

TENDER SPECIFICATIONS
ATTACHED TO THE INVITATION TO TENDER

Invitation to tender No. ENER C2/2010-513-1 concerning
ENERGY RESEARCH KNOWLEDGE CENTRE

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I TECHNICAL SPECIFICATIONS

I.1 Introduction

The European Commission (EC) is launching this invitation to tender for services with a view to concluding a contract with a service provider (or consortium) for the development and maintenance of the comprehensive Energy Research Knowledge Centre (ERKC) within the SETIS website¹.

SETIS², led by the Joint Research Centre and coordinated by its Institute for Energy³, is the EC's Information System for the European Strategic Energy Technology Plan (SET-Plan⁴).

ERKC will gather and analyse all information regarding the European Union (EU) energy research⁵, conducted on the EU level as well as on the Member States level, and will disseminate this information through a specific portal to be hosted by the SETIS website. The ERKC portal shall also include information on energy research conducted on the level of the Associated Countries⁶ to the FP7 (The Seventh Framework Programme⁷). Opening towards energy research information from other countries would be an asset.

Principal potential users of the content published on the ERKC are the research, industry and academic communities within the EU and policy makers at the EU and national levels.

Analyses and valorisation of the results arising from the completed energy research projects as well as presentation of on-going energy research projects are crucial for progressing towards the SET-Plan objectives and for optimising the EU energy research activities. The ERKC will therefore complement and support SETIS.

The scope of the ERKC shall primarily cover the energy research sectors defined as the existing and potential SET-Plan's European Industrial Initiatives (EIIs⁸) - such as Bioenergy, Electricity Grid, Nuclear, Solar (Photovoltaics and Concentrated Solar Power), Wind, Energy

¹ See <http://setis.ec.europa.eu/>

² The contact point of SETIS will be provided to the selected tenderer after the contract signature

³ See <http://ie.jrc.ec.europa.eu/>

⁴ See http://ec.europa.eu/energy/technology/set_plan/set_plan_en.htm

⁵ The term "energy research " concerning this tender refers to energy research and demonstration

⁶ See ftp://ftp.cordis.europa.eu/pub/fp7/docs/third_country_agreements_en.pdf

⁷ See http://cordis.europa.eu/fp7/home_en.html

⁸ See http://ec.europa.eu/energy/technology/set_plan/doc/setplan_brochure.pdf

Efficiency (Smart Cities) and CO₂ Capture, Transport and Storage - and European Energy Research Alliance's Joint Programmes (JPs⁹), such as Geothermal energy. New EIIs, JPs and similar initiatives under the SET-Plan may be established during the duration of the contract and the corresponding energy research sectors shall be included in the scope of the ERKC. In addition to that, information on other energy research sectors (possibly being, but not limited to, electricity storage, ocean energy, hydropower, cogeneration of heat and power, advanced fossil fuel power generation, nuclear fusion, fuel cells and hydrogen) shall be included. Relevant information on private investments in energy research, basic energy research, materials, manufacturing and other issues having impact on energy research sectors shall also be included in the later phases of the contract and the EC will welcome proposals on how to further develop the ERKC in this respect.

The results of the energy research projects and clusters of projects funded by the EU or Member States shall be presented in a clearly structured and user friendly manner. Individual project's information shall be complemented by the selected tenderer with information about the issues relevant for that particular energy research sector as a whole - in line with the analytical framework developed in the Technology Mapping¹⁰, Capacities Mapping¹¹ and Technology Roadmaps¹². Appropriate reporting tools shall be developed for this purpose.

The expected outcomes of this tender are therefore the following:

- The ERKC will present and promote the EU and Member States' energy research projects and the EU and Member States' programmes providing the funding for energy research projects;
- it will analyse, present and disseminate the results of these projects in coordination with SETIS;
- it will gather and provide access to a common pool of energy research knowledge and information to all the stakeholders, thus facilitating their communication and speeding up the pace of innovation (e.g. via presenting analyses of particular energy research sectors).

The contract shall be concluded for a period of 36 months, including the period of transferring the ERKC to SETIS. Development of the ERKC shall be carried out in close cooperation and coordination with the SETIS, into which the ERKC shall be integrated.

The ERKC section of the SETIS website must become the leading energy research portal in the EU.

⁹ See http://www.eera-set.eu/Research_Fields

¹⁰ See <http://setis.ec.europa.eu/about-setis/2009-technology-map-final-draft>

¹¹ See <http://setis.ec.europa.eu/about-setis/analyses>

¹² See <http://setis.ec.europa.eu/about-setis/technology-roadmap>

I.2 Rationale and aims

I.2.1 Background information

The Treaty of Lisbon¹³ puts at the heart of its research and technological development objectives the establishment of a European research area in which researchers, scientific knowledge and technology circulate freely.

The mapping of energy research programmes and projects will improve the access to energy research knowledge, allowing it to be timely exploited and used across the EU, thus also increasing the pace of further innovation. It is therefore of outmost importance to gather, analyse and disseminate the information and knowledge arising from the energy research projects and the programmes funding the energy research projects.

I.2.2 Strategy

The priority of the ERKC shall be a complete presentation of the EU energy research programmes (such as FP7, EEPR¹⁴, RFCS¹⁵) and all EU funded energy research projects under these programmes. In a similar manner, the ERKC shall gather the information on national and regional energy research programmes and projects from the Member States (such as NER 300¹⁶). Some energy research related information on the level of the FP7 Associated Countries should also be included.

The ERKC should become the central information point on European, national (and regional) energy research priorities and programmes, facilitating the Member States' joint programming (i.e. coordination of the national research programmes and common research agendas). A close cooperation with the key stakeholders (e.g. National Contact Points¹⁷, European Technology Platforms¹⁸, EIIs and ERA-NETs¹⁹) is crucial for achieving this goal. The selected tenderer should establish and maintain contacts with such stakeholders in coordination with SETIS. A plan for achieving this shall be presented in the tender.

