



EUROPEAN COMMISSION

DIRECTORATE-GENERAL

Directorate
Unit

CALL FOR TENDERS

N° ENER/B1/2016-325

FOLLOW-UP ACTIONS TO INCREASE THE AWARENESS OF EXISTING
INSIGHTS AND TOOLS TO IMPROVE STAKEHOLDER ENGAGEMENT
AND PUBLIC ACCEPTANCE OF INFRASTRUCTURE DEVELOPMENT

TENDER SPECIFICATIONS

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1. INFORMATION ON TENDERING

1.1. Participation

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations. It is also open to all natural and legal persons established 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 World Trade Organisation applies, the participation to this procedure is also open to all natural and legal persons established in 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. Compliance with applicable law

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU².

1.4. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact (the leader) for the Contracting Authority for administrative and financial aspects as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

¹ See http://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm

² Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

1.5. Subcontracting

Subcontracting is permitted but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

Tenderers are required to identify subcontractors whose share of the contract is above 20 % and those whose capacity is necessary to fulfil the selection criteria.

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

1.6. Structure and content of the tender

The tenders must be presented as follows:

Part A: Identification of the tenderer (see section 1.7)

Part B: Non-exclusion (see section 4.1)

Part C: Selection (see section 4.2)

Part D: Technical offer

The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

Part E: Financial offer

The maximum contract price is EUR 250.000. Tenders with prices higher than the maximum will be considered unacceptable.

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 bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence).

Part F: Power of attorney (for consortia only)

1.7. Identification of the tenderer

The tender must include a **cover letter** signed by an authorised representative presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney. The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) 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

The tenderer (including each member of the group in case of joint tender) must provide the following information in its tender if it has not been provided with the Legal Entity Form:

- 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 applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.
- For natural persons, if required under applicable law, proof of registration in a professional or trade register or any other official document showing the registration number.

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.

The tenderer (or the leader in case of joint tender) must provide a Financial Identification Form with its supporting documents. Only one form per tender should be submitted. No form is needed for subcontractors and other members of the group in case of joint tender. The form is available on: http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with [Commission Recommendation 2003/361/EC](#). This information is used for statistical purposes only.

2. TECHNICAL SPECIFICATIONS

2.1. Background

The EU's energy infrastructure for electricity is ageing. It is not suited to meet the future energy demand, to ensure secure supply, and to connect and take up the rapidly increasing amounts of renewable energy needed to make energy more sustainable and to lower greenhouse gas emissions. The network bottlenecks prevent citizens and business to benefit from an internal energy market with access to diversified, safe and affordable supplies.

In this new context, Europe's electricity grid will need to undergo a transformation in the coming period to be able to cope with the challenges of an integrated, low carbon energy market. This will require a redesign of the European electricity market as well as major investments.

Therefore Europe needs to invest in a modern, interconnected European energy network to deliver energy for a more sustainable and efficient economy.

It is necessary to make better use of the existing grid, and it is crucial to enable the development of this key infrastructure to become more flexible and integrated at a European level in order to meet evolving energy and environmental needs.

Investments in high-voltage electricity transmission systems will be made at national level through projects of common interest (PCI). PCIs are projects that will aid the interconnectivity of Europe and will be able to benefit from a specially designed fast-tracked permitting system. Preparatory work of identifying potential PCIs allows to initiate a process of early engagement with the public and to facilitate transparency.

Delays in the permit granting, the lack of public acceptance, in particular for new electricity grids and regulatory obstacles at the cross-border cooperation as well as the context of the financial and economic crisis and budget constraints require a new approach on the way Europe manages and finances its networks.

Stakeholder consultation means involving various stakeholders in decision-making processes. One key stakeholder group in the context of decision-making processes is the public at large, and opportunities for public participation are formalised within various levels of legislation. On an international scale, the Convention on Access to Information, Public Participation in Decision Making and Access to Justice in Environmental Matters (the Aarhus Convention) formalises the opportunity for public participation in environmental decision-making processes (including transportation and urban planning) and in decisions that concern proposed legislation, projects (including permits and licences), programmes, policies and plans.

The Regulation on the Guidelines on trans-European energy infrastructure underlines that **major efforts are needed to modernise and expand Europe's energy infrastructure and to interconnect networks across borders to meet the Union's core energy policy objectives of competitiveness, sustainability and security**. Furthermore, it foresees increased transparency and public participation³.

