



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR ENERGY
Directorate A – Energy Policy

CALL FOR TENDERS

N°ENER/A1/2013-973

TENDER SPECIFICATIONS

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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 work under some specific contracts under the framework contract is expected to be above 20%.

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

1.5. Content of the tender

The tenders must be presented as follows:

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

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

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

Part D: Technical offer (see section 2.5)

Part E: Financial offer (see section 2.6)

Part F: Power of attorney (for consortia only)

1.6. Identification of the tenderer: legal capacity and status

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

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

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

which applies to the legal entity concerned requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

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

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

Evaluation and award

2.1. Evaluation steps

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

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

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

2.2. Exclusion criteria

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

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

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

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 (i.e. in case of joint tender, the combined capacity of all tenderers and identified subcontractors) must comply with the following criteria:

- The annual turnover of the last two financial years above € 1,200,000.

The following evidence should be provided:

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

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

2.3.2. Technical and professional capacity criteria and evidence

a. Criteria relating to tenderers

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

- The tenderer must prove experience in the field of modelling and analysis of energy system for EU (at aggregate and Member States level) with at least 2 projects delivered in this field in the last 3 years with a minimum value for each project of € 150,000.

b. Criteria relating to the team delivering the service:

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

Project Manager: who has experience in management of team of at least 10 people, who has at least 5 year experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution and who has experience in at least one project:

- of a similar size (as to be covered by specific contracts)

- of similar geographical coverage
- concerning at least one of the fields covered by this call for tender (energy, transport, environment and climate change together with relevant policies of the EU).

At least 3 experts whose combined expertise covers the fields of energy (including energy efficiency and renewable energy), transport, environment and climate change. Each expert shall demonstrate relevant higher education degree and / or 5-year professional experience in at least one of the above mentioned fields.

At least 3 experts in mathematical/systems modelling related to the topics of this framework contract: energy, transport, environment and climate change policies. Each expert shall demonstrate relevant higher education degree and / or 5-year professional experience in mathematical/systems modelling.

At least 2 members of the team shall have effective operational proficiency in English language (C1 level according to the Common European Framework), as guaranteed by a certificate or past relevant experience.

c. Evidence:

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

Tenderers shall provide a concise description of the relevant work/projects performed during the last 3 years. Such a list of the main services and tasks shall contain related amounts, dates and beneficiaries mentioning also the sector they belong to (private/public).

Samples of previous work carried out in the domain of energy systems modeling (by tenderer or members of the project team) should be provided by the tenderer.

Tenderers shall provide with their offer detailed curriculum vitae of each staff member responsible for carrying out the work, including his or her educational background, degrees and diplomas, professional experience, research work, publications and linguistic skills. The CV's should be presented, preferably, in accordance to the Commission Recommendation on a common European format for curricula vitae, available on: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae>.

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.

- **Quality of the proposed methodology** needed to establish long-range energy systems outlooks for both baseline and policy-driven scenarios (see explanations on baseline/scenario/variants in the technical specifications) (30 points – minimum threshold 60%).

This criterion will assess quality of models employed in the exercise as well as the quality of methodological approach for analysis of model outputs.

- **Quality and content of databases to be used** (30 points – minimum threshold 60%).

This criterion will assess credibility of sources, level of detail, length of time-series, geographical coverage, industrial sectors coverage, energy system coverage (energy sources and energy consumption – also in transport), information on technologies and public policies.

Database used for the purpose of modelling should be regularly updated and contain all data series relevant to the modelling, including the input and output of the model. Ideally, this database would include for each data series: an adequate description, a characterization (input, output, policy parameter, etc), its exact source, a time-stamp and its full history. In this case, the proposed type, contents and procedures related to the maintenance and sharing of this database should be described in the proposal, but eventually will need to be agreed with the Commission.

- **Clarity and quality of documentation for modelling, including model descriptions** (20 points – minimum threshold 60%)

This criterion will assess information provided on the operation of the model including the mathematics, assumptions and ways of portraying policy measures in the model.

- **Organisation of work** (10 points – minimum threshold 60%)

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 and resources and the rationale behind the choice of this allocation.

- **Quality control measures** (10 points – minimum threshold 60%)

This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, 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 low score.

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

After evaluation of the quality of the tender, the tenders are ranked using the formula below to determine the tender offering **best value for money**. A weight of 60/40 is given to quality and price.

e.g.

