when designing the scheme:

- The market study for a common European Union certification scheme for non-residential buildings

<http://ec.europa.eu/energy/sites/ener/files/documents/Final%20report%20-%20Building%20Certification%20Schemes%20-%20FINAL%2026112014.pdf>

- The EEFIG report "Energy efficiency – the first fuel for the EU economy", which highlights the importance of EPCs and more generally of building certification for investments in energy efficiency (seen from a financial point of view). <https://ec.europa.eu/energy/sites/ener/files/documents/Final%20Report%20EEFIG%20v%209.1%2024022015%20clean%20FINAL%20sent.pdf>

- The BPIE study 'Energy Performance Certificates across the EU' (http://bpie.eu/epc_2014.html) evaluates, across the Member States, the implementation status of EU legislation regarding EPCs, particularly focusing on their quality, availability and usability. It also tackles the challenges related to EPCs, and provides for some best practices and policy recommendations.

- The results of a parallel study (ENER/C3/2014-544) undertaken by DG Energy on the subject of the Energy Performance Certificates and their impact, where relevant.

DG Energy organised a stakeholder meeting on 12 November 2014. The summary record of this meeting is included in Annex II to these technical specifications.

3.1.3. Objective and purpose of the Service contract

The EPBD recast requires the Commission to develop a voluntary common European Union certification scheme for the energy performance of non-residential buildings (EVS), in consultation with the relevant sectors. The EVS will be based on CEN-standards for calculating the energy performance of buildings (default values) and is not only fundamental to allow for owners and managers to compare buildings energy use, but also important for potential investors and tenants. Property owners in the non-residential sector are often large multinational property investment and development companies demanding international and European standardisation and improvement of buildings certification to allow benchmarking, development of a clear business case and energy savings measurement, as well as verification and reporting protocols. Furthermore the EEFIG (Energy Efficiency Financial Institutions Group) report acknowledged the usefulness of EPCs for creating a single market for buildings energy efficiency investments, but also the need for ensuring coherence, reliability, ease of access and accuracy of the certification process.

In accordance with Article 11(9) of the EPBD recast, the Commission is in the process of establishing this voluntary common European Union certification scheme for the energy performance of non-residential buildings (called thereafter "EVS"). The detailed market analysis/study already conducted defined what the market needs are and what the scheme will (and potentially can) be used for, given the fact that the finalized scheme should be driven by the market. The aim of this (second) contract is to get advice on the technical development and the operational requirements of the EVS, including how the CEN-standards on energy performance of buildings that are under development should be used in the scheme.

3.2. Description of services

The overall task of this contract is to fully develop the EVS to be operational, including the work of the technical specifications, management and operational aspects, e.g. how the EVS should be monitored, the verification and compliance aspects and market surveillance should

be described in detail. The scheme should be designed as an energy module that can be voluntarily taken up:

- by existing scheme providers like BREAM, LEED, DGNB, Passivhaus, HQE, Minergie or other providers as a component of a broader environmental certification scheme or as a stand-alone energy performance certification,
- by the Member States, when deciding to make the EVS become the national mandatory scheme for their non-residential sector. It should therefore fulfil the minimum obligations of the EPBD in respect to the national EPC schemes.

The system should be designed to achieve the highest possible market-uptake of the scheme among non-residential buildings in the EU. The scheme should be based on the outcome of the market study already done. It will be necessary to consult relevant stakeholders and the Commission during the process. The design of the EVS should include, but not be limited to:

- The technical and operational specifications (including platform, software and database) for the energy module that can be taken up by different providers of building certificates for non-residential buildings. This needs to be done in cooperation with the stakeholders, taking into account the CEN standards and the requirements of the EPBD;
- The qualification/certification scheme of experts;
- The plan for how the scheme will be organised (including the relationship to the Commission), monitoring, quality control, verification, market surveillance and compliance;
- The plan for how the scheme will be rolled out including an experimental certification of actual non-residential buildings to validate the EVS (pilot phase) and the full roll-out.
- The label (design, display and how to adapt it over time as requirements might change).

To meet these ends, the contractor is requested to identify best practice from existing certification schemes (e.g. from the environmental or agricultural sectors)

Task 1: Overall approach and technical design of the EVS including labelling and software

Based on the above mentioned framework described in the offer, the Contractor shall detail the approach and identify what is needed to enable the roll out of the EVS across the Member States. The operational aspects of the EVS should be designed fully respecting the requirements of the EPBD (recast) and the set of EPB CEN standards developed under Mandate M/480 and be based upon the experience from the testing of example cases (Contract ENER/C3/2013-484/01/FV2015-494). The EVS shall be applicable to all non-residential buildings, new and existing, public and private.

The scheme should be designed to enable integration with other, existing or new, sustainable certification schemes or as a stand-alone energy module. The EVS shall also ensure transparency for energy performance which is currently the most important and quantifiable sustainable parameter, when it comes to property value and return on investment. This would include the disclosure of energy use in the building in addition to the indicators for energy

performance as laid-out in the CEN-standards. The inclusion of other indicators related to buildings may also be decided by the Commission services (e.g. CO₂-emissions, environmental aspects or health related).

The overall approach should also include the establishment of contact with stakeholders (Member States, scheme providers, financial institutions and others).

The EVS should be a system that provides for comparability of ambition level for the energy performance of buildings across Europe (e.g. not adapted to different climate zones). Local climate conditions needed to perform the calculations are currently developed by the Joint Research Centre (JRC). The contractor should consider developing other national parameters, such as differentiated threshold for energy classes, to achieve the general aim of comparability.

In addition, all drafting of documents with legal implications concerning the scheme must be done in cooperation with the Commission services and subject to approval.

The Contractor should address potential confidentiality issues in its methodology and how to potentially approach issues of confidentiality e.g. when it comes to disclosure of data.

The Contractor will need to study and draw on the experience from existing European voluntary schemes/certification scheme, using methods of best practice (e.g. from the energy sector or other sectors, e.g. agriculture).

The contractor shall design the technical specifications of the EVS, e.g. develop the energy module that can be used as a stand-alone certificate or taken up as an energy module by existing voluntary environmental schemes. The need for a platform/software for doing this needs to be defined. Also the need for an underlying database and possibly other suitable technical solutions needs to be defined. The database should be easily accessible and compatible for existing EPC databases (if possible).

An attractive, recognizable label that gives visibility to the EVS needs to be designed. This label should be of mandatory use and clearly visible even when the certification of the energy performance is embedded in a broader environmental certification scheme. How the energy label will develop over time yet still ensure comparability should be analysed (e.g. "gold label year x" or other suitable labelling).

Task 2: Operational and organisational design of the scheme

The operational and organisational design of the scheme should look at how the scheme can be run, how it will be monitored, the verification, market surveillance and compliance. Different approaches could be studied for the calculation software tool(s) which should be fully in line with the EPBD set of standards. One possible route is to embed a software tool in a web portal, open to all qualified/certified experts. Another possible route would be to leave the software tool development and marketing to the market, which means that a certification procedure for these softwares should be developed. A consultation forum with the sector (cf. Task 3) should be organised by the contractor with the view to make a decision in that respect.

Article 17 and 18 in the EPBD requires the Member States to ensure that the energy performance certification of buildings are carried out in an independent manner by qualified and/or accredited experts and to establish independent control systems for energy

performance certificates. The contractor should advise on the appropriate link between the EVS and the national schemes when it comes to the non-residential buildings. In any case a proper market surveillance should be designed to ensure the reliability of the EVS.

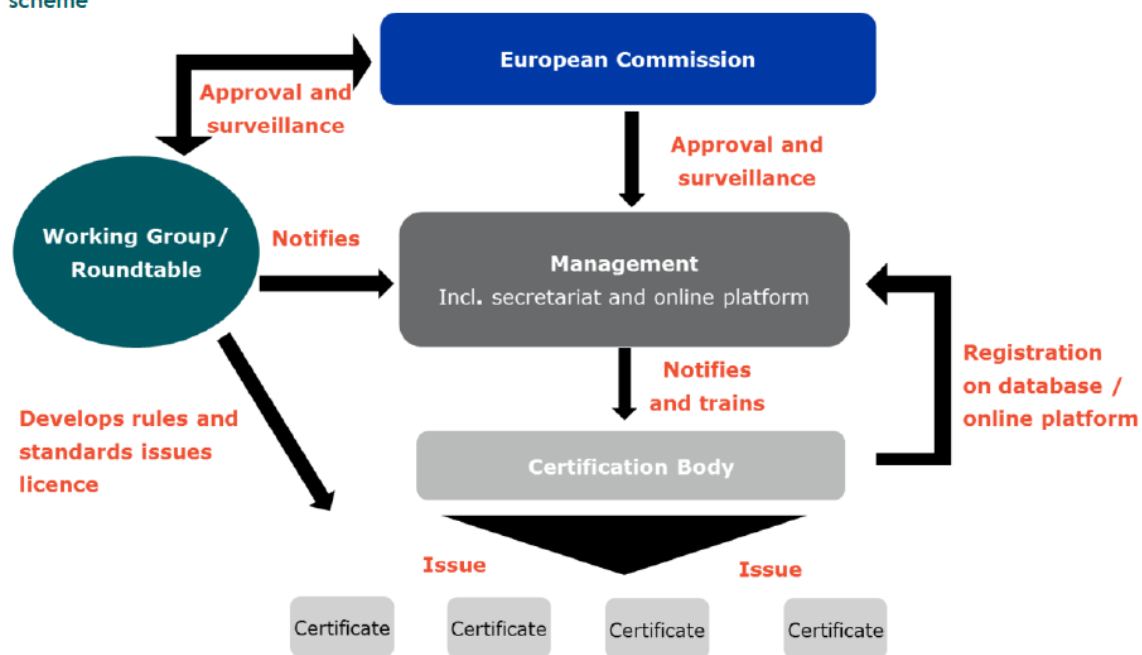
Where needed, links between the national schemes, software, platform and verification and market surveillance also need to be described. Also the links to the users of the software and platforms need to be described.

A common, suitable training module for independent experts needs to be developed.

A description of the overall responsibility of the scheme needs to be suggested. It is not foreseen that the Commission will run the scheme, only "own" it after it has been developed and rolled-out. How this ownership should be managed needs to be described and the legal instruments to make that happen studied in details. The Commission services will approve the final proposal.

The Contractor shall identify any gaps needed to roll out the EVS to fully explain the data collected and shall build an action plan to fill these gaps during Task 3.

Figure 8-5 Schematic overview for a possible operational structure of a voluntary common EU certification scheme



Draft operational structure for the EVS as suggested in the report "Market study for a voluntary common European Union certification scheme for the energy performance of non-residential buildings"

The Contractor shall also provide a strategy for the use of data that will be available in the database. This should include what type of data is available, who can use it (e.g. what is accessible to the public and what is accessible only to the Commission or the part that has the delegated responsibility) and what should the data be used for (looking at changes over time, development in the energy performance of the portfolio, possible links between recommendations and finance etc).

Task 3 (parallel): Consult with stakeholders.

Consult with stakeholders (Member States, the building industry, the finance sector, scheme providers, software companies, etc.) on the EVS. A minimum of two workshops should be organised by the Contractor and the involvement of stakeholders groups in appropriate setting should be ensured when relevant. The workshop should be organised in November and April (both tentatively). The contractor will be responsible for drafting the minutes and provide a short report of the overall consultation with the stakeholder.

Task 4: Final results including the detailed future timeline.

The Contractor shall develop a clear report that will consist of a complete package to enable to have a system quickly up and running once the parallel legal process has been finalised. The package shall include a pilot phase. This package shall furthermore cover all the aspects described in task 1-4. The report shall enable the practical establishment of the EVS and shall be accompanied by an operational manual for the roll out of the EVS and a test website to function as a platform for the EVS. A handover manual of the EVS should also follow. The full roll out of the scheme including the pilot phase should be among the items to be included.

3.3. Reports and documents to produce – timetable to observe

Execution of the tasks begins on 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.

3.3.1. Meetings

A **kick-off meeting** will take place in Brussels, at the latest **10 working days** following the entry into force of the contract, in order to settle all the details of the scheme, reports, etc., to be undertaken.

The Commission or the Contractor can initiate up to 2 intermediate meetings that will take place in Brussels between the kick-off meeting and the final meeting.

A **final meeting** will take place in Brussels, at the latest **2 weeks** after delivery of the draft final study and accompanying deliverables in order to discuss the Commission's observations on them.

3.3.2. Deliverables, including reports, work package and work shops

The Contractor will draft the minutes of all meetings performed within this contract. Draft minutes shall be sent to the Commission at the latest **5 days** after the meeting.

The Contractor will organise Workshop N. 1 with stakeholders in Brussels at the latest **2 months** after the entry into force of the contract (ideally before December 2015).

The Contractor will submit the draft **inception report** at the latest **3 months** following the kick-off meeting including the methodology, complete list of what is required to set up the scheme and the timeline for both the scheme and the roll out (task 0 and 1). The inception report should reflect contributions from the workshop. The Commission can make comments to the report within 15 days of reception. The final version of the inception report, to be approved by the Commission, has to be submitted at the latest **4 months** following the kick-off meeting.

The Contractor will submit the **draft interim report** at the latest **6 months** following the kick-off meeting including the gross matrixes at national and EU level (task 2).The Commission can make comments to the report within 15 days of reception. The interim report, incorporating the comments of the Commission, will be approved by the Commission and presented by the Contractor in Workshop N. 2, to be organised at the latest **7 months** after the entry into force of the contract.

Immediately after Workshop N. 2 the contractor will submit an invoice for the interim payment together with the final version of the intermin report .

The Contractor will submit a **draft study and accompanying deliverables** to the Commission at the latest **9 months** after the entry into force of the contract.

The draft study and accompanying deliverables will contain:

- 15-20 pages presenting the technical design of the EVS, timeline, organisational design and advise. It should in addition include a manual with a step-by-step approach on the effective roll out of the scheme. The report should include any risk factors for the roll out as identified through the design phase including in the meetings with the stakeholders/workshop.This report shall include a 2-3 pages executive summary;
- The platform for the scheme including a pilot website should be delivered and ready for testing.

A **final meeting** will take place in Brussels, at the latest **2 weeks** after delivery of the draft study and accompanying deliverables in order to discuss the Commission’s observations in the document.

The Contractor will update the draft study and accompanying deliverables taking into account the Commission's observations and submit their final version at the latest **12 months** after the entry into force of the contract.

The study will be sent together with:

- A 10-15 slides presentation with detailed comments/notes, to further communicate how the EVS will work in practice.
- 1 slide of facts and figures on the overall scheme

3.4. Indicative table

Kick off meeting	10 working days afer entry into force at the latest
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Workshop N.1 (with stakeholders)	2 months after entry into force at the latest
Draft inception report	3 months after kick-off meeting at the latest
Final inception report	4 months after kick-off meeting at the latest
Draft interim report	6 months after kick-off meeting at the latest
Workshop N.2 (with stakeholders) and final interim report	7 months after entry into force at the latest
Interim payment of 40% of contract price	After approval of interim report and Workshop N.2
Draft study and accompanying deliverables	9 months after entry into force at the latest
Final meeting	2 weeks after submission of draft final study and accompanying deliverables at the latest
Final study and accompanying deliverables	12 months after entry into force of the contract at the latest
Final payment	In accordance with Article I.4.2 of the contract

3.5. Study and accompanying deliverables format and publication

3 copies of the study and accompanying deliverables shall be supplied in paper form and one copy in electronic form in MS Office format (Word, Excel and PowerPoint).

The Commission may publish the results presented in the study and accompanying deliverables. For this purpose, the tenderer must ensure that the report is not subject to any restrictions deriving from intellectual property rights of third parties. Should the Contractor intend to use data in the study and deliverables, which cannot be published, this must be explicitly mentioned in the offer.

The reports and the study with their annexes and the deliverables have to be drafted in English in a properly literate manner and must be fully comprehensive in terms of grammatical structure (complete sentences, punctuation, explanation of abbreviations the first time they are used, etc.) using clear language.

In addition the the platform for the EVS should be delivered to the Commission to be ready to use for the Comission electronically.

3.6. Duration of the tasks

The duration of the tasks shall not exceed **12 months**. This period is calculated in calendar days.

3.7. 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 the 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 logo².

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

Pdf versions of studies destined for online publication should respect W3C guidelines for accessible pdf documents. See: <http://www.w3.org/WAI/>

5. ANNEXES

1. Executive summary and recommendations from the market study
2. Minutes from the expert meeting in Brussels 12 November 2014
3. Tenderer's Identification Form
4. Declaration related to the exclusion criteria and absence of conflict of interest
5. Power of Attorney (mandate in case of joint tender)
6. Draft Contract

² 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

ANNEX 1

Recommendations from the executive summary of the "Market study for a voluntary common European Union certification scheme for the energy performance of non-residential buildings"

✓ **Recommendations for further development and implementation of the scheme**

The study also presents a suggested scope and positioning for the voluntary common EU scheme. This takes stakeholder support and concerns into account in order to suggest solutions that will lead to a successful scheme. The legal basis of the proposed scheme, Directive 2010/31/EU (recast-EPBD) Article 11 (9), requires the Commission to adopt, in consultation with the relevant sectors, a voluntary common European Union certification scheme for the energy performance of non-residential buildings. The important points from this text are:

- The scheme is only intended to cover energy – there is no mention of wider sustainability issues.
- The scheme is intended to be voluntary – to be used in addition to the mandatory EPCs or taken up by Member States on a voluntary basis. The Directive encourages Member States to recognise or use the scheme (or parts of it) by adapting it to national circumstances.
- The main focus of the scheme is the non-residential property market, where voluntary sustainability certification (including an energy component) is already widespread.
- The aim of the voluntary common EU scheme would be to enhance the transparency of energy performance in the non-residential buildings market on the basis of uniform conditions across the EU (see recital 31 of the EPBD).

To achieve a system that best matches the intervention logic and market needs and demands we suggest the following:

- ✓ **Consider a pilot phase for initial launch focusing on a sub-sector of the non-residential building stock (e.g. offices, hotels)** – this approach makes it simple and MS comparable. After some time, it could be expanded to cover other building types in the future (if demand exists, or others want to adopt the approach).
- ✓ **Cover the public and private sector** – to maximise potential uptake and to allow public sector to ‘lead by example’.
- ✓ **One single version to cover both new and existing buildings** – to create uniform and transparent conditions for the non-residential property market. The underlying benchmarks and methodology should be adapted accordingly.

- ✓ **Start with a module for energy only** – this avoids duplication of leading schemes but provides an option for scheme providers to use this as the “energy module” in their schemes. This would also be highly appreciated by multinational investors who have to deal with 28 non-comparable national schemes. If other schemes (including new sustainability schemes resulting from any future EU common approach to assess the environmental performance of buildings as suggested in the Commission Communication on resource efficiency opportunities in the building sector³) wish to use the benchmarks and methodology in their wider scope schemes this should be allowed and encouraged. It also allows the possibility of future expansion into other modules.
- ✓ **Needs to have energy in use and as designed** – make use of the CEN method for the ‘as designed’, and for a standardised ‘as constructed’ version; this meets the market need for benchmarking and the need in some MSs for an accepted mandatory EPC methodology. Mandatory disclosure of actual energy consumptions is in line with the EPBD-recast as mentioned above, with a possibility to generate a statistical benchmark, which could be used for communication purposes. The benchmarking of energy in use (i.e. taking into account correction factors and building type / use) requires in use benchmarks to be calculated/ collated, which could be achieved by inviting bids for scheme operation, including from existing benchmarking scheme operators. In use benchmarks appear key to offering added value in comparison to national mandatory EPCs and to achieving the objectives of the scheme, but could be challenging to develop. There may be a need to develop an operational rating methodology and benchmark in addition to the asset rating.
- ✓ **Low cost** – as compared to the currently available voluntary sustainability schemes, the default CEN options would provide data for energy assessment software tools more cheaply. Access to these tools would still need to imply some cost, in order to create a business case for e.g. software companies to develop such a tool, but it is expected to be less expensive than at present.
- ✓ **Centralised registration system and disclosure** – this should help increase uptake and create a new market for businesses and international investors while making the system more efficient. Experience at Member State level indicates that national or regional databases enable the implementation of control mechanisms which are necessary to strengthen the trust in the certificate and prevent fraud. Lastly, if the data can be made public it will also be useful for research purposes.
- ✓ **Comparative label design** – allows for comparison of energy efficient building stock and provides an incentive for scheme users/ building owners to improve

³ COM(2014)445

their performance beyond what is required. In other words, it gives visibility to the energy performance of buildings contributing to improving energy efficiency in the real estate sector.

✓ **Roadmap for the roll-out of the scheme**

A roadmap to roll-out the voluntary common EU scheme has been proposed, including the technical development and the organisation and running of the scheme. We foresee the technical development of the scheme being led by a consultant/ technical adviser. This would assist the European Commission in designing the operation of the scheme with an active role for CEN, and in consultation with private and public stakeholders. The establishment of a ‘working group/ round table’ is proposed as one of the options to plan and/or oversee the implementation of the scheme and to enable the continued involvement of stakeholders throughout the implementation process as well as to guarantee consistency with the existing CEN EPB methodology. This working group could follow the IEA type of working group or a more open structure could be used, with dedicated stakeholder meeting(s) similar to the consultation workshops held during the course of this project. We suggest that the Commission should oversee the number and type of stakeholders who will be part of the group. This will help ensure the quality and effective functioning of the group.

A key part of the technical development is the energy assessment method used in the voluntary common EU scheme. The updated CEN standards and the set of default CEN options developed in relation to the EPBD can be the basis for this scheme. It is proposed that the technical development cost of the voluntary common EU scheme would be borne by the EU.

We suggest looking for synergies between the voluntary common EU scheme, and existing schemes (national voluntary schemes, EU level voluntary schemes and possibly national mandatory EPC schemes). We also suggest working closely with Member States’ experts and coordinating with any process already in place at Member State level. The links to the issuing of existing sustainability schemes need to be further exploited. This will allow for quick implementation and uptake of the voluntary common EU scheme and will contribute to developing the market for energy services in the EU.

For the organisational roll- out of the voluntary common EU scheme we have developed a six step roadmap following the widely used policy cycle that divides developing a functioning policy or regulation into the necessary phases of *planning, implementation, monitoring* and *evaluation*. In order to set up an organisational structure for a certification scheme, several initial decisions need to be made, dealing with questions of ownership and management, the scheme management structure and the set up and organisation of the certification and labelling process.

Figure 1 presents the steps that need to be taken to set up the voluntary common EU certification scheme. Each step includes a recommendation for set up as well as a list of key tasks that are connected to the successful execution of the step.

ANNEX 2

Minutes of Meeting, 12 November 2014, Brussels

Meeting for Stakeholders/Experts on the "Voluntary common EU certification scheme for energy performance of non-residential buildings"

1) **Welcome and Introduction**

Mr Paul Hodson (Chair, DG ENER) welcomed the participants (see attached list of attendees) and presented the history of the European Voluntary Scheme (EVS) briefly, including the conclusion drawn with the stakeholders in a stakeholder meeting on 9 January 2012 that the development of the voluntary certification scheme needed to be aligned with the preparation of the CEN standards on a common EU calculation methodology for energy performance of buildings (due in 2015). DG ENER has used the time to conduct a market study which has developed recommendations for the implementation of the scheme. Now for the operational design of the scheme Terms of Reference (ToR) are under preparation and stakeholders were encouraged to send **input** to these before the end of the year.

2) **Expert presentations**

The market stud., TripleE, Koen Rademaekers (presentation attached) presented the market study that had looked at demand for the EVS and studied existing voluntary schemes. Reliability, cost and international acceptance are key factors for scheme selection. The main added value would be to allow for a consistent system for non-residential buildings across the EU, which could contribute to attracting investment into building efficiency. It was highlighted that there is a demand for the scheme among all groups of interviewed stakeholders (scheme users, scheme providers and financial institutions). The scheme should build on CEN standards, start with a pilot phase (e.g. with offices and hotels), take a modular approach focussing on energy performance only and be applicable both for public and private buildings and new as well as existing buildings. The EVS should use a comparative label design. It was recommended that a third party should be responsible for the technical development and roll out of the scheme.

Bettina Dorendorf, DG ENER, coordinator of the Energy Efficiency Financial Institutions Group (EEFIG), (presentation attached) presented how EEFIG, a working group of financial stakeholders, has studied how to attract energy efficiency investments and the link to Energy Performance Certificates (EPCs) and building certification. Standards were reported to be among the highest ranking drivers for such investments and need to be developed as a route to increase the confidence of financial institutions in these investments.

Frank Hovorka, Caisse des Dépôts, EEFIG member (presentation attached) presented the financial sector's point of view, focussing on the importance of having a robust certification scheme in order to be able to put value on the

building, and manage uncertainty which constitutes risk. Answering a question from EuroACE (Adrian Joyce), he specified that this calculation is important on building level, even when an institution has a portfolio of buildings (e.g. subprime case). Mr. Hovorka presented the translation from technical language to a financial language as key for investment, underlining again the importance of knowledge of risk.

Linn Johnsen, DG Energy responsible desk officer for the EVC (presentation attached) presented the Commission services' thinking on how to move forward with designing the scheme, building on the report that had been presented, the work of EEFIG and the embryonic CEN standard. It was underlined that the Commission would be the "owner" of the scheme, but would not run it itself, and that input for the ToR for the contract for the technical design and set up of the scheme would be appreciated from the stakeholders.

3) **Discussion**

The discussion with the experts/stakeholders that followed concentrated on the following topics

a) The use of measured energy vs energy performance as-designed.

The European Property Federation advocated the use of both as designed and as-measured energy performance. VERCO/UK Green Building Council stressed that if the EU certification scheme for non-residential buildings will use both as designed and as-measured energy, these would need to be displayed with an equal prominence on the certificate. There was broad agreement that both measured energy and energy as designed should be included in the scheme. The Netherlands and Sweden were pointed to as MS that already use both in their current EPC systems. EuroAce added that renovations of existing buildings will be key and here it is easier to measure the before/after difference. The Commission services said that they would look into how to integrate both concepts in a feasible way, noting that the voluntary scheme would be different in nature to the obligation for Member States to have national EPC systems in place.

b) Modular approach

The concept of supporting a modular was widely accepted. The Commission underlined that this should be robust and fully respect the requirements of the Energy Performance of Buildings Directive (recast).

c) Initial pilot phase

This idea received wide support. Some stakeholders suggested to start with offices before hotels and Germany pointed out the need to be careful with "the total surface area" criterion as some buildings have a significant area that is unused and still needs to be heated/cooled. For the label design, the European Property Federation pointed out that an "easy to understand" cover page was needed, as exemplified by LEED.

d) Competition challenges

ECEEE raised concern about competition by such a scheme with existing commercial schemes. The Commission services responded that the system would be voluntary also for scheme providers, and that it should have sufficient quality to be attractive for the scheme providers to "adopt" it. Portugal raised concern that the EVS could compete with national EPC schemes, the Commission services emphasised that it does not foresee one single European EPC scheme. Cyprus expressed that for small MSs with a limited market and scarce resources, a robust methodology developed under EVS could lead to a substantial improvement. Energy Cities remarked that they saw the competition with national scheme rather as an opportunity leading to better quality schemes.

The Commission services underlined the importance they attach to continuing to consult the stakeholders and experts in the process of designing and rolling out the scheme.

ANNEX 3

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)

Call for tender ENER/C3/2015-545

Identity	
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) ⁴	
Address	
Address of registered office of tenderer	
Where appropriate, administrative address of tenderer for the purposes of this invitation to tender	
Contact Person	
Surname: First name: Title (e.g. Dr, Mr, Ms) : Position (e.g. manager):	

⁴ For natural persons

Telephone number: Fax number: E-mail address:	
Legal Representatives	
Names and function of legal representatives and of other representatives of the tenderer who are authorised to sign contracts with third parties	
Declaration by an authorised representative of the organisation⁵ I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

⁵ This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.

ANNEX 4

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 control⁶ 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 penalties⁷ 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

⁶ This covers the company directors, members of the management or supervisory bodies, and cases where one natural person holds a majority of shares.

⁷ 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 5

POWER OF ATTORNEY

mandating one of the partners in a joint tender as lead partner and lead contractor ⁸

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:

⁸ To be filled in and signed by each of the partners in a joint tender, except the lead partner;

ANNEX 6

DRAFT CONTRACT

Please see separate document