In August 2014, Roland Berger has carried out a study⁴ for the European Commission, which culminated with the launch of an online Grid Infrastructure Communication Toolkit⁵ in an effort to facilitate and inform the stakeholder dialogue necessary to implement European grid development projects with the highest possible level of public acceptance.

Both the toolkit and supporting study were compiled in collaboration with ENTSO-E, eight member TSOs, environmental NGOs and national/regional policy makers.

Despite the good work that has been done to help improve stakeholder communication more effort has to be put into bringing the knowledge to where it is most needed and to continuously increase the awareness of existing insights and tools for a wider public acceptance of infrastructure development.

³ Regulation on the Guidelines on trans-European energy infrastructure (EU) 347/2013 Article 10 – Transparency and Public participation

⁴ https://ec.europa.eu/energy/sites/ener/files/documents/20140618_grid_toolkit_report.pdf

⁵ <https://webgate.ec.europa.eu/multisite/gridcommunicationtoolkit/en>

In the context of a dedicated and well-considered strategy, it is certain that the participation of stakeholders and citizens will improve the overall quality, effectiveness, (cost) efficiency, transparency, acceptance and legitimacy of energy projects.

2.2. Objectives

The long-term objective of this work programme will be to improve public acceptance and understanding of investment needs in the power network by reconnecting people with where power comes from, the role it plays in their lives and explaining the continuing need to provide this infrastructure.

The short term objectives of this project however, are to further define the scope and strategy of an outreach campaign. The tasks envisaged as part of this process of strategy development are outlined in greater detail in the methodology section below.

The contractor shall conduct several activities with an aim of identifying recommendable updates or improvements to the present online Grid Infrastructure Communication Toolkit and also develop additional tools and/or activities to enhance the stakeholders' engagement and the public acceptance of infrastructure projects.

The main objectives are:

1. To update, improve and extend the utility of the toolkit while also conducting a survey among relevant stakeholders in order to identify further recommendable updates and improvements to be taken into consideration.
2. To integrate existing knowledge and tools on grid/electricity storage-related infrastructure communication and to develop a communication campaign that will be tested in one region of a chosen Member State (where public acceptance of infrastructure projects is a major issue) and that can afterwards be used as a best-practice.
3. To produce an audiovisual presentation / animated video presenting the concrete benefits of a well-functioning of the internal energy and the benefits of having Projects of Common Interest implemented in all Member States driving competitiveness for everyone in Europe, to the benefit of citizens and business.
4. To disseminate existing practical experiences, toolkits, communication materials and activities (EU Member State to be identified by the Commission after the signature of the contract).

Target group:

The communication campaign as a whole is designed to reach European citizens and assist project promoters/TSOs in their public consultation activities (required to be conducted in accordance with the Regulation (EU) 347/2013). However, the strategy will need to define more specifically the most important groups and the groups that can be realistically reached by the campaign. The strategy should define target groups in each of the Member States – both in terms of multipliers (i.e. partners that can participate in the campaign or disseminate materials) and the final audience (citizens or specific localities). These will be determined through the process of research and

consultation. Tenderers should outline their approach to researching and defining target groups in different Member States.

2.3. Tasks and Methodology

Task 1: Update, improve and extend the features of the toolkit taking into account stakeholder input

Identify and build a network of alliances with other stakeholders at European and National level (comprising a Steering Committee) that are motivated to engage with the updating of the toolkit, the raising awareness communication campaign and to contribute with ideas to the other objectives set up in the framework of this project.

In order that the future campaign activities are broadly supported, that they utilise synergies with other organisations, and that they don't unnecessarily replicate the efforts of other entities, input from relevant stakeholders at the national and European level will be essential. Building a network of stakeholders is therefore a key aspect of this project that will assist the strategy planning process and set the scene for further stakeholder cooperation when implementing the campaign. Stakeholders will include organisations (from a range of minimum 20 entities up to 50) active in the communication of energy infrastructure in Member State and at European level, including for example; NGOs, energy companies, regulators, business community, consumer associations, journalists, politicians, experts etc.

The tenderer is asked to specify the approach and methodology to working with such stakeholders in a cooperative and results orientated fashion.