¹³ See http://europa.eu/lisbon_treaty/full_text/index_en.htm

¹⁴ See <http://ec.europa.eu/energy/eepr/>

¹⁵ See <http://cordis.europa.eu/coal-steel-rtd/>

¹⁶ See http://ec.europa.eu/clima/funding/ner300/index_en.htm

¹⁷ See http://cordis.europa.eu/fp7/ncp_en.html

¹⁸ See <http://cordis.europa.eu/technology-platforms/>

¹⁹ See http://cordis.europa.eu/fp7/coordination/about-era_en.html

The initial profiles of all the energy research projects funded by the Directorate General for Energy (DG ENER) and Directorate General for Research (DG RTD) under the Energy and other themes of the FP7 programme as well as the initial profiles of all the energy research projects (such as ICT Systems for Energy Efficiency and Smart Energy Grids) funded by the Directorate General for Information Society and Media (DG INFSO) under the ICT – Information and Communications Technologies theme of the FP7 programme shall be available on the ERKC website, linked to the SETIS website, shortly after the contract signature. The EC shall provide such initial data to the selected tenderer, based on the contracts signed under the FP7 calls for proposals (possibly containing, but not limited to, the project title, abstract of the project description, FP7 Area/Activity/Topic under which the proposal was submitted, duration of project, estimated eligible costs, requested EU funding and data about the potential beneficiaries).

1.2.3 General issues

An international team of experienced energy experts, energy research experts, information technology specialists and communication professionals is needed for delivering the requested outcomes. Such team of competent individuals is to be proposed in the tender (and presented also through their Curriculum Vitae) and led by a project manager with proven experience of providing deliverables on time, at commonly agreed high level of quality and completeness, based on the agreed methodology.

The selected tenderer shall, in close cooperation with SETIS, develop the methodology and framework for gathering, analysing and presenting the results of projects and clusters of projects, allowing the EC to use it without restrictions in its future activities.

The services to be delivered shall cover the EU, Member States and FP7 Associated Countries.

The selected tenderer must ensure that no restrictions based on personal data and/or confidentiality and/or intellectual property rights are to be expected from any third party due to the publication of any data and documents on the ERKC section of the SETIS website. The selected tenderer must fully respect the intellectual property rights and ensure that no confidential content is published on the ERKC section of the SETIS website. Should the tenderer for providing the deliverables or services under this contract intend to use any data which cannot be published, this must be explicitly mentioned in the tender.

The contents published by the selected tenderer must be published impartially and independent of any special interests. The ERKC section of the SETIS website should not be used for the distribution of interest-based information (besides clearly identified events and news items) or for third-party advertising.

The contents published on the ERKC section of the SETIS website shall be open to public access and must therefore be subject to the selected tenderer's internal quality control, based on the validation criteria established by the selected tenderer in agreement with SETIS.

The ERKC shall remain consistent with the visual identity of the EC. Funding from the FP7 shall be acknowledged.

Appropriate coordination shall ensure from the very beginning of the ERKC development that the ERKC complements various EU initiatives in the area of energy research (especially SETIS and CORDIS²⁰), thus avoiding unnecessary overlapping and exploiting synergies. Tenderers are responsible for identifying relevant EU initiatives other than SETIS and explain in their tenders how they will interlink and build synergies with them as it may be necessary.

Tenderers shall address in their tenders the issue of certain data being available across the Member States in languages other than English. Translation costs shall be included in the tenders.

I.3 Work Packages

The tender is structured in 6 work packages (WPs) which will be implemented in an integrated way during the duration of the contract:

- * The objective of **WP 1 (Project and quality management)** is to ensure an effective management of the project as well as application of a sound quality management system.
- * The objective of **WP 2 (Establishment of the ERKC portal to be housed within the SETIS website)** is to develop and maintain the leading energy research portal in the EU, in coordination with SETIS.
- * The objective of **WP 3 (Data gathering)** is to gather all the required data, in consultation with SETIS.
- * The objective of **WP 4 (Data analysing)** is to analyse the gathered data at scientific level and at policy level in collaboration with SETIS, in order to provide a sound information basis for policy makers, researchers and energy professionals.
- * The objective of **WP 5 (Dissemination)** is to disseminate all the knowledge arising from the data gathering and analysis.
- * The objective of **WP 6 (Transfer to SETIS)** is to provide all the necessary procedures and means to guarantee a smooth transfer of the ERKC to SETIS in order for SETIS to fully take over all the ERKC activities once the contract is finished.

WP 1: Project and quality management

The selected tenderer must follow an integrated approach to the overall management of the work, including coordination with the other EU initiatives in the area of energy research. The selected tenderer should identify all such initiatives and establish and maintain contacts with them in order to exploit synergies and avoid unnecessary duplication.

²⁰ See http://cordis.europa.eu/home_en.html

A system for quality control of all information provided on the ERKC section of the SETIS website should be proposed by the selected tenderer. Broken links must be replaced or removed and contact data must be regularly updated.

The selected tenderer must regularly carry out self assessments of the used procedures and means in order to optimise them.

To be able to adapt to the evolving EU policy context and priorities, the selected tenderer should provide a flexible and dedicated management of the ERKC development. The selected tenderer should be able to respond to requests from the EC within 3 working days (or within 3 working days provide justification for a different proposed deadline). The selected tenderer may (up to 4 times per year) be requested by the EC to attend meetings in Brussels (Belgium) or Petten (The Netherlands) with the aim of coordinating and evaluating the activities and exchanging information. Additional meetings carried out via internet or telephone may be requested by the EC. A sustained contact should be maintained with SETIS and the tenderers are requested to propose appropriate means for achieving this.

At the latest 15 days following the signature of the contract, a kick-off meeting between the selected tenderer and the EC will be held in Brussels. This meeting will ensure that the selected tenderer has a clear understanding of the terms of contract and objectives of the ERKC.

Within 3 months after the signature of the contract, an Inception Report shall be submitted, outlining a detailed work plan and elaborating on the proposed data gathering approach. The inception meeting will review the Inception Report. A set of performance indicators, proposed by the selected tenderer, will be agreed with the EC and used at later stages for assessing the outcomes of the ERKC.