Score for tender x =

$$\frac{\text{total quality score for award criteria for tender } x}{100} \text{ multiplied by } 60$$

+ $\frac{\textit{cheapest price}}{\textit{price of tender } x}$ multiplied by 40

2.5. Technical offer

The technical offer must cover all aspects and tasks required in the technical specification 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 will not be 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.

Tenderers must establish their financial offer for the purpose of the evaluation on the basis of the **separate prices for each type of long-range energy systems outlook** (baseline, scenario and variant) assuming a delivery of 4 baselines, 14 scenarios and 28 variants over 4 years.

These quantities do not prejudice the orders placed by the contracting authority during the performance of the contract.

Prices of baseline/scenario/variant will not be subject to revision during the performance of the contract. Please see definitions of baseline, scenario and variant in technical specifications.

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

Tender price for the purpose of evaluation (price referred to under section 2.4 above) = A + B+ C

price for baseline x 4 = A

price for scenario x 14 = B

price for variant x 28 = C

Technical specifications

Introduction

The Directorate-General for Energy is launching an invitation to tender with a view to concluding a **multiple framework contract in cascade** valid for an initial period of two years from the starting date of the contract. The framework contract shall be renewed automatically up to two times for a period of one year each under the same conditions, unless written notification to the contrary is sent.

By "multiple framework contract" in cascade is meant a situation whereby a framework contract is concluded separately between the Commission and several service providers with a view to ensuring that a contract can be performed in succession by the first one or in its default, by another of the contractors in an specific pre-defined order of succession, stated in each contract.

The Commission intends to conclude a multiple framework contract with the three best ranked tenderers after evaluation of the tenders (see section 2.4. above).

Following the conclusion of the framework contracts, the contracting authority (the Commission) may invite the selected contractor to submit a bid for a specific assignment in accordance with article I.4.1. of the framework contract.

1. General background

Over the last years, the European Commission ensured that the development of energy strategies, policies and legislation has been supported by robust energy system analysis providing a comprehensive and consistent picture of the European energy system and its evolution. Energy modelling is an important quantitative tool for providing such analyses of energy system trends as well as the effects of alternative framework conditions (e.g. world energy prices, macro-economic developments or policies). Energy modelling has been a key element of Impact Assessment for the European energy policy in 2020 and 2050 perspective as well as for specific legislation on energy efficiency.

It is of key importance for the European Commission to identify the likely impacts of policies promoting energy efficiency, renewable energy sources, climate change mitigation or policies concerning nuclear energy as well as other technologies (e.g. CCS). The likely impacts of policies improving transport sustainability are also important to identify. It is expected that energy modelling can provide a quantitative basis for trend projection (baseline or reference case) for energy system with current policies maintained at current intensity throughout the projection period. At the same time energy modelling needs to show the dynamic consequences of changes in framework conditions or policies in the fields mentioned above by providing the quantitative basis for scenario analyses. Consequently, the modelling work has to include the determining factors of energy and transport demand as well as the different sources of energy supplies and renewables in particular.

On the basis of the quantitative input, the descriptive analysis can be made on the major trends in the energy system and how those trends can be shaped under the influence of policies. Such analysis is used to inform the policy-making of the European Commission.

2. General and specific objectives

The **general objective** of the framework contract is to **provide a series of long term quantitative energy system outlooks for the European Union (EU) as well as separately for its all Member States**. The current candidate countries should be covered as well (Turkey, FYROM, Montenegro, Serbia and Iceland) and - by preference - also other European countries (i.e. members of European Economic Area and the countries of South East Europe).

Given the long lifetime of energy investment and the long term impact of energy on e.g. climate change **the time horizon for the modelling should be 2050**.

The **key deliverables of the contract will be baselines, scenarios and variants**.

Definitions:

Baseline is a complete and internally consistent energy-economy-transport-environment outlook having the features of a development on the basis of current trends and policies against which policy scenarios and variants can be assessed. A baseline is built around a fresh long-term macro-economic and energy import price outlook.

Scenario is a complete and internally consistent view of the future being based on a set of alternative assumptions especially on policy approaches and instruments. There are substantial differences in a sub-set of the assumptions for the modelling between the baseline and each of the scenarios.

Variant: is a complete and internally consistent view of the future however involving only a few parameters to be changed, e.g. looking at somewhat higher or lower GDP growth including the changes for the components of GDP, with subsequent evaluation of energy, transport and emission consequences.