We advise the following activities:

- The toolkit should be extended to large-scale electricity storage type of infrastructure (pumped hydro and innovative techniques like compressed air, hydrogen, etc) and updated accordingly.
- Extend the features of the toolkit while also making it more interactive (i.e. graphs, social plug-ins, user generated content, videos, mobile friendly etc.) and by taking into account stakeholder input.
- Stakeholder and country mapping:
 - European project promoters/TSOs are approached to provide names/contacts of organisations which represent most important civil society stakeholders.
 - Via stakeholder interviews: mapping of countries regarding where good practice stakeholder engagement is/is not part of the routines.
 - Identify those countries, where there is an interest in these matters (possibly also only of certain relevant individuals) but little knowledge or experience.
 - Create a database of stakeholders active in this area and document the activities (what and when) they are implementing. This should be a working document, updated throughout the process and a flexible product that can continue to be developed after the project.
 - Set-up a facility – potentially an internet platform – that includes the database of network members that all network participants would have access to – to coordinate and document the activities of this network. This task would require IT expertise.

Task 2: Develop and carry-out a communication campaign

To collate best practice on communication activities and initiate a process of best practice sharing between project promoters as well as other stakeholders involved in communicating the need for electricity infrastructure the consultant should take on an advisory role and help interested parties to develop a strategy and afterwards put in practice a communication campaign for a closer engagement on the ground. One region in a particular Member State should be selected as location for developing this activity which will afterwards serve as best-practice. The decision will be taken within the Steering Committee mentioned in task 1. The campaign will be developed in compliance with the requirements under Regulation (EU) 347/2013 and in particular the Articles 9 and 10 and in close collaboration with the selected project promoter.

The Commission is conscious that a limited budget will mean that this campaign cannot be executed Europe wide in the same way. As part of the submission, Tenderers should indicate a short list of Member States to be further refined to the priority countries during the research phase, and outline the reasoning for this selection. The Contractor should also expect to carry out consultation meetings and/or stakeholders' workshops in each of these priority Member States during the implementation of this project.

Project promoters in different Member States commonly face similar problems of local resistance and the challenge of communicating their messages to local stakeholders or engaging citizens in productive exchange.

Tenderers shall outline their methodology for researching and developing such campaign. Tenderers should also explain their method for presenting best practice information that would allow the information to be shared and used by project promoters.

The Contractor will also be responsible to carry-out a pilot Campaign in a selected Member State by supporting the relevant project promoter.

The Steering Committee will extensively discuss together with the Contractor the objectives, target audiences, messages and resources in order to further design a creative communication strategy for the Campaign, tailored to meet the various objectives pre-identified within the Steering Committee.

The contractor will also be responsible in conceiving communication materials which will aim at promoting the activities locally.

Task 3: Produce an audiovisual presentation / animated video

Social media has revolutionised the way online users communicate with each other, with short, concise statements trumping longer forms of content. Micro-video applications shorten videos to less than ten seconds, making them ideal for sharing on sites like Twitter and Instagram.

In this format, the public can quickly view a message as they scroll through their social media feeds. Custom animated characters, colours and visual elements help you build a personal "brand", getting your audience closer to your.

Visuals are considered more effective than text in marketing is because it leaves impact on the viewers' mind which is an important aspect of raising awareness and better understanding of our policy core goals.

The messages of the campaign should focus on the benefits which investments in modern electricity grids will have on the European and national economies and on citizens' welfare.

Video production deliverables:

- Inception

- Conception
- Script
- Preproduction
- AV material gathering (pictures, video, maps, etc.)
- Production
- Creation and purchase of the assets
- Conception of the presentation

- Post-Production

- Sound design
- Sound mixing
- Delivery of the film/video (approximately 5 minutes of duration), suitable for the large public, the script and the English version of the presentation.

Task 4: Disseminate existing practical experiences, toolkits, communication materials and activities.

- Build network of local actors and organise multi-stakeholder workshops and/or training sessions for single actor groups (grid operators, environmental groups, authorities) to talk about how good stakeholder engagement is being applied elsewhere.

The Commission and relevant stakeholders will provide input to the contractor's research, by providing available data.

