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DIRECTORATE-GENERAL FOR ENERGY
Directorate C
Unit C1 Renewables and CSS policy

CALL FOR TENDERS

N° ENER C1 2019-481

**“Potentials and levels for the electrification of space
heating in buildings”**

TENDER SPECIFICATIONS

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6. ANNEXES 24

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 550.000 EUR. 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). Travel and subsistence expenses are not refundable separately.

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.

In addition the tenderer must fill and sign Annex I (identification of the Tenderer) and join it to the tender.

2. TECHNICAL SPECIFICATIONS

2.1. Background

The revised Renewable Energy Directive (the Directive) adopted under the Clean Energy for All Europeans package provides for mainstreaming renewable energy sources in the EU heating and cooling sector setting a general indicative target of 1.3 percentage point annual average increase in renewables in the period of 2021-2030 and an at least 1 percentage point sub-target for district heating and cooling. Beyond 2030, the EU is committed to decarbonise the energy sector, including heating and cooling by 2050 in accordance with the 2015 Paris Agreement. Accordingly, in its communication “*A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy*” (EU Long-term decarbonisation strategy) the Commission examined economy-wide decarbonisation scenarios covering also buildings and industry, where most heating and cooling take place.

Heating and cooling accounts for 50% of the EU final and primary energy consumption. Around 75% of heating production is based on fossil fuels; only around 20% is renewable, mostly based on biomass, which is currently the main renewable heating source. Consumption and production is mostly inefficient. Three quarters of buildings are inefficient, having been built before energy performance requirements were implemented. Industry also has significant energy saving potentials, while around 50% of the supply of heat is produced by old, inefficient equipment, mostly beyond their technical lifetime. The sector is characterised by high level of heterogeneity with many small actors at local and national levels, diversity in supply modes, technologies and energy sources defined by different climate and geographical conditions, historical energy supply, infrastructure and equipment stock conditions. The production and consumption is decentralised taking place in millions of buildings, business facilities and industrial plants.

Due to the diverse and local nature of heating, and the structure of consumption and production, heating is difficult to decarbonise. While mature and proven technologies and solutions for heat decarbonisation do exist and are available on the market, their market take-up is limited and slow due to the importance of and need for supportive policy and regulatory frameworks at national, regional and local levels. The size of the heating market, representing around 500 Mtoe or half of the EU energy consumption adds to the challenges, given that solutions that are cost-effective and affordable for all need to be deployed at a mass scale to replace the large amount of fossil fuels in use today.

Electrification of heating has been proposed as the main solution for heat decarbonisation by various studies and scenarios. The EU Long-term decarbonisation strategy analysed 8 scenarios that projected to between around 22% and 44% electrification of heating in the residential sector and between around 44% and 66% electrification in the services sector. Electrification would also play important role in decarbonising industry, especially in the Long-term strategy' electrification scenario. Other scenarios have proposed even higher level of electrification of heating in building, such as 74% (Schell Sky scenario) and between 45% and 63% electrification was proposed by the electricity industry depending on the level of greenhouse gas reduction (80% or 95%).

2.2. Objective

Due to the importance of fully decarbonising heating by 2050, the present study's objective is to analyse the possible levels of electrification of heating, the related need for renewable electricity production, and investment in renewable electricity capacities and electricity grid infrastructures, building upgrades and changes in heating equipment. It will examine the impact on the electricity system, the costs of these investments and of the heating supply from electricity, as well as the legal and regulatory framework that is conducive to it. The study will cover both direct electrification via renewable electricity and indirect electrification via hydrogen and e-fuels produced from renewable electricity, and propose cost-effective levels of those in comparison with possible renewable alternatives.

2.3. Tasks

Task 1: Analyse various levels of direct electrification of heating and establish the quantified need for additional generation and grid capacities, electric heating appliance capacities, building refurbishment levels and their costs

Under Task 1, the contractor will model and analyse the impact of supplying 80%, 60%, 40% and 30% of heating in buildings from renewable electricity directly covering space heating and sanitary hot water production. The contractor will propose adequate methodological approach to do quantitative and qualitative analysis and provide explanatory description of the results. The model should be able to analyse daily and seasonal demand and supply patterns, preferably in hourly resolution, and establish peak, average and minimum heating demands and matching electricity supply in a yearly timeframe.

The contractor will model trajectories to reach 80%, 60%, 40% and 30% shares of renewable electricity in renewable heating supply by 2050.

Based on the modelling and other analytical tools (quantitative and qualitative), as necessary, the contractor will have to provide at least the following outputs:

- a) The additional renewable electricity production and capacity needed to cover 80%, 60%, 40% and 30% of heat demand;
- b) The source of the additional renewable production and type of capacity (wind, solar, other) and the geographical location in Europe, as well as its centralised or decentralised nature;
- c) The additional electricity grid capacity at transmission and distribution levels and the impact on cross-border interconnection capacities;
- d) The additional electric heating appliance capacity to be installed in buildings and district heating systems, in particular additional heat pump capacity by types (e.g. ground source

- and geothermal, air source) and other electric heating capacities (e.g. direct resistance heating, electric boiler);
- e) The required level of refurbishment in buildings to adapt the energy performance of the building shell and heating systems to electric heating;
 - f) The costs of each components from a) to e) individually, detailing capital investment costs, operation and maintenance costs, and the total sum of the costs of all components a)-e).
 - g) The cost reduction potentials from thermal storage and demand side measures to provide flexibility enabling the use of excess variable renewable electricity production (wind and solar) and the related investment in smart technologies at the electricity grid, buildings