The implementation of the contract will be monitored through Progress Reports (submitted 6, 12, 24 and 30 months after the signature of the contract) and Interim Technical Report (submitted 18 months after the signature of the contract), all of them giving a full overview and evaluation of the implementation, use of resources, main achievements, outputs and impacts, as well as any problems encountered and the updated plan of further activities. Progress Reports and Interim Technical Report will be reviewed during the meetings between the EC and selected tenderer. The tenders should include quantitative targets for monitoring the implementation of the contract, with schedule of submitting them to the EC. For example, full sets of the ERKC section of the SETIS website access statistics (including downloads, online feedback, numbers of visitors, origins of visitors, the e-mailing list development, etc.) shall be provided regularly.

The tenders shall include all the tenderer's expenses for the abovementioned meetings held in Brussels (Belgium) or Petten (The Netherlands) and also for any other travels and any other work of the tenderer's staff and/or tenderer's subcontractors needed for providing the deliverables requested by this tender. 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.

An External Support Network, composed of relevant experts and stakeholders, can be set up by the selected tenderer. Members of such network in case of its establishment shall provide advice to the selected tenderer on relevant issues, such as on strategy, data validation,

dissemination (including identifying new and multiplying existing dissemination channels), user requirement analyses, outputs to be produced and events to be organized and visited. The External Support Network's composition in case of its establishment shall also include the expertise needed in other areas, such as for redrafting the texts for their easy reading and understanding, data analysing and development of the portal structure. The composition and the costs of such network, in case the tenderer intends to establish it, shall be presented in the tender, ideally including the CVs of its potential members.

WP 2: Establishment of the ERKC portal to be housed within the SETIS website

The tenderer must ensure that the ERKC section of the SETIS website is user friendly, easy to navigate, flexible in terms of its further development and attractive. The appropriate infrastructure for collecting, validating, publishing, maintaining and updating the information shall be available.

The ERKC portal shall be developed in such a way that it can be fully integrated into the SETIS web platform in a way specified in detail in cooperation with SETIS after the contract is signed. The platform which the contractor uses for managing the website should be made available to the SETIS.

The ERKC portal shall be hosted on the SETIS's hardware, available to the selected tenderer free of charge, respecting SETIS's requirements. A preliminary description of server requirements shall be provided in the tenders.

The current version of SETIS website is implemented using Plone 3 open source content management system (CMS) running on a Windows server. Other CMS in use is Drupal. Should the tenderer propose for the ERKC any CMS other than the two abovementioned CMSs, 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.

The relational database currently in use in SETIS is Oracle 10g. Application development tools are Adobe Flex, JavaScript, PHP and Python.

The BIOMAP²¹ or equivalent website – presenting a visual navigable dissemination tool with the interrelated entities linked in a visual interface comprising a list view, a non-geographical map view and a geographical map view over time – can serve as an inspiration.

Tenderers shall present the proposed structure of the ERKC in their tenders. The proposed structure of the ERKC will be further developed by the selected tenderer in cooperation with the SETIS. The ERKC website shall include a section on energy research projects data and analyses; a section on EU and Member States' energy research funding programmes, mechanisms and institutions; events section with forthcoming events and events archive; a section containing links to a broad range of energy research information sources, such as EU and Member States' institutions, various networks and associations, agencies in the field of energy research, funding organisations, specialised media, etc.; news section with the relevant

²¹ See <http://setis.ec.europa.eu/BIOMAP/> or <http://eu-biomap.net/>

energy research news and news archive; a section of e-Publications including the Thematic Research Summaries and Policy Brochures (both further described under the WP 4 of these tender specifications), Newsletters, Press releases and Articles from specialized press based on fully respecting the copyright issues; a section with ERKC portal contacts, Legal notice, FAQ; and section or sections with other energy research related information, presented in various forms, including pictures, photos and possibly also videos.

Tenderers shall in their tenders also include the development of the ERKC into a communication platform, offering various stakeholders (acting either in their personal or professional capacity) the possibility of exchanging the ideas, presenting plans, raising questions and being able to discuss any energy research related issues with the other users of the ERKC. Various interactive tools (such as blogs and discussion forums) should be part of the ERKC portal.

The ERKC must have a well developed search function. It is of outmost importance that the users are able to find the searched information easily and quickly.

The ERKC content shall include attractive visual elements (such as photos of the projects and graphs).

The ERKC shall offer the possibility for users to contribute various relevant contents to the ERKC portal, subject to the selected tenderer's appropriate verification before potentially publishing them. The decision on publishing such contents, based on the prerequisite of all such contents to be published impartially and independent of any special interests (besides clearly identified events and news items), shall be made by the selected tenderer after obtaining prior approval for publication from the SETIS.

Tenderers shall in their tenders explain how the feedback from the ERKC users is to be collected and evaluated.

The ERKC shall have a helpdesk that should be able to respond in English to queries directly related to the information published on the ERKC portal within 5 working days.

The information on the ERKC shall be provided in English, with relevant links to other websites containing energy research related information in any language. 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.

The selected tenderer must maintain and update all sections of the website throughout the duration of the contract. "News" updates should be made on a bi-weekly basis. 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.

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. 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. Tenderers shall include such survey in their tenders.

The ERKC website shall be a copyrighted product of the EC.

WP 3: Data gathering

The data gathering and keeping them up-to-date shall include the data about all the FP7 energy research projects, all the current and planned EU programmes and Member States' programmes funding energy research (including the data on relevant energy research projects funded by Member States' programmes and finished from 1 January 2008 onwards or still ongoing), and other energy research related data (such as relevant information on private investments in energy research, basic energy research, materials, manufacturing and other issues having impact on energy research sectors). It is the responsibility of the selected tenderer to identify all the current and planned EU programmes and Member States' programmes funding energy research and the projects funded under them, gather the relevant data and, when needed, redraft them into brief, clear, concise and easily understandable contents. All relevant publicly funded or co-funded energy research activities of the EU and Members States under the energy research funding programmes shall be included, also adding relevant data from other countries (such as FP7 Associated Countries). The tenderers must in their tenders propose the definition (subject to its possible modification and approval by the EC) of the abovementioned term "*relevant*" regarding the abovementioned "*relevant* energy research projects funded by Member States' programmes".