2.4. Deliverables

- Database of stakeholders and stakeholder mapping
- Improved, updated and more interactive toolkit
- Communication campaign (e.g. priority Member States) and strategy / sharing facility to be disseminated as best practice for others
- Carry-out the Campaign in close collaboration with the relevant project promoter in the selected Member state
- Summary report of the Communication campaign
- Implementation and budget plan for campaign
- Audiovisual presentation / animated video
- Reports (Interim and final report)
- Toolkit in a printable file format

2.5. Timetable

The duration of execution of the tasks is **11 months**. 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 14 days following the entry into force of the contract, in order to settle all the details of the work to be undertaken.

Timetable and deliverables

When	What
Contract entry into force + 14 days	<ul style="list-style-type: none"> • Kick off meeting • Desk research • Stakeholder • Steering Committee establishment
Month 1	<ul style="list-style-type: none"> • Building of stakeholder database incl. facility to coordinate and document activities • Steering Committee meeting I • Compiling best practice information • Strategy for the Communication Campaign
Month 2	<ul style="list-style-type: none"> • Proposal submission of the strategy and the Terms of Reference for the video / animated video • Proposal for the update, improve and extend the features of the toolkit
Month 3	<ul style="list-style-type: none"> • Interim report • Finalising best practice information • Finalising the network • Building the strategy (incl. options analysis and specification / implementation of a pilot campaign module) • Steering Committee meeting II
Month 4	<ul style="list-style-type: none"> • Finalising the strategy (incl. options analysis) for the Communication Campaign • Finalising the Terms of Reference for the video/ animated video • Update of the toolkit
Month 5	<ul style="list-style-type: none"> • Steering Committee meeting III

Month 7	<ul style="list-style-type: none"> • Completion of the video/animated video • Organising the Communication campaign
Month 9	<ul style="list-style-type: none"> • Communication campaign taking place in the selected country • Draft Final Report :+ 45 days for EC comments + 20 days for finalisation by contractor = Final report
Month 10	<ul style="list-style-type: none"> • Dissemination of practical experiences, toolkits, communication materials and activities
Month 11	<ul style="list-style-type: none"> • Final report • Final meeting • Agreement of next steps

2.6. Ownership and right to use the deliverables

The EC may publish the deliverables or parts thereof. For this purpose, the contractor must ensure that there are no restrictions based on confidentiality and/or intellectual property rights expected from a third party.

2.7. Financial offer

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

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

The maximum budget for this contract is EUR 250,000. Tenders exceeding this amount are to be excluded by the Evaluation Committee.

3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the study and other deliverables as indicated below.

3.1.1. Interim report

The interim report showing progress of the work shall be submitted to the Commission at the latest 3 months after the date of signature of the contract. This report will feed into a mid-way coordination meeting to discuss the progress and direction of the project. It is anticipated that it would be produced following the consultation phase of the project.

The Commission shall have 30 days from receipt to approve or reject the report. Within 20 days of receiving the Commission's observations, the Contractor will submit additional information or another report.

3.1.2. Final report

The contractor will submit a Draft final report incorporating a sum up of activities, results and recommendations to the Commission at the latest 9 months after the signature of the contract.

The Commission shall have forty five days from receipt to approve or reject the final report, and the Contractor shall have 20 days in which to submit additional information and a new final report.

The final report must include:

- an abstract of no more than 200 words and an executive summary of maximum 6 pages, both in English and French;
- The audiovisual presentation / animated video
- The upgraded toolkit (pdf format)
- Follow-up summary of the campaign
- The following disclaimer: *"The information and views set out in this [report/study/article/publication...] are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission's behalf may be held responsible for the use which may be made of the information contained therein."*

3.1.3. Requirements for publication on Internet

The Commission is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility for information providers, see: http://ec.europa.eu/ipg/standards/accessibility/index_en.htm.

For the publishable versions of the study, abstract and executive summary, the contractor must respect the W3C guidelines for accessible pdf documents as provided at: <http://www.w3.org/WAI/>.

3.1.4. Graphic requirements

The contractor must deliver the study and all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at:

http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm

A simple Word template will be provided to the contractor after contract signature. The contractor must fill in the cover page in accordance with the instructions provided in the template. The use of templates for studies is exclusive to European Commission's contractors. No template will be provided to tenderers while preparing their tenders.

The contractor must apply the rules set out in Visual Identity Manual for the graphic design when developing the video (see task 3). The professional font (EC Square Sans Pro) to be used for the study will be made available to the contractor free of charge upon acceptance of the terms and conditions of its use after contract signature. The use of templates for studies is exclusive to European Commission's contractors. No template will be provided to tenderers while preparing their tenders.