Scenarios and variants will be related to a baseline showing effects of new policies for scenarios and other minor changes in framework conditions for variants.

The contract must enable the modelling on aggregated EU level and more detailed country by country level **with the same model calibrated to the EU as well as each countries energy system**, which will ensure better communication with Member States energy experts and allow also for regional disaggregation of EU results. The energy modelling needs to comprise the whole energy system including its driving forces, such as industrial production, heating and cooling in households and services, electricity consumption as well as freight and passenger transport demand. The modelling should focus also on power sector giving due regard to CHP.

The model(s) must contain appropriate linkages between Energy-Transport-Economy-Environment fields. The energy system modelling needs macro-economic modelling input - by preference with the possibility to simulate feedbacks from the energy system to the economic system.

The **specific objectives** of the contract are:

- The **first specific objective** of the contract is to provide detailed quantitative results of **supply and demand by energy source and by sector of activity**. The model(s) should be able to handle the **power sector, heating and cooling as well as transport sectors** in detail. The contractor should pay particular attention to available energy efficiency studies for the calibration of both the supply and demand side of the model(s). Specific modelling efforts should be devoted to take account of policy instruments in place and under discussion, such as energy and carbon taxes, emission trading and ceilings, standards, renewables requirements and other regulation, labelling, and voluntary agreements. Likewise specific efforts should be devoted to modelling of wholesale/retail electricity market liberalisation, broader retail electricity markets reforms, changes in administrative arrangements of grids (e.g. network codes and development conditions for renewables)
- The second **specific objective of the contract is to allow for the calculation of relevant energy policy indicators**, especially on energy efficiency and renewable energy sources (such as carbon values in both energy trading system (ETS) and non-ETS sector, energy intensity of the GDP, carbon intensity of the fuel mix, share of renewable energies in final energy consumption, security of supply and others).
- The third **specific objective of the contract** is for the modelling results to deliver **European energy prices, capital and operational costs for industry and investment needs as well as grid development**. The framework contract shall include a world energy model to analyse world developments and to derive assumptions on energy import prices.
- The last **specific objective of the contract is also to deliver emission level projections** for greenhouse gases (GHG) in particular CO₂ (for which the base-year is 1990) and should be available also for SO₂, NO_x, CH₄ and N₂O. Emissions of other pollutants should also be provided especially those relevant for transport activities.

The contractor will use **existing models and databases** as the timing for deliverables does not allow for the development of new models/databases. If a tenderer cannot yet **demonstrate** pertinent previous **modelling up to 2050**, the tenderer should describe in detail how the extension of the time horizon will be approached to ensure rapid delivery of projections. This applies also for the **geographical coverage** which must encompass Member States, whereas EU candidate countries as well as other European countries should be included as well.

The contractor will use Eurostat conventions and statistical methodology and wherever possible official data sources of Eurostat and IEA, complemented by the ECB/UN/World Bank/ IMF for economic data.

The work should be undertaken at the level of detail as published by the European Commission in “European Energy and Transport – Trends to 2030” in 2003 and its updates in 2007 and 2009², as well as the Energy Roadmap 2050³.

² Please see: http://ec.europa.eu/energy/observatory/trends_2030/index_en.htm

3. Scope and tasks

On the basis of the **Framework Contract**, the Commission will request the provision of long range energy system outlooks, i.e. baselines, scenarios or variants by means of **Specific Contracts**. The Commission may also request combinations of such baselines/scenarios/variants in order to exploit synergies between the different services and to optimise the administration of the modelling through the conclusion of specific agreements. All specific contracts will encompass a combination of modelling and reporting tasks on the basis of the above baselines, scenarios or variants

Specific contracts may involve the identification of areas of policy concern or the analysis of the implications of planned policy measures especially in the fields of energy efficiency, renewables and CO₂ reduction including via CCS and nuclear energy uptake.

The concrete work content will be fixed in Specific Contract between the Commission and the contractor on the basis of this Framework Contract. **The Commission will provide an outline for the modelling services required.** The work to be undertaken will include:

- developing the macro-economic outlook on which the energy modelling will be based;
- conducting world modelling and background analysis for determining the assumed future development of energy import prices;
- running the energy model(s) for the individual countries;
- providing summary level results and analyses at country and EU level as well as, where appropriate, analyses at a wider European or the world level on the basis of the modelling results obtained.

The **modelling work will comprise in particular:**

i) Collection of all the necessary information

This includes the collection of the latest statistical data and principal indicators using official statistics including energy balances (from Eurostat, EEA, IEA, UN, World Bank, Member States etc.) wherever available. Such data include: population, GDP and its components, energy balances, transport statistics, emission statistics and the indicators on the basis of such statistics such as energy intensity, share of renewables in gross final energy consumption, renewables share in gross electricity consumption, import dependency, modal split in transport, sustainability indicators, etc.

³ Please see: http://ec.europa.eu/energy/energy2020/roadmap/index_en.htm

The contractor needs to be able to compare projections produced in energy modelling with statistics, e.g. the development of GHG and CO₂ in particular compared with their 1990 levels (base-year for the Kyoto protocol).

Any data supplied to the contractor by the Commission is to be treated as confidential.

ii) Execution of modelling work and verification of results

The model runs will be undertaken using a recent base-year for model calibration. The results should be calculated and available at least for every five year period i.e. 1990, 1995, 2000, 2005, 2010, 2015, ..., 2050.

The output from the model(s) must be checked against external sources to ensure that the results obtained are reasonable and robust before submission to the Commission. The results should also take into account the previous Impact Assessments and 2030 scenarios prepared by the European Commission.

The results must be transparent, i.e. it must be possible to trace and explain why the results are as they are. The Commission may require the consultant to provide additional information on the modelling in order to ensure transparency of the modelling and the robustness of results in full respect of intellectual property rights. The results must be provided for countries modelled as well as aggregated into appropriate geographical groupings (notably EU) according to the specifications of the Commission. Data sheets on world energy developments have to be provided where appropriate.

During the verification procedure, multiple re-runs of the model may be required for each deliverable until results are proven to be robust, justifiable and in agreement with the respective EU and individual policies of Member States.

After each run, the main modelling results should be presented in concise reports, whose format, contents and structure will be agreed with the Commission and may need to be revised more than once during the duration of the contract.

iii) Drafting of the analysis reports

Analytical reports need to be drafted concerning, most often, the EU in its current geographical composition (at present EU-28), EU-15 where appropriate for reasons of comparison with historical data or EU in view of a forthcoming further enlargement - on the basis of the countries modelled. Moreover, the reporting should also be available for the complete group of European countries modelled. Finally, for those specific tasks where world modelling was undertaken analytical reports on the main results are also required.

The model output and the assumptions for each baseline, scenario and variant need to be described for each country as well as the consolidated results at EU and at other appropriate level(s) (e.g. all European countries modelled).

The analytical reports will place particular emphasis on the long-term trends, differentiated by sector of economy and energy source, in: demand for energy, energy production, energy transformation (in particular power and heat generation), energy prices, costs and investments. Transport developments should be addressed by distinguishing between passenger and freight transport as well as modes both in terms of transport activity and

energy demand. The modelling should include projections of GHG and pollutant emissions.

The modelling output shall also enable exploring and analytical reporting on options for greenhouse gas abatement including the relevant energy and transport policies for achieving appropriate emission cuts. Data on investment requirements, especially in power and heat generation, should be stated and analysed. The economic, political, regulatory and environment factors influencing the market for energy should be also analysed.

Special emphasis in reporting should be placed on energy and transport demand and their driving forces as well as on the market conditions for renewables and energy efficiency (in buildings, electric appliances and other areas). The development of competition between various forms of energy should be analysed in view of renewables penetration and the overall policy objectives: energy security, sustainability and competitiveness including completion of the internal market.

4. Input by the Contracting Authority

To ensure relevance of the modelling work for the development of an energy policy for Europe, the policy parameters of scenarios and variants will be set out by the Commission.

The Commission will provide guidance on the policy initiatives and legislation enacted so far on the European level.

The databases of the European Commission (Eurostat) are publicly available but if necessary the Commission might assist in the contacts with Eurostat in order to facilitate the data extraction and analysis.

5. Intermediate outputs and deliverables for the specific contracts

An Inception Report showing the work programme shall be submitted to the Commission 1 month after the signature of the specific contract.

A **Progress Report** showing advancement of the work (including draft modelling outputs as listed in the specific contract) shall be submitted to the Commission, at a point in time (months after the date of signature of the contract) laid down in the respective specific contract.