Data gathering of qualitative as well as quantitative information about energy research projects and programmes in the EU shall be following standard forms, proposed by the selected tenderer and approved by the SETIS, e.g. the Project Forms consisting of Project Profile information at the start of a project and the Results Summary information at the end of a project. The exact content of the standard forms - possibly containing, but not limited to, the data such as the project title, project's description (including stating its relevance to the European Industrial Initiatives), location, budget (including presenting the project's total costs as well as any funding or co-funding received from any public resources), timeline (with the start date as well as the end date of the project), goals and objectives, current stage, results including outcomes in various forms (such as patents, readiness for deployment, potential impact on reaching the EU energy research related objectives, such as of the EU's growth strategy Europe 2020), data about the programme under which the proposal is or was funded and contact data about the beneficiaries - shall be decided after the signature of the contract with the selected tenderer and may be revised during the duration of the contract, in line with the EC's evolving needs. Some data concerning the project results shall be quantified to feed in monitoring of the SET-Plan via the on-going evolution of the Key Performance Indicators (KPIs²²) and the Capacities Mapping. Further information on the KPIs will be provided by SETIS and discussed with the selected tenderer at the beginning of the contract.

The EU funded energy research projects are to be given first priority in terms of the data gathering. In the Inception Report the selected tenderer shall present the plan and schedule for

²² See <http://setis.ec.europa.eu/activities/initiatives/key-performance-indicators-kpis>

data gathering concerning the energy research projects funded by the EU and plan and schedule for data gathering concerning the energy research projects funded by Member States.

The tenders must include proposed strategy for establishing and maintaining contacts and good working relationships with a wide range of possible data providers from the EU, Member States and FP7 Associated Countries. Special attention shall be given to the fact that majority of the data would only be made available to the ERKC on the voluntary basis. A clear and together with SETIS further developed strategy for establishing and maintaining contacts and good working relationships with a wide range of possible data providers is thus indispensable.

WP 4: Data analysing

Throughout the duration of the contract, the results of each energy research project obtained thorough the data gathering shall be assessed under scientific and policy aspects. The projects' data shall be analysed in a relevant manner, such as against the progress in the field and/or against their contribution towards the SET-Plan, according to the analysing plan and approach proposed by the selected tenderer and subject to the approval by the SETIS.

In cooperation with SETIS, the results of the projects that have made the most significant contribution to each of the energy research sectors will be reported in up to 45 Thematic Research Summaries within the duration of the contract (based on annual plans agreed between the SETIS and the selected tenderer), providing an overview of the projects within the energy research sectors and presenting issues such as the policy background, reviewing the key results, addressing any contradictions arising from those results and identifying their general policy implications. These Thematic Research Summaries are mainly intended to be used by policy makers at the EU and national levels, but may also be useful for the academic, research and industry communities. Thematic Research Summaries²³ shall follow the format and layout agreed with SETIS.

In cooperation with SETIS, who has the lead responsibility to benchmark progress on the policy front, 15 Policy Brochures for an agreed set of policy topics shall also be drafted by the selected tenderer within the duration of the contract (based on annual plans agreed between the SETIS and the selected tenderer), providing more detailed assessments of the key project results implications on the policy issues in question. The choice of policy issues and the priorities regarding the policy topics to be addressed will remain open in order to respond to the EC's evolving needs. Policy Brochures²⁴ shall follow the layout agreed with SETIS.

The abovementioned reports shall be prepared by the selected tenderer and coordinated with SETIS on the basis of agreed annual planning. They must be subject to the selected tenderer's internal quality control and subject to SETIS's approval prior to publishing.

Tenders should include proposals on the structure of the abovementioned reports.

²³ See various examples on <http://www.transport-research.info/web/publications/thematic.cfm>

²⁴ See various examples on <http://www.transport-research.info/web/publications/policy.cfm>

WP 5: Dissemination

The contents presented on the ERKC portal must be clearly structured in a way that enables its users to quickly find the relevant information, such as by dividing the content by energy research sectors and by including the information on the corresponding open and foreseen calls for proposals under the various EU and Member States' programmes.

The ERKC user requirements shall be defined by the selected tenderer, based on surveying the users' perceptions regarding the structure and content of the ERKC. The ERKC users' feedback shall be gathered through various channels, such as the ERKC website and systematic use of the questionnaires at events. The collected feedback shall be presented in the Progress Reports and in the Interim Technical Report.

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. 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.

The selected tenderer will be required to promote the ERKC, ensuring good coverage throughout the EU and FP7 Associated Countries. All Member States shall be included appropriately in the scope of promotional and awareness-raising activities. Communication plan for achieving this, ensuring also the appropriate media coverage, shall be presented in the tender, addressing also the issue of potential lack of interest for the energy research in some countries. Communication plan should also present actions aiming to reach the target groups through various networks and other multipliers.

The Thematic Research Summaries and the Policy Brochures, mentioned above in the previous work package (WP 4), shall be produced in English in electronic formats. The 15 Policy Brochures, mentioned above in the previous work package (WP 4), shall also be produced in English in paper form, each one of them in 800 copies of up to 32 pages of glossy brochures of finished size of 172 x 245 mm. All the costs related to the Thematic Research Summaries and the Policy Brochures shall be presented in the tenders.

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. Appropriate number of such events and all the costs related to them shall be presented in the tenders, but proposals of the exact events to be attended will remain subject to EC's approval. One such 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. Appropriate materials for this purpose shall also be presented in the tender, including their costs, and shall be produced by the selected tenderer.

All dissemination products should be made available to SETIS and CORDIS, which will play the role of an amplifier of the ERKC. The validated data will, after its approval by SETIS, be

disseminated by the selected tenderer in various manners, such as through the ERKC, specialised publications, e-bulletins, events, promotional leaflets and press packages.

Tenders should include proposals on the content and dissemination of the newsletters and press releases, which should both be approved by the SETIS before the ERKC disseminates them. While fully respecting the corresponding legislation, the selected tenderer shall actively search out new contacts and interested parties to be included in the distribution lists of the ERKC dissemination products. Subscription and removal from the distribution list shall be easy.

The selected tenderer shall produce leaflets and/or promotional postcards and/or other promotional materials presenting the ERKC with one or more slogans (e.g. 'bringing energy research together'), which might be inserted into the press packages or conference packages or be attached to invitation letters or be displayed on stands at events or be distributed in any other way. Tenderers shall state such promotional materials and all their costs in the tenders.

