



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR ENERGY

DIRECTORATE C - New and Renewable Sources of Energy, Energy Efficiency & Innovation
C.2 - Energy Technologies and Research Co-ordination

FREQUENTLY ASKED QUESTIONS

INVITATION TO TENDER NO. ENER C2/2010-513-1

"ENERGY RESEARCH KNOWLEDGE CENTRE"

CONTRACT NOTICE: JO S 1-000172

Last update: 17/02/2011

Question 1: On page 5 of the Tender Specifications it is mentioned that the priority of the ERKC shall be a complete presentation of the EU energy research programmes, such as FP7, etc. The FP7 programme started in 2007; is it the idea to gather the information from this period on?

Answer: For the FP7 programme, the information gathered shall cover the period from the start of the programme.

Question 2: What is the starting date for the other *EU energy research and demonstration* programmes - all from their start?

Answer: On page 11 of the Tender Specifications it is stated that *the data gathering and keeping them up-to-date shall include the data about all the current and planned EU programmes*, thus including all the ongoing EU energy research and demonstration programmes at the time of the signature of the contract with the selected tenderer - independently of their starting date - and including any new EU programmes planned to start after the signature of the contract with the selected tenderer. As stated on page 5 of the Tender Specifications, the EEPR and RFCS shall be presented.

Question 3: On page 5 of the Tender Specifications it is mentioned that one of the aims of this tender is to gather information on national and regional energy research programmes - what is the timeframe; i.e. from which year is the information to be gathered?

Answer: On page 11 of the Tender Specifications it is stated that *the data gathering and keeping them up-to-date shall include the data about all the current and planned*

Member States' programmes (including the data on relevant energy research projects funded by Member States' programmes and finished from 1 January 2008 onwards or still ongoing), thus including all the ongoing national and regional energy research and demonstration programmes at the time of the signature of the contract with the selected tenderer - independently of their starting date - and including any new national and regional programmes planned to start after the signature of the contract with the selected tenderer. On the level of the specific information relating to relevant energy research and demonstration projects funded under the Member States' programmes it shall be noted that only such projects finished from 1 January 2008 onwards or still ongoing shall be taken into account.

Question 4: Is involvement and/or participation in FP7 projects considered as possible conflict of interest for this tender?

Answer: Even if it seems that in general the situation of the conflict of interest should not arise because of the involvement or participation of the tenderer in FP7 projects, it is not possible to give any reliable theoretical answer. The possibility of the conflict of interest can only be evaluated with respect to a concrete situation, concrete project, concrete team, etc. The attention of the tenderers is brought to the Article II.3 of the Draft Service Contract and section IV.1.2 of the Tender Specifications.

Question 5: Is it possible to suggest amendments to the draft contract?

Answer: No. The attention of the tenderers is brought to the point 8 of the Invitation to Tender.

Question 6: Should the evidence regarding the exclusion criteria (i.e. the form attached in the Annex 4 of the Tender Specifications) and the evidence regarding the selection criteria (such as balance sheets, overall turnover, CVs, etc.) be included in the "Section One: Administrative Proposal" of the tender?

Answer: The Tender Specifications do not contain requirement as to where exactly such information should be placed. You may therefore include the evidence regarding the exclusion and the selection criteria in the administrative proposal or elsewhere in the tender.

Question 7: Is the External Support Network intended to cover all EU and FP7 Associated Countries?

Answer: On page 8 of the Tender Specifications it is stated that *an External Support Network, composed of relevant experts and stakeholders, can be set up by the selected tenderer*. There is no obligation to set up such network. However, in case of its establishment, its composition shall be defined by the tenderer and its tasks shall cover the geographical scope of the tender, thus the Member States (EU) as well as other countries (such as the Associated Countries to The Seventh Framework Programme). It is up to the tenderers (who intend to set up the External Support Network) to define such

network in more detail, in compliance with the Technical Specifications of the Tender Specifications.

Question 8: The tenderers are asked to present certain costs (such as the costs of the Thematic Research Summaries, the Policy Brochures, the transfer to SETIS and the event-related materials) separately as cost items. Are these costs (such as the costs of the man days relating to the preparation and production of the materials, costs of the printing itself, etc.) included in the estimated 3500 man days of work involved to carry out this contract?

Answer: According to the Tender Specifications (page 20, under the section III.2.3, second indent), *prices must be fixed amounts and include all expenses, such as travel expenses and daily allowances*. The Commission has made an estimate of the overall price of the tender and expressed it in "man days" equivalents, i.e. 3500 man days, which therefore present the total estimated costs of the tender (including the days of work, printing costs, costs of potential subcontracting and any other costs related to the execution of the tasks under the contract).

Question 9: Are the man days required for the production of the Policy Brochure supposed to be included in the general man-day breakdown or should they be presented in that particular cost item only? And how should the costs regarding the machine translations and the non-machine translations be presented?

Answer: Certain individual items of the budget and certain information regarding the human resources planning are to be presented separately for the purpose of the evaluation of tenders (page 27 of the Tender Specifications, concerning the award criteria 3). It is up to the tenderers to decide how exactly they would in their tenders include/present the man day breakdown and the costs in order for these to be in compliance with the Tender Specifications. On page 13 of the Tender Specifications it is stated that *all the costs related to the Thematic Research Summaries and the Policy Brochures shall be presented in the tenders*. On page 7 of the Tender Specifications it is stated that *translation costs shall be included in the tenders*. On page 10 of the Tender Specifications it is stated that *the tenderers shall propose in their tenders a cost-effective way of possible machine translations of the information published on the ERKC website into other official EU languages by making use of state-of-the-art technology, thus helping users across the EU in understanding of the published contents*. It shall also be noted that on page 8 of the Tender Specifications it is stated that *the tasks attributed to the subcontractor(s) shall be clearly identified and the total cost of all the tasks to be done by all subcontractors shall be presented separately in the tenders*. In addition, it shall be noted that on page 21 of the Tender Specifications it is stated that *for each category of staff involved in the project, the tenderer must specify the total labour costs, the daily rates and total number of days (man/days) each member of staff will contribute to the project, and other categories of costs, indicating the nature of the cost, the total amount, the unit price and the quantity*.

Question 10: Is there an estimate of the material that will be required to be translated and in which languages?

Answer: No.

Question 11: Is there a template for preparing the technical part of the tender?

Answer: No. The technical proposal shall be in compliance with the Tender Specifications.

Question 12: It is our understanding that the total cost of the project has been estimated by the contracting authority as 3500 man-days equivalent, which includes all costs (thus also the travel/accommodation costs associated with the one-day event to be held by the ERKC contractor). Therefore when the costs such as the costs of this event are to be presented separately in the Financial Proposal they will not be added to the 3500 man-day-cost equivalent but will rather form a part of it. Can you please confirm?

Answer: Please see the reply to the question number 8 above. It follows that any costs associated with the one-day event to be held by the ERKC contractor are also to be included in the overall amount of 3500 man-day equivalent. According to the Tender Specifications (page 13) *a major event of one day (with up to 200 targeted participants from the principal potential ERKC contributors and users, as proposed by the selected tenderer and based upon the approval of the EC), including its web streaming over the internet, must be organized by the selected tenderer during the duration of the contract and all of its costs are to be borne by the selected tenderer, thus presented in the tenders, including covering the travel costs for its participants.*

Question 13: Should the Financial Proposal be submitted together with the Technical Proposal in the same envelope or should we use the “double envelope” procedure, common in many EC-financed projects, which entails enclosing the Financial Proposal on a separate sealed envelope?

Answer: The attention of the tenderers is brought to the point 3 of the Invitation to Tender. It follows that all sections of the tender must be placed in the inner envelope, which can only be one.

Question 14: Should all the costs (*such as also the costs of printing the brochures, costs of production of promotional material, costs of potential licenses for software, the outsourced costs such as translation costs, costs related to the event organization - such as hiring of the rooms, hiring presentation material, engaging interpreters, the travel and accommodation costs of the participants, etc.*) be attributed in some way to the staff involved in the project or is the total cost for each type of expense acceptable?

Answer: On page 21 of the Tender Specifications it is stated that *for each category of staff involved in the project, the tenderer must specify the total labour costs, the daily rates and total number of days (man/days) each member of staff will contribute to the project, and other categories of costs, indicating the nature of the cost, the total amount, the unit price and the quantity.* It follows that costs such as of printing the brochures, of promotion material, translation costs, etc. are not to be attributed to the costs of staff but specified in the tender as to their nature, total amount, the unit price and the quantity. In addition, the attention of the tenderers is also drawn to the reply to the question number 9 above.

Question 15: On page 11 of the Tender Specifications it is stated that the award criterion "Project management and resources" relates to the appropriate overall project planning and management and the human and financial resources allocated to cope with and fulfil the obligations of the contract. Could you explain what is meant by the term "financial resources" within this particular criterion (*i.e. does this term refer to information presented in the Financial Proposal; is the Financial Proposal assessed under this criterion in addition to it being assessed in the calculation of the ratio quality/price*)?

Answer: The term "financial resources" within this particular criterion relates to the *financial resources allocated to cope with and fulfil the obligations of the contract*. The information regarding the allocation of the financial resources (*i.e. the budget*) shall allow the European Commission to evaluate how the tenderer's total price will be distributed among the various activities. The tenderer's total price will be part of the calculation of the ratio quality/price, based on which the contract will be awarded. The attention of tenderers is also drawn to the reply to the question number 9 above.

Question 16: Is it possible to provide an indication on how much of translation (in terms of volume or budget) is deemed satisfactory?

Answer: No. Please see also the replies to the questions number 9 and 10 above.

Question 17: The Tender Specifications state that a major one-day event must be organized (with up to 200 targeted participants). How many participants should the estimation of the costs include and should the entire cost of all participants (round trip to and from the venue of the event and accommodation) be covered by the project and included in the project budget?

Answer: Please see the reply to the question number 12 above. The selected tenderer is requested to organize such event with up to 200 participants.

Question 18: Does each partner need to have an income of 1,5 million EUR or do the partners jointly need to have such income?

Answer: On pages 25 and 26 of the Tender Specifications it is stated that *tenderers must provide evidence of their economic and financial capacity by submitting an annual turnover of minimum 1.500.000 EUR, for the past three years*. In case of joint offers, this turnover is required from the leader of the consortium.

Question 19: How often should the content of the portal be reviewed for quality assurance and how often a report about it should be prepared?

Answer: On page 8 of the Tender Specifications it is stated that *a system for quality control of all information provided on the ERKC section of the SETIS website should be proposed by the selected tenderer and that the tenders should include quantitative targets for monitoring the implementation of the contract, with schedule of submitting them to*

the EC. On page 10 of the Tender Specifications it is stated that the selected tenderer must maintain and update all sections of the website throughout the duration of the contract and that "News" updates should be made on a bi-weekly basis and that major updates linked to the results of projects should be made twice a year, according to the plan proposed by the selected tenderer and subject to its approval by the SETIS. It follows that it is up to the tenderers to address these issues in the tenders.

Question 20: Will the name of the portal be "ERKC" or should we create a new name?

Answer: It is not foreseen to change the current name "Energy Research Knowledge Centre", but the possibility of changing it a later stage shall remain open and may be discussed with the selected tenderer.

Question 21: Does the Commission have preference regarding the minimal frequency of sending the newsletters?

Answer: On page 14 of the Tender Specifications it is stated that *tenders should include proposals on the content and dissemination of the newsletters and press releases.* It follows that no minimal frequency is requested, but the tenderers are expected to address this issue in their proposals.

Question 22: How many events organized by the tenderer (apart from the main one) are accepted by the Commission as sufficient number?

Answer: There is no requirement regarding minimal or sufficient number of events to be organized by the tenderer (apart from one major event), but the tenderers are expected to address this issue in their proposals. This is necessary inter alia in order to evaluate the tenders in respect of the award criteria relating to *quality and appropriateness of proposed communication and dissemination activities.*

Question 23: In order to complete the Financial Proposal (as per page 21 of the Tender Specifications), can we, for specific tasks where some of the specific staff members (such as specialists speaking certain languages or policy analysts with particular expertise) cannot be fully identifiable at this stage, propose a pool of experts under the same category, to be appointed to implement the tasks relevant to that category once the exact content is known?

Answer: On page 8 of the Tender Specifications it is stated that *an External Support Network, composed of relevant experts and stakeholders, can be set up by the selected tenderer and that such network, in case of its establishment, shall also include the expertise needed in other areas and that its composition and the costs shall be presented in the tender, ideally including the CVs of its potential members.* It follows that the selected tenderer can at a later stage include in the External Support Network certain members with the expertise that can not be fully identifiable at this stage (thus possibly including some of tenderer's or subcontractor's members of staff), which, concerning their performance of certain specific expert tasks within the scope of the External Support Network, do not fall under the scope of the Financial Proposal's part relating to

the term “*member of staff*” (as stated on page 21 of the Tender Specifications). The Financial Proposal shall nevertheless present all the costs of the External Support Network in case of its establishment, thus the nature of the cost (possibly expressed as “the External Support Network”), the total amount, the unit price (possibly expressed as “average labour cost of work of a member of the External Support Network in his/her performance of tasks under the scope of the External Support Network”) and the quantity (possibly expressed as “number of members of the External Support Network”).

Question 24: On page 13 of the Tender Specifications, regarding the major event of one day, whom does the word “participants” refer to within the term “*including covering the travel costs for its participants*”?

Answer: The word “participants” within the term “*including covering the travel costs for its participants*” refers to all participants. Please see also the reply to the question number 12 above.

Question 25: Should only the company or person heading the project submit a copy of the document authorizing this company or person to submit a bid – or should the subcontractors do so as well?

Answer: On page 18 of the Tender Specifications it is stated that *groupings (or consortium) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a bid*. It follows that this request does not refer to the subcontractors. The abovementioned authorised company or person shall submit a tender on behalf of the grouping (or consortium) and shall in this tender include a copy of the document(s) authorising this authorised company or person to submit a bid.

Question 26: Must each subcontractor provide all the necessary documents for assessing the bid as a whole with regard to the exclusion criteria, selection criteria (in their entirety) and award criteria - or a single document for the whole grouping will be accepted?

Answer: On page 18 of the Tender Specifications it is stated that in case of the grouping (or consortium) *each member must provide all the necessary documents for assessing the bid as a whole with regard to the exclusion criteria, selection criteria (in their entirety) and award criteria*. It follows that each member of the grouping (or of the consortium) must provide for the common bid all the necessary documents relating to its own particular case. For economic and financial capacity, please see the answer number 18. For technical and professional capacity, see section IV.2.2 of the Tender Specifications (page 26). For exclusion criteria, see section IV.1.3 of the Tender Specifications (pages 24 and 25).

Question 27: Can you provide the Annexes of the Tender Specifications in MS Word format?

Answer: Documents in the Annex 2 (Financial Identification Form) and 3 (Legal Entity Form) are available on the web addresses indicated in the Tender Specifications. The European Commission does not provide the MS Word versions of remaining annexes.

Question 28: Is it acceptable to use Drupal with a MySQL database in the implementation?

Answer: Yes. However, the Oracle database is the currently used and preferred database engine for relational data. Should there be specific database application development needs, the use of Oracle is highly recommended. However, content management systems like Plone or Drupal often have an internal or easily integrated database which can be used as the content management platform. This is also the way SETIS currently uses Plone and its internal database along with an Oracle database for other needs. On page 9 of the Tender Specifications it is stated that should the tenderer propose for the ERKC any content management system other than the Plone 3 and Drupal, *all the costs incurred for licences and setup and any other related costs should be clearly presented and substantiated, forming a part of the tenderer's overall budget for this tender.*

Question 29: Can the latest version of Drupal be used in the implementation?

Answer: Yes. Drupal is used by the Commission, but currently not in SETIS. The latest version can be used.

Question 30: If the ERKC is implemented in a platform other than Plone 3 (such as Plone 4 or Drupal), will it be necessary to migrate the complete SETIS website to that platform?

Answer: No. SETIS and ERKC will be integrated, but developed separately.

Question 31: Could you provide a brief description of the current hardware architecture of SETIS? If the ERKC server requirements so require, can those infrastructures be expanded?

Answer: On page 9 of the Tender Specifications it is stated that *the ERKC portal shall be hosted on the SETIS's hardware, available to the selected tenderer free of charge, respecting SETIS's requirements and that a preliminary description of server requirements shall be provided in the tenders.* The current version of the SETIS website and related servers is implemented on an architecture consisting of a Windows application server (PHP, Flex, Java, Plone 3) and a Windows database server (Oracle10g). In addition to these the architecture contains specific servers for e.g. LDAP directory and single sign-on (Windows) and specific application needs (Linux). If this is necessary, possible expansion needs are evaluated and implemented.

Question 32: Are there traffic or load statistics available for the SETIS website?

Answer: According to awstats logging, the approximate monthly usage of the current SETIS website is the following: 4500 unique visitors, 7000 visits, 650000 hits for files and 8.87 GB of bandwidth used.

Question 33: Should the preliminary description of the server requirements (as stated on page 9 of the Tender Specifications) include network requirements?

Answer: Network considerations are not needed in the tender. SETIS and the future ERKC use the European Commission's network infrastructure, which includes firewalls and other means of network security.

Question 34: Is any one of the proposed content management systems (Plone 3 and Drupal) preferred over the other?

Answer: No. The attention of the tenderers is also drawn to the replies to the questions from number 28 till 31 above.

Question 35: Would it be possible to propose other database engines than Oracle?

Answer: Yes. Please see also the reply to the question number 28 above.

Question 36: Can the training and information sessions envisaged during the last 6 months of the contract be given to the SETIS staff at the Institute for Energy in Petten, Netherlands - and how many people are expected to attend the training sessions?

Answer: The trainings can be held in the premises of the Institute for Energy in Petten, Netherlands. The number of staff receiving the training will not exceed 30.

Question 37: What kind of "appropriate reporting tools" shall be developed for presenting the results of the energy research projects and clusters of project (as per page 9 of the Tender Specifications)?

Answer: The reporting tools to be developed by the selected tenderer (such as reporting templates and on-line information technology tools) may be inspired from the BIOMAP (see <http://setis.ec.europa.eu/BIOMAP>) or equivalent website and ensure that the results of the energy research projects and clusters of project are presented in a clearly structured and user friendly manner.

Question 38: Concerning an External Support Network (the answer to the question 23 above), we have the relevant capacity inside the consortium, so our question concerns only the experts from our own consortium staff (thus not an External Support Network). Can we assume that your answer for External Support Network is also applicable to the consortium members? In other words: the nature of the cost (pool of experts identified for the implementation of task to be decided at the implementation phase), the total amount, the unit price (possibly expressed as "average labor cost for the pool of experts

proposed”) and the quantity (possibly expressed as “number of days necessary to implement the task by the pool of proposed experts”).

Answer: Yes, this approach is possible.

Question 39: Should the tenders include the methodology or sample questionnaire or even already at this stage carry out an actual survey regarding the ranking of the ERKC websites?

Answer: On pages 10 and 11 of the Tender Specifications it is stated that *the ERKC website is expected to rank among the top five websites listed by the major search engines when searching for "energy research" and at least two other word combinations (of two or more words) that are most commonly used by policy makers (at the EU and national levels) and research, industry and academic communities within the EU while searching for the energy research related information and that these word combinations shall be identified by the selected tenderer, based on the survey carried out by the selected tenderer among the principal potential users of the content published on the ERKC and that tenderers shall include such survey in their tenders.* It follows that tenderers shall in their tenders present such survey (possibly through the proposed methodology or sample questionnaire), including all of its costs, but the actual survey shall be carried out by the selected tenderer after the contract signature.

Question 40: In order to clearly define the amount of work required to develop a visual identity of ERKC, is there any additional information (such as further features and requirements) available?

Answer: No. On page 13 of the Tender Specifications it is stated that *visual identity of the ERKC will be produced by the selected tenderer in cooperation with SETIS and subject to its approval by SETIS, in order for the ERKC to have a consistent public image, clearly linked to the visual identity of the EC and SETIS in particular and that the design of the ERKC website must follow the relevant EC's guidelines (which will be provided to the selected tenderer after the contract signature), which make it possible to be integrated into the EC's websites and SETIS in particular.*

Question 41: What is the objective of the major event of one day (with up to 200 targeted participants), i.e. launching the ERKC or at some later stage discussing particular outputs or themes?

Answer: On page 13 of the Tender Specifications it is stated that *in order to promote and raise awareness about the ERKC among the target groups, sufficient resources need to be allocated for these activities at various events and that one such major event of one day must be organized by the selected tenderer during the duration of the contract.* It follows that the objective of this event is promotion and raising awareness about the ERKC. It is up to the tenderers to propose the way of addressing effectively this objective.

Question 42: What type of contributions is envisaged regarding the promotion and raising awareness about the ERKC - i.e. contributions in the form of a stand or exhibition

material or also active involvement as speakers to present the outputs and outcomes of the ERKC (and furthermore, do you envisage presence at a range of energy conferences around Europe)?

Answer: On page 13 of the Tender Specifications it is stated that *in order to promote and raise awareness about the ERKC among the target groups, sufficient resources need to be allocated for these activities at various events and that appropriate materials for this purpose shall also be presented in the tender, including their costs, and shall be produced by the selected tenderer.* It follows that it is up to the tenderers to address these issues (such as defining the appropriate materials and the appropriate number of events to be included in the scope of promotion and awareness raising activities, as well as other possible contributions, such as delivering speeches) in the tenders, in compliance with the Technical Specifications of the Tender Specifications.

Question 43: At what point of time do you envisage that the media relations elements (i.e. the implementation of the communication strategy) would commence?

Answer: On page 13 of the Tender Specifications it is stated that *the selected tenderer will be required to promote the ERKC, ensuring good coverage throughout the EU and FP7 Associated Countries and that communication plan for achieving this, ensuring also the appropriate media coverage, shall be presented in the tender.* It follows that it is up to the tenderers to address in their tenders the issues related to the communication plan (such as the ones concerning the relations with media), in compliance with the Technical Specifications of the Tender Specifications.

Question 44: We note the requirement for a detailed description of financial resources used to date in the annex of progress and interim reports (pages 15 and 16 of the Tender Specifications). Could you clarify exactly what level of detail will be required?

Answer: The level of detail regarding the *annex* of the Progress Reports and Interim Technical Report (*providing detailed description of the financial resources used under this contract*) should allow the European Commission to understand how the planned financial resources were actually spent, for the internal purpose of analyzing the financial resources used under this contract.