Each specific contract will require different deliverables and possibly their combinations. The table below shows standard timeframe under which draft deliverables can be requested.

draft Baseline	within 9 months of contract signature
draft Scenarios	within 3 months of contract signature
draft Variants	within 6 weeks of contract signature

6. Final output and deliverable for the specific contracts

The contractor will submit a Final Report (including modelling output(s) and written analytical reporting) at a point in time (months after the date of signature of the contract) laid down in the respective specific contract.

The table below shows standard timeframe under which final deliverables can be requested:

Final report including a Baseline	within 15 months of contract signature(*)
Final report including scenarios but no baseline	within 6 months of contract signature
Final report including only variant(s)	within 3 months of contract signature

(*) The Baseline elaboration process has to allow for consultation with Member States experts, organised by the Commission services, on country specific modelling results. Pertinent comments of Member States experts shall be taken into account when finalising the Baseline.

The final version of the reports shall fully reflect the Commission's comments received on progress report and draft final modelling results delivered.

For each country and aggregated region (e.g. EU) the following needs to be provided: a summary balance sheet broken down by relevant sectors and energy sources, a detailed sheet on power and heat generation including inputs and output as well as necessary capacities and investments, a detailed sheet on transport including activity and energy demand data, detailed tables on energy demand in other final demand sectors, emission tables, cost/price information as well as appropriate indicators such as energy intensity, share of renewables, import dependency, carbon intensity and emission trajectories compared with the appropriate base-year.

The analytical reports at EU or other appropriate level(s) should contain a detailed description of the methodology, assumptions and an analysis of the main modelling results and be illustrated with key graphics to be produced on paper and in a mutually agreed electronic format. The reports and numerical annexes should be prepared in such a way that they can be published, which includes lay-out but not printing.

2 copies of the final reports shall be supplied in paper form and one copy in electronic form, in an agreed format. Extensive numerical annexes should be provided on CD or DVD in agreement with the Commission.

7. General delivery time and progress meetings foreseen with the Contracting Authority

The framework contract shall be signed for an initial period of two years from the starting date of the contract. The framework contract shall be renewed automatically up to two times for a period of one year each under the same conditions, unless written notification to the contrary is sent.

Execution of the tasks for a specific assignment begins only after the date on which the specific contract enters into force.

In principle, the deadlines set out in the specific contracts 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.

A general **kick-off meeting** will take place in (Brussels), at the latest 30 days following the signature of the framework contract, in order to settle all the details of the work to be undertaken. For specific contracts, a kick-off will take place only when a baseline is part of the assignment.

Following the submission of the draft final deliverables, meetings may be organised in Brussels to discuss the Commission's observation. The exact date will be agreed upon with the Contractor.

8. Performance and quality requirements

Energy system modelling proposed by the tenderer must be capable of delivering the results for EU as a whole and all Member States up to 2050 in at least 5-year intervals. The following items must be modelled:

- energy production
- energy consumption broken down by relevant sectors and energy sources
- power and heat generation including inputs and output as well as necessary capacities and investments
- transport including activity and energy demand data,
- energy demand in other final demand sectors,
- GHG and pollutant emission tables,
- cost/price information for energy and ETS allowances
- appropriate indicators such as energy intensity, share of renewables, import dependency, carbon intensity and emission trajectories compared with the appropriate base-year.

The contractor will use **existing models and databases** as the timing for deliverables does not allow for the development of new models/databases.

9. Intellectual property rights

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

10. Framework contract ceiling

Specific contracts cannot be concluded any longer once the budgetary ceiling of the framework contract has been reached.

The calculation of the maximum budgetary ceiling shall be made as follows:

- 1) For each item, unit prices are multiplied by the following estimated purchase volumes for the total duration of the framework contract: 4 baselines, 14 scenarios, 28 variants.
- 2) The maximum ceiling is determined by the sum of the total value per items calculated under point 1) and increased by a "security margin" of 10% of the total estimate framework contract value.

The ceiling will be based on the unit prices of the most expensive tender.

Volumes (in number of items) on which the final maximum ceiling in Euro will be calculated are indicative.

ANNEXES

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

ANNEX 1

IDENTIFICATION OF THE TENDERER

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

Call for tender ENER/A1/2013-973

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 2

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

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

[Choose options for parts in grey between square brackets]

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

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

or

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

full official name:

official legal form:

full official address:

VAT registration number:

➤ declares that [the above-mentioned legal person][he][she] is not in one of the following situations:

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

➤ (*Only for legal persons other than Member States and local authorities, otherwise delete*) declares that the natural persons with power of representation, decision-

making or 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 3

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 4

DRAFT CONTRACT