The selected tenderer shall produce an advertising banner in order to facilitate the linking from other websites to the ERKC.

The selected tenderer's proposals for the layouts of all publications and of all other materials as well as the contents of all publications and of all other materials must be approved by the SETIS prior to their publication or production.

WP 6: Transfer to SETIS

The selected tenderer must:

- produce complete and user friendly documentation on all the procedures and means used in developing, maintaining and updating the ERKC and
- provide training and information sessions during the last 6 months of the contract to the SETIS staff members in order to enable them to take over all the ERKC activities after the end of the contract.

At the end of the contract, as part of transfer to SETIS, the full contents of the ERKC (including the latest version of the source codes as written for the ERKC during the course of the contract) are to be delivered to the EC on DVDs.

All the costs of all activities related to transfer to SETIS shall be presented in the tenders.

I.4 Deliverables

Execution of the tasks begins after the date on which the contract enters into force.

A kick-off meeting will take place in Brussels at the latest 15 days following the signature of the contract, in order to settle the details of the deliverables.

Deliverables other than reports are described in the previous sections of these tender specifications.

Reports	Delivery date (month after the signature of the contract)
Inception Report	3
1 st Progress Report	6
2 nd Progress Report	12
Interim Technical Report	18
3 th Progress Report	24
4 th Progress Report	30
Draft Final Report	34
Final Report	36

Inception Report

The Inception Report, expected within 3 months after the signature of the contract, will serve as a reference document for the EC and for the selected tenderer during the lifetime of the project. It will contain the detailed management and work programme (including also the communication and dissemination plan as well as proposed structure and content of progress reports and interim, draft final and final technical reports), based on these tender specifications, but will take into account any changes agreed during the finalisation of the contract as well as issues further discussed after the contract signature, in particular during the kick-off meeting. It will elaborate on the proposed data gathering approach and clearly present measurable performance indicators and targets based on them, making it possible to objectively estimate the success of the work done under the contract.

Progress Reports

The Progress Reports will be submitted to the EC 6, 12, 24 and 30 months after the signature of the contract. They will present a full overview of the progress of the work, together with any deviations and corrective actions taken, giving a complete overview and evaluation of the implementation of the contract (including through measurable performance indicators), main achievements, outputs and impacts, users' feedback as well as any problems encountered and also the updated plan of further activities. In addition, they will include an annex providing detailed description of the financial resources used under this contract.

Interim Technical Report

The Interim Technical Report will be submitted to the EC 18 months after the signature of the contract. It will be following the structure of Progress Reports, thus present a full overview of the progress of the work, together with any deviations and corrective actions taken, giving a complete overview and evaluation of the implementation of the contract (including through measurable performance indicators), main achievements, outputs and impacts, users' feedback

as well as any problems encountered and also the updated plan of further activities. In addition, it will include an annex providing detailed description of the financial resources used under this contract.

Draft Final Technical Report

The draft Final Technical Report, mainly following the structure of the Progress Reports, will be submitted to the EC at the latest 34 months after the signature of the contract.

Final Technical Report

The Final Technical Report, mainly following the structure of the Progress Reports and taking into account the EC's comments on the draft Final Technical Report, must be delivered to the EC at the beginning of the last month of the duration of the contract.

Three copies of the abovementioned inception, progress, interim, draft final and final technical reports shall be submitted to the EC in paper form and one copy in electronic form, either in MS Word or in HTML format. The Final Technical Report shall also be submitted to the EC in PDF format. All copies, both in electronic and in paper form, shall be sent to the EC on the same day.

The EC shall have 45 days from receipt to approve or reject any of the abovementioned reports. Based on the EC's response, the selected tenderer shall each time have 20 days in which to submit additional information or a new report.

The quality of the Final Technical Report will be non-exclusively assessed on the basis of the following quality criteria, and rated (poor – satisfactory – good – very good – excellent) according to the following criteria:

1. Relevance: Does the report respond to information needs, in particular as expressed in the tender specifications?
2. Reliable data: Are data collected adequate for their intended use and have their reliability been ascertained?
3. Sound analysis: Are data appropriately analysed to cover the information needs in a valid manner?
4. Helpful recommendations: Are there areas needing further improvements to be done after the end of the contract appropriately addressed in the report?
5. Clarity: Is the report well structured and written in an understandable manner?

The EC may publish the results of the services provided. For this purpose, the selected tenderer must ensure that the information contained in the abovementioned reports and other materials to be published is not subject to any restrictions deriving from personal data, confidentiality or intellectual property rights of third parties. Should the selected tenderer for providing the deliverables or services under this contract intend to use any data which cannot be published, the selected tenderer can only include such data in a separate annex of the abovementioned reports and must clearly mark this annex's cover page as "confidential annex".

I.5 Duration of the tasks

The duration of the tasks shall not exceed 36 months. This period is calculated in calendar days.

I.6 Place of performance

The tasks will be performed on the selected tenderer's premises. However, meetings between the selected tenderer and the EC may be held on EC's premises in Brussels (Belgium) and Petten (The Netherlands) and some work related to the integration of the ERKC into SETIS may also be performed in the EC's premises in Petten (The Netherlands). Some tasks, particularly relating to data gathering and dissemination activities, may also be performed in various Member States as well as in the Associated countries to the Seventh Framework Programme (FP7).

I.7 Estimate of the amount of work involved

The amount of work involved to carry out this contract is assessed at 3500 man days.

II TERMS OF CONTRACT

In drawing up his offer, the tenderer should bear in mind the provisions of the draft contract attached to this invitation to tender (Annex 5). Any limitation, amendment or denial of the terms of contract will lead to automatic exclusion from the procurement procedure.

The Commission may, before the contract is signed, either abandon the procurement procedure or cancel the award procedure without the tenderers being entitled to claim any compensation.

II.1 Terms of Payment

Payments shall be made in accordance with the provisions specified in Annex 5, the draft service contract.

II.2 Financial Guarantees

Guarantee on pre-financing: For any pre-financing higher than 150,000 EUR, a financial guarantee equivalent to the amount of the pre-financing will be requested.