4. EVALUATION AND AWARD

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria
- Verification of compliance with the minimum requirements set out in these tender specifications
- Evaluation of tenders on the basis of the award criteria

The contracting authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The tenders will be assessed in the order indicated above. Only tenders meeting the requirements of one step will pass on to the next step.

4.1. Verification of non-exclusion

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

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, subcontractors whose share of the contract is above 20% and those whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The Contracting Authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender to subcontractors whose share of the contract is above 20% and to subcontractors whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.2. Selection criteria

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

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.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

4.2.1. Declaration and evidence

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 2), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see section 4.1) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the evidence to be submitted with the tenders.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.2.2. Regulatory capacity

The objective of this criterion is to ensure that the tenderer is allowed to provide the service. Studies are not subject to particular legal restrictions, unlike e.g. chartered accountants, architects or security guards, so there should be no particular regulatory obligation, only ensuring that the tenderer is registered and can carry out commercial activities.

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders.

4.2.3. Economic and financial capacity criteria

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderer must comply with the following selection criteria.

- **Criterion F1:** Turnover of the last two financial years above 400.000 € for each of the previous financial years; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

Evidence (to be provided on request):

- Copy of the profit and loss accounts for the last two years for which accounts have been closed from each concerned legal entity;

- 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, it may prove its 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. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

4.2.4. Technical and professional capacity criteria and evidence

a. Criteria relating to tenderers

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below. The project references indicated below consist in a list of relevant services provided in the past three years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients.

- **Criterion A1:** The tenderer must prove experience in the field of consulting, communication and public relations, technology services, media relations, audiovisual products as well as in survey technique, data collection, statistical analyses, drafting reports and recommendation papers.

- **Evidence A1:** The tenderer must provide references for at least 2 projects delivered in the field of communication/PR/campaign in the last three years with a minimum value for each project of €50.000.

- **Criterion A2:** The tenderer must prove capacity to work in 2 EU official languages including at least English.

- **Evidence A2:** the tenderer must provide references for 2 projects delivered in the last three years showing the necessary language coverage.

- **Criterion A3:** The tenderer must prove capacity to draft reports in English.

- **Evidence A3:** The tenderer must provide one document of at least 10 pages (report, study, etc.) in this language that it has drafted and published or delivered to a client in the last two years. The verification will be carried out on 5 pages of the document.

a. Criteria relating to the team delivering the service:

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

Evidence will consist in CVs of the team responsible to deliver the service. Each CV should indicate the intended function in the delivery of the service.

B1 – Project Manager: At least 5 years' experience in project management (communication field), including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size and, with experience in management of team of at least 5 people.

Evidence: CV and a language certificate or past relevant experience

B2 – Language quality check: all members of the team should have at least C1 level in English in the Common European Framework for Reference for Languages⁶

⁶ See http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp

Evidence: CV and a language certificate or past relevant experience

B3 – Expert in statistical analysis: Relevant higher education degree or equivalent professional experience and at least 5 years' professional experience in the field of statistical analysis.

Evidence: CV and a language certificate or past relevant experience

B4 – Expert in organising surveys and stakeholders engagement processes: At least 5 years' professional experience and know-how in designing and running fully-integrated communication campaigns and engaging with various stakeholders. In addition to this, it is mandatory to have at least 5 years of professional experience in producing communication products such as: visual identity, graphic design, illustrations, photographs, printing, promotional objects, video reports and clips, animated videos, web sites, mobile applications, interactive games, blogs, and more.

Evidence: CV and a language certificate or past relevant experience;

B5 – Expert in IT development and technology services: At least 5 years of professional experience in the field of software development, website creation and interactive tools.

4.3. Award criteria

The contract will be awarded based on the most economically advantageous tender, according to the 'best price-quality ratio' award method. 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** (70 points – minimum score 60%)

This criterion will assess how the tenderer plans to address the specifications and the requested services and whether the proposed methodology is sound and reliable in terms of delivering the expected results. The evaluation will take into account (i) the proposal's clarity and completeness and full coverage of the tasks described in the tender specifications; (ii) the proposed methodology for accessing, collection and processing of data in line with the task requirements; (iii) the proposed methodology for data validation and analysis in line with the task requirements; (iv) the overall quality and appropriateness of the methodology for delivering the expected results.

