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**Belgium-Brussels: 'Delivering informed investment decisions for energy efficiency investments through accessible data, standardised procedures and benchmarking of performance' also supporting the 'Smart finance for smart buildings initiative' 2015/S 111-200638**

**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  
rue Demot 24  
For the attention of: ENER/C3/2014-563  
1049 Brussels  
BELGIUM  
E-mail: [ener-tender-2014-563@ec.europa.eu](mailto:ener-tender-2014-563@ec.europa.eu)

**Internet address(es):**

General address of the contracting authority: <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**

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:**

'Delivering informed investment decisions for energy efficiency investments through accessible data, standardised procedures and benchmarking of performance' also supporting the 'Smart finance for smart buildings initiative'.

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 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.

NUTS code BE10

**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)**

This service contract forms an essential part of the 'Smart finance for smart buildings initiative' put forward in the Energy Union communication, through addressing key hurdles of 'investibility' of the energy efficiency market. It addresses the fundamentals of energy efficiency investments in buildings and corporate sectors.

The purpose of this tender is to develop and launch an EU-wide initiative to work out a common set of procedures and standards for corporate energy efficiency and building renovation underwriting for both debt and equity financing products.

Thus it focuses on creating an investible market framework by addressing the investment drivers for both the demand for financing and the supply of finance for energy efficiency investments and enabling conditions for the scale-up of existing instruments and schemes in the EU. It tackles the following challenges:

driving the demand for investments, drawing on the role of the legislative framework and following up on the analysis of the demand for and supply of financing in the EEFIG report;

managing uncertainty by making the energy efficiency market 'readable' and understandable for investors, property owners and corporates;

developing a methodology enabling the aggregation of investments and activating the appropriate distribution channels for financing (leading to the reduction of transaction costs and risk perception as well as preparing the basis for capital market-based refinancing of energy efficiency loan portfolios).

The financial institutions, investors and market players will gain access to a fully informed, standardised and mutually accepted evidence-based framework for the development and roll-out of tailored financing products for energy efficiency investments in buildings stock and corporates. The tender work will engage the market participants in an expert dialogue and joint development of standardised investment processes and protocols, enabling the proper assessment and valuation of underlying risks and benefits while reflecting the fundamentals related to energy cost reduction and additional available liquidity due to energy savings. If these fundamentals are confirmed, the initiative aims at providing a stronger impetus for aggregation of energy efficiency investments on a bigger scale leading to the significant flow of private capital. Finally, this tender should lead to the development of a voluntary agreement with financial institutions and investors, adhering to the agreed standards and principles, thus increasing the market confidence. As it can be expected that some of the current underlying bottlenecks can be effectively addressed by a regulatory framework, there is a strong causal connection with the EPBD review, which will run in parallel to this tender and to which this tender will contribute.

**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:**

Workload estimated at 800 man-days maximum.

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: 24 (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:**

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

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

Please see points 1.1, 1.3 and 1.4 of the tender specifications.

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: See tender specifications.

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

Information and formalities necessary for evaluating if the requirements are met: See tender specifications.

III.2.3) **Technical capacity**

Information and formalities necessary for evaluating if the requirements are met:  
See tender specifications.

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/C3/2014-563.

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

no

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

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

17.8.2015 - 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: 25.8.2015 - 11:00

Place:

Directorate-General for Energy, Unit C3, Office 04/101, rue Demot 24, 1049 Brussels, BELGIUM.

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

Additional information about authorised persons and opening procedure: 1 representative of each tenderer may attend the official opening.

**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): 2014–2015 work programme in the framework of the specific programme implementing Horizon 2020 — the framework programme for research and innovation (2014–2020).

VI.3) **Additional information**

Tender documents will be available for download at the address indicated under heading I.1. The website will be updated regularly and it is the tenderers' responsibility to check for updates and modifications during the tendering period.

VI.4) **Procedures for appeal**

VI.4.1) **Body responsible for appeal procedures**

General Court of the European Union

rue du Fort Niedergrünwald

2925 Luxembourg  
LUXEMBOURG  
E-mail: [generalcourt.registry@curia.europa.eu](mailto:generalcourt.registry@curia.europa.eu)  
Telephone: +352 4303-1  
Internet address: <http://curia.europa.eu>  
Fax: +352 4303-2100

VI.4.2) **Lodging of appeals**

Precise information on deadline(s) for lodging appeals: Within 2 months of the notification to the plaintiff, or, in absence thereof, of the day on which it came to the knowledge of the plaintiff. A complaint to the European Ombudsman does not have as an effect either to suspend this period or to open a new period for lodging appeals.

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

General Court of the European Union  
rue du Fort Niedergrünwald  
2925 Luxembourg  
LUXEMBOURG  
E-mail: [generalcourt.registry@curia.europa.eu](mailto:generalcourt.registry@curia.europa.eu)  
Telephone: +352 4303-1  
Internet address: <http://curia.europa.eu>  
Fax: +352 4303-2100

VI.5) **Date of dispatch of this notice:**

1.6.2015