Depending on the financial situation of the tenderer, the Commission may ask for the financial guarantee for amounts lower than 150,000 EUR.

II.3 Subcontracting

If the tenderer intends to subcontract part of the service, he shall indicate in his offer which part will be subcontracted and to what extent (% of the total contract value).

Tenderers must ensure that Article II.17 of the contract (Annex 5) can be applied to subcontractors. Once the contract has been signed, Article II.13 of the above-mentioned contract shall govern the subcontracting.

II.4 Legal Form to Be Taken by the Grouping of Service Providers to Whom the Contract Is Awarded (If Applicable)

Groupings, irrespective of their legal form, may submit bids. Tenderers may, after forming a grouping, submit a joint bid on condition that it complies with the rules of competition. Such 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. If awarded, the contract will be signed by the company or the person heading the project, who will be, vis à vis the Commission, the only contracting party responsible for the performance of this contract. Tenders from a consortium of firms or groups of service providers, contractors or suppliers must specify the role, qualifications and experience of each member of the consortium or group. 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.

III FORM AND CONTENT OF THE TENDER

III.1 General

Tenders must be written in **one of the official languages** of the European Union.

Tenders must be clear and concise, with continuous page numbering, and assembled in a coherent fashion (e.g. bound or stapled, etc...). Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

III.2 Structure of the Tender

All tenders must include three sections i.e. an administrative, a technical and a financial proposal.

III.2.1 Section One: Administrative Proposal

This section must provide the following information, set out in the standard identification forms attached to these tender specifications (Annexes 1, 2 and 3):

Tenderers' identification (Annex 1)

All tenderers must provide proof of **registration**, as prescribed in their country of establishment, on one of the **professional or trade registers** or provide a declaration or certificate.

If the tenderer is a natural person, he/she must provide a copy of the identity card/passport or driving licence and proof that he/she is covered by a social security scheme as a self-employed person.

Each tenderer (including subcontractor(s) or any member of a consortium or grouping) must complete and sign the identification forms in Annex 1 and also provide above-mentioned documents. However, the subcontractor(s) shall not be required to fill in or provide those documents when the services represent less than 20% of the contract.

Financial identification (Annex 2)

The **bank identification form** must be filled in and signed by an authorised representative of the tenderer and his/her banker. A standard form is attached in Annex 2 and a specific form for each Member State is available at the following Internet address:

http://ec.europa.eu/budget/info_contract/ftiers_en.htm

In the case of a grouping, this form must only be provided by the person heading the project.

Legal entities (Annex 3)

The legal entity form in Annex 3 must be filled in and should be accompanied by a number of supporting documents, available on the Web site:

http://ec.europa.eu/budget/info_contract/legal_entities_en.htm

In the case of a grouping, this form must only be provided by the person heading the project.

The Commission reserves the right, however, to request additional evidence in relation to the bid submitted for evaluation or verification purposes within a time-limit stipulated in its request.

III.2.2 Section Two: Technical Proposal

This section is of great importance in the assessment of the bids, the award of the contract and the future execution of any resulting contract.

Some guidelines are given below, but attention is also drawn to the award criteria, which define those parts of the technical proposal to which the tenderers should pay particular attention. The technical proposal should address all matters laid down in the specifications and should include models, examples and technical solutions to problems raised in the specifications. The level of detail of the tender will be extremely important for the evaluation of the tender. Tenderers must present in their bids a proposal on methodology and the organisation of the work to carry out in the framework of the study.

The technical proposal must provide all the information needed for the purpose of awarding the contract. The technical proposal should address all matters laid down in the specifications.

III.2.3 Section Three: Financial Proposal

All tenders must contain a financial proposal. The tenderer's attention is drawn to the following points:

- Prices must be quoted in **euros**, including the countries which are not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.
- Prices must be fixed amounts and include all expenses, such as travel expenses and daily allowances.
- **Prices should be quoted free of all duties, taxes and other charges, i.e. also free of VAT**, as the European Union is exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union of 8 April 1965 (OJ L 152 of 13 July 1967). Exemption is granted to the Commission by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption. For those countries where national

legislation provides an exemption by means of a reimbursement, the amount of VAT is to be shown separately. In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact his or her national authorities to clarify the way in which the European Union is exempt from VAT.

- **Prices shall be** fixed and not subject to revision during the performance of the contract;
- 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;
 - other categories of costs, indicating the nature of the cost, the total amount, the unit price and the quantity.

Bids involving more than one service provider (consortium) must specify the amounts indicated above for each provider.

IV ASSESSMENT AND AWARD OF THE CONTRACT

The assessment will be based on each tenderer's bid.

All the information will be assessed in the light of the criteria set out in these specifications. The procedure for the award of the contract, which will concern only admissible bids, will be carried out in three successive stages.

The aim of each of these stages is:

- 1) To check on the basis of the exclusion criteria, whether tenderers can take part in the tendering procedure;
- 2) to check on the basis of the selection criteria, the technical and professional capacity and economic and financial capacity of each tenderer;
- 3) to assess on the basis of the award criteria each bid which has passed the exclusion and selection stages.

IV.1 Exclusion Criteria (Exclusion of Tenderers)

IV.1.1 Exclusion Criteria (Article 93 Financial Regulation²⁵)

- 1) To be eligible for participating in this contract award procedure, tenderers must not be in any of the following situations:
 - a) They are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
 - b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
 - c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
 - d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;

²⁵ Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities (OJ L 248 of 16.9.2002)

- e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;
 - f) they are currently subject to an administrative penalty referred to in Article 96(1) of the Financial Regulation²⁶ for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in a contract procurement procedure or by the authorising officer as a condition of participation in a grant award procedure, for failing to supply this information or for having been declared to be in serious breach of their obligations under contracts or grants covered by the Union budget.
- 2) The cases referred to in point IV.1.1. e) above shall be the following:
- a) Cases of fraud as referred to in Article 1 of the Convention on the protection of the European Communities' financial interests established by the Council Act of 26 July 1995 (OJ/C 316 of 27.11.1995, p. 48);
 - b) cases of corruption as referred to in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union, established by the Council Act of 26 May 1997 (OJ/C 195 of 25.6.1997, p. 1);
 - c) cases of involvement in a criminal organisation, as defined in Article 2(1) of Joint Action 98/733/JHA of the Council (OJ/L 315 of 29.12.1998, p. 1);
 - d) cases of money laundering as defined in Article 1 of Council Directive 91/308/EEC (OJ/L 166 of 28.6.1991, p.77).