It will also assess the proposed methodology for the presentation of results and completeness of reporting in line with the task requirements. The evaluation will take into account the proposed approach for elaboration of (i) an improved toolkit; (ii) a stakeholder mapping and a communication campaign's strategy; (iii) an animated video.

- **Organisation of the work and resources** (20 points – minimum score 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. Details should be provided as part of the technical offer. It is not a budget requested as part of the financial offer.

- **Quality control measures** (10 points – minimum score 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 minimum 60% for each criterion and minimum 70 % in total. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

4.4. Ranking of tenders

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below. A weight of 70/30 is given to quality and price.

score for tender X	=	cheapest price	*	100	*	price weighting (30 %)	+	total quality score (out of 100) for all award criteria of tender X	*	quality criteria weighting (70 %)
		price of tender X								

5. ANNEXES

1. Tenderer 's Identification Form
2. Declaration of honour on exclusion criteria and selection criteria
3. Power of attorney (mandate in case of joint tender)
4. Standard Word template for studies
5. Draft Contract or purchase order

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 tenders MOVE/ENER/SRD xx/xxxx-xx

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) ⁷	
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):	

⁷ 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 organisation⁸ I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

⁸ 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 selection criteria

The undersigned [*insert name of the signatory of this form*], representing:

<i>(only for natural persons)</i> himself or herself	<i>(only for legal persons)</i> the following legal person:
ID or passport number:	Full official name: Official legal form: Statutory registration number: Full official address: VAT registration number:

➤ declares whether the above-mentioned person is in one of the following situations or not:		
SITUATION OF EXCLUSION CONCERNING THE PERSON	YES	NO
a) it is bankrupt, subject to insolvency or winding up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under national legislation or regulations;	<input type="checkbox"/>	<input type="checkbox"/>
b) it has been established by a final judgement or a final administrative decision that the person is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the law of the country in which it is established, with those of the country in which the contracting authority is located or those of the country of the performance of the contract;	<input type="checkbox"/>	<input type="checkbox"/>
c) it has been established by a final judgement or a final administrative decision that the person is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the person belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibility where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:		
(i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of selection criteria or in the performance of a contract;	<input type="checkbox"/>	<input type="checkbox"/>
(ii) entering into agreement with other persons with the aim of distorting competition;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) violating intellectual property rights;	<input type="checkbox"/>	<input type="checkbox"/>
(iv) attempting to influence the decision-making process of the contracting authority during the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
(v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
d) it has been established by a final judgement that the person is guilty of any of the following:		

(i) fraud, within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995;	<input type="checkbox"/>	<input type="checkbox"/>
(ii) corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of EU Member States, drawn up by the Council Act of 26 May 1997, and in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the legal provisions of the country where the contracting authority is located, the country in which the person is established or the country of the performance of the contract;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) participation in a criminal organisation, as defined in Article 2 of Council Framework Decision 2008/841/JHA;	<input type="checkbox"/>	<input type="checkbox"/>
iv) money laundering or terrorist financing, as defined in Article 1 of Directive 2005/60/EC of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
(v) terrorist-related offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision;	<input type="checkbox"/>	<input type="checkbox"/>
(vi) child labour or other forms of trafficking in human beings as defined in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
e) the person has shown significant deficiencies in complying with the main obligations in the performance of a contract financed by the Union's budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by an Authorising Officer, OLAF or the Court of Auditors;	<input type="checkbox"/>	<input type="checkbox"/>
f) it has been established by a final judgment or final administrative decision that the person has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;	<input type="checkbox"/>	<input type="checkbox"/>
g) for the situations of grave professional misconduct, fraud, corruption, other criminal offences, significant deficiencies in the performance of the contract or irregularity, the applicant is subject to: <ul style="list-style-type: none"> i. facts established in the context of audits or investigations carried out by the Court of Auditors, OLAF or internal audit, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body; ii. non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics; iii. decisions of the ECB, the EIB, the European Investment Fund or international organisations; iv. decisions of the Commission relating to the infringement of the Union's competition rules or of a national competent authority relating to the infringement of Union or national competition law; or v. decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body. 	<input type="checkbox"/>	<input type="checkbox"/>

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[Only for legal persons other than Member States and local authorities, otherwise delete this table]

- declares whether a natural person who is a member of the administrative, management or supervisory body of the above-mentioned legal person, or who has powers of representation, decision or control with regard to the above-mentioned legal person (this covers the company directors, members of the management or supervisory bodies, and cases where one natural person holds a majority of shares) is in one of the following situations or not:

SITUATIONS OF EXCLUSION CONCERNING NATURAL PERSONS WITH POWER OF REPRESENTATION, DECISION-MAKING OR CONTROL OVER THE LEGAL PERSON	YES	NO
Situation (c) above (grave professional misconduct)	<input type="checkbox"/>	<input type="checkbox"/>
Situation (d) above (fraud, corruption or other criminal offence)	<input type="checkbox"/>	<input type="checkbox"/>
Situation (e) above (significant deficiencies in performance of a contract)	<input type="checkbox"/>	<input type="checkbox"/>
Situation (f) above (irregularity)	<input type="checkbox"/>	<input type="checkbox"/>

- declares whether a natural or legal person that assumes unlimited liability for the debts of the above-mentioned legal person is in one of the following situations or not:

SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS ASSUMING UNLIMITED LIABILITY FOR THE DEBTS OF THE LEGAL PERSON	YES	NO	N/A
Situation (a) above (bankruptcy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (b) above (breach in payment of taxes or social security contributions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- declares whether the above-mentioned person is in one of the following situations or not:

GROUND FOR REJECTION FROM THIS PROCEDURE	YES	NO
h) has not distorted competition by being previously involved in the preparation of procurement documents for this procurement procedure;	<input type="checkbox"/>	<input type="checkbox"/>
i) has provided accurate, sincere and complete information to the contracting authority within the context of this procurement procedure;	<input type="checkbox"/>	<input type="checkbox"/>
➤ acknowledges that the above-mentioned person may be subject to rejection from this procedure and to administrative sanctions (exclusion or financial penalty) if any of the declarations or information provided as a condition for participating in this procedure prove to be false.		

REMEDIAL MEASURES

If the person declares one of the situations of exclusion listed above, it should indicate the measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. They may include e.g. technical, organisational and personnel measures to prevent further occurrence,

compensation of damage or payment of fines. The relevant documentary evidence which appropriately illustrates the remedial measures taken should be provided in annex to this declaration. This does not apply for the situations referred in point (d) of this declaration.

EVIDENCE UPON REQUEST

Upon request and within the time limit set by the contracting authority the person shall provide information on the persons that are members of the administrative, management or supervisory body, as well as the following evidence concerning the person or the natural or legal persons which assume unlimited liability for the debt of the person:

For situations described in (a), (c), (d) or (f), production of a recent extract from the judicial record is required or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of establishment of the person showing that those requirements are satisfied.

For the situation described in point (a) or (b), production of recent certificates 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 person is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions. Where any document described above is not issued in the country concerned, it may be replaced by a sworn statement made before a judicial authority or notary or, failing that, a solemn statement made before an administrative authority or a qualified professional body in its country of establishment.

If the person already submitted such evidence for the purpose of another procedure, its issuing date does not exceed one year and it is still valid, the person shall declare on its honour that the documentary evidence has already been provided and confirm that no changes have occurred in its situation.

➤ declares whether the above-mentioned person complies with the selection criteria as provided in the tender specifications:		
SELECTION CRITERIA	YES	NO
(a) It has the legal and regulatory capacity to pursue the professional activity needed for performing the contract as required in section [<i>insert</i>] of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>
(b) It fulfills the applicable economic and financial criteria indicated in section [<i>insert</i>] of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>
(c) It fulfills the applicable technical and professional criteria indicated in section [<i>insert</i>] of the tender specifications.	<input type="checkbox"/>	<input type="checkbox"/>
➤ declares that the above-mentioned person will be able to provide the necessary supporting documents listed in the relevant sections of the tender specifications and which are not available electronically upon request and without delay.		

Full name

Date

Signature

ANNEX 3

POWER OF ATTORNEY

mandating one of the partners in a joint tender as lead partner and lead contractor⁹

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:

⁹ To be filled in and signed by each partner in a joint tender except the lead partner.

ANNEX 4
Standard Word template for studies

ANNEX 5
DRAFT CONTRACT

Please see separate document