IV.1.2 Other Cases of Exclusion (Article 94 Financial Regulation)

Contracts will not be awarded to tenderers who, during the procurement procedure:

- 1) Are subject to a conflict of interest:

Tenderers must declare:

- a) that they do not have any 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 affinities, family or emotional ties, or any other relevant connection or shared interest;
- b) that they will inform the contracting authority, without delay, of any situation constituting a conflict of interest or which could give rise to a conflict of interest;

²⁶ Council Regulation (EC, Euratom) n° 1605/2002 of 25 June 2002 on the Financial regulation applicable to the general budget of the European Communities, OJ L 248 of 16 September 2002, p. 1, amended by Council Regulation (EC, Euratom) n° 1995/2006 of 13 December 2006, OJ L 390 of 30 December 2006, p.1.

- c) that they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- d) that they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to the award of the contract.

The Commission reserves the right to check the above information.

- 2) **Are guilty of misrepresentation** in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information.
- 3) Find themselves in one of the **situations of exclusion**, referred to in paragraph IV.1.1. above for this procurement procedure.

IV.1.3 Evidence to be provided by the tenderers

- 1) When submitting their bids, each tenderer (including subcontractor(s) or any member of a consortium or grouping) shall provide a declaration on their honour, duly signed and dated, stating that they are not in one of the situations mentioned above (cf. IV.1.1 and VI.1.2). For that purpose, they must complete and sign the form attached in Annex 4. Where the tenderer is a legal entity, they shall, whenever requested by the Commission, provide information on the ownership or on the management, control and power of representation of the legal entity.
- 2) The tenderer to whom the contract is to be awarded shall provide, within 15 calendar days after notification of the results of the procurement procedure and in any case before the signature of the contract, the following evidence, confirming the declaration referred to above:

The Commission shall accept, as satisfactory evidence that the tenderer is not in one of the situations described in point IV.1.1 (a), (b) or (e) above, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.

The Commission accepts, as satisfactory evidence that the tenderer is not in the situation described in point IV.1.1 (d) above, a recent certificate issued by the competent authority of the State concerned.

Where no such document or certificate is 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.

- 3) Depending on the national legislation of the country in which the candidate or tenderer is established, the documents referred to in paragraph 1 and 2 above shall relate to legal and/or natural persons including, if applicable with regard to points b) and e), company directors or any person with powers of representation, decision-making or control in relation to the tenderer.

- 4) When the subcontracted part is above 20% of the contract value, the subcontractor(s) must also provide the above-mentioned declaration on honour. In case of doubt on this declaration on the honour, the contracting authority may also request the evidence referred to in paragraphs 2 and 3 above.
- 5) The Commission reserves the right to request any other document relating to the proposed tender for evaluation and verification purpose, within a delay determined in its request.

Remark: The tenderers will be waived of the obligation to submit the documentary evidence above mentioned if such evidence has already been submitted for the purposes of another procurement procedure launched by the Directorates General in charge of Energy or Transport and provided that the documents are not more than one year old starting from their issuing date and that they are still valid. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure, specifying the reference of the call for tender for which the documents have been provided, and confirm that no changes in his situation have occurred.

IV.1.4 Administrative and Financial Penalties

Without prejudice to the application of penalties laid down in the contract, candidates or tenderers and contractors who have been found guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or have failed to supply this information or have been declared to be in serious breach of their obligations under contracts covered by the Union budget may be subject to administrative or financial penalties, in accordance with Article 96 of the Financial Regulation and Articles 134b and 133a of the Implementing Rules.²⁷

IV.2 Selection Criteria (Selection of Tenderers)

To be eligible, the tenderers must have the economic and financial capacity as well as the technical and professional capacity to perform the tasks required in this call for tender.

IV.2.1 Economic and Financial Capacity – Criteria and References Required

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.

Tenderers must provide proof of their financial and economic capacity by means of the following documents: the balance sheets or extracts from balance sheets for the last three financial years, and a statement of overall turnover and turnover relating to the relevant services for the last three financial years.

²⁷ Commission Regulation (EC, Euratom) n° 2342/2002 of 23 December 2002 laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, OJ L 357 of 31 December 2002, p. 1, as amended.

This rule applies to all service providers, regardless of the percentage of tasks they intend to execute, once they have chosen to submit a tender. However, if the tender includes subcontractors whose tasks represent less than 20% of the contract, those subcontractors are not obliged to provide evidence of their economic and financial capacity.

IV.2.2 Technical and Professional Capacity – Criteria and References Required

Tenderers must demonstrate that all the following requirements are covered by the team proposed:

- Experience of at least 3 years in developing and managing activities (such as website development, data management, communication and dissemination) similar to the ones requested by the tender specifications.
- Experience of at least 3 years in writing English texts for website(s).
- Knowledge of energy research, proven by at least 1 year of experience in the related field.

Evidence of this capacity shall be provided on the basis of the following documents:

- A list detailing the position and tasks for each member of the international team.
- A detailed curriculum vitae (CV) for each member of the international team (including his or her educational background, degrees and diplomas, professional experience including the places of employment, research work, publications and linguistic skills).
- A list briefly summarising the activities similar to the ones requested by the tender specifications, delivered by the tenderer during the last 5 years, with indications of corresponding budgets, recipients and timing (i.e. year or years in which these activities were performed as well as duration of performing of each of these activities). Samples (such as produced communication materials and websites) resulting from such activities may be enclosed.

If several service providers/subcontractors are involved in the bid, each of them must have and show that they have the professional and technical capacity to perform the tasks assigned to them.

The CV's shall be presented, preferably, in accordance to the Commission Recommendation on a common European format for curricula vitae, published in OJ L79 of 22 March 2002, p. 66.

IV.3 Evaluation of Tenders – Award Criteria

The contract will be awarded according to the criteria given below, on the basis of the economically most advantageous tender.

Only bids that have reached a total score of a minimum of 70% and a minimum score of 60% for each criterion will be taken into consideration for awarding the contract.

a) Quality evaluation criteria as weighted by percentage:

Criteria	Maximum score/ weighting
<p>1. Understanding</p> <p>This criterion serves to assess whether the tenderers have fully understood all the aspects of what is required by the tender specifications.</p>	20%
<p>2. Technical quality of the tender</p> <ul style="list-style-type: none"> • Clarity, completeness and full coverage of the tasks; • Quality of proposed methodology and tools for gathering, validating, analysing and presenting information on energy research; • Quality and appropriateness of proposed communication and dissemination activities. 	50%
<p>3. Project management and resources</p> <p>This criterion 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.</p>	30%
Total score	100%

2) Total price

The contract will be awarded to the tender which offers the best ratio quality/price.

IV.4 Information for Tenderers

The Commission will inform tenderers of decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

Upon written request, the Commission will inform the rejected tenderers of the reasons for their rejection and the tenderers having submitted an admissible tender of the characteristics and relative advantages of the selected tender and the name of the successful tenderer.

However, certain information may be withheld where its release would impede law enforcement or otherwise be contrary to the public interest, or would prejudice the legitimate commercial interests of economic operators, public or private, or might prejudice fair competition between them.

V ANNEXES

- 1 Identification of the Tenderer
- 2 Financial Identification
- 3 Legal Entity Form
- 4 Declaration by the Tenderer (relating to the exclusion criteria)
- 5 Draft Service Contract

ANNEX 1

IDENTIFICATION OF THE TENDERER

(Each service provider, including subcontractor(s) or any member of a consortium or grouping, must complete and sign this identification form)

Call for tender No. ENER C2/2010-513-1

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) ²⁸ :	
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): Telephone number: Fax number: E-mail address:	

²⁸ For natural persons.

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 organisation²⁹	
I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

²⁹ This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.

ANNEX 2

FINANCIAL IDENTIFICATION FORM

(to be completed by the tenderer and his or her financial institution)

A specific form for each Member State is available at the following Internet address:
http://ec.europa.eu/budget/info_contract/ftiers_en.htm



FINANCIAL IDENTIFICATION

PRIVACY STATEMENT http://ec.europa.eu/budget/library/execution/privacy_statement_en.pdf

ACCOUNT NAME (3)	
ACCOUNT NAME (1)	<input type="text"/>
	<input type="text"/>
ADDRESS	<input type="text"/>
	<input type="text"/>
TOWN/CITY	<input type="text"/>
POSTCODE	<input type="text"/>
COUNTRY	<input type="text"/>

(1) The name or title under which the account has been opened and not the name of the authorized agent

CONTACT	<input type="text"/>
TELEPHONE	<input type="text"/>
FAX	<input type="text"/>
E - MAIL	<input type="text"/>

BANK	
BANK NAME	<input type="text"/>
	<input type="text"/>
BRANCH ADDRESS	<input type="text"/>
	<input type="text"/>
TOWN/CITY	<input type="text"/>
POSTCODE	<input type="text"/>
COUNTRY	<input type="text"/>
ACCOUNT NUMBER	<input type="text"/>
IBAN (2)	<input type="text"/>

(2) If the IBAN Code (International Bank account number) is applied in the country where your bank is situated

REMARKS :

BANK STAMP + SIGNATURE OF BANK REPRESENTATIVE
(Both obligatory)(3)

DATE + SIGNATURE OF ACCOUNT HOLDER :
(Obligatory)

(3) It is preferable to attach a copy of recent bank statement. Please note that the bank statement has to provide all the information listed above under 'ACCOUNT NAME' and 'BANK'. In this case, the stamp of the bank and the signature of the bank's representative are not required. The signature of the account-holder is obligatory in all cases.

ANNEX 3

LEGAL ENTITY FORM

Complete the legal entity form, which should be accompanied by a number of supporting documents, available on the Web site:

http://ec.europa.eu/budget/info_contract/legal_entities_en.htm

Please note that we can only accept either original documents or certified copies, which must be less than 6 months old.

In the case of a grouping, this form must only be provided by the person heading the project.

ANNEX 4

DECLARATION BY THE TENDERER

Each service provider, including subcontractor(s) or any member of a consortium or grouping, must sign this declaration

- 1) In accordance with Article 93 of the Financial Regulation³⁰, I declare on my honour that I am not in any of the following situations which would exclude me from participating in this procurement procedure:
 - a) I am not bankrupt, being wound up or having my affairs administered by the courts, I have not entered into an arrangement with creditors, I have not suspended business activities, I am not the subject of proceedings concerning any such matters, and I am not in any similar situation arising from a similar procedure provided for in legislation or regulations;
 - b) I have not been convicted of an offence concerning my professional conduct by a judgment which has the force of res judicata;
 - c) I have not been found guilty of grave professional misconduct proven by any means which the contracting authority can justify;
 - d) I have not failed to fulfil obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which I am established or with those of the country or the contracting authority or those of the country where the contract is to be performed;
 - e) I have not been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;
 - f) I am currently not subject to an administrative penalty referred to in Article 96(1) of the Financial Regulation for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in a contract procurement procedure or by the authorising officer as a condition of participation in a grant award procedure, for failing to supply this information or for having been declared to be in serious breach of their obligations under contracts or grants covered by the Union budget.

³⁰ Council Regulation (EC, Euratom) n° 1605/2002 of 25 June 2002 on the Financial regulation applicable to the general budget of the European Communities, OJ L 248 of 16 September 2002, p. 1, amended by Council Regulation (EC, Euratom) n° 1995/2006 of 13 December 2006, OJ L 390 of 30 December 2006, p.1.

- 2) In addition, the undersigned declares on his or her honour:
- a) that on the date of submission of the tender, the company or organisation I do represent and the staff proposed for this tender are not subject to a conflict of interests in the context of this invitation to tender; I undertake to inform the Commission without delay of any change to this situation after the date of submission of the tender.

 - b) that the information provided to the Commission within the context of this invitation to tender is accurate, sincere and complete.

Done at on

Name:

Title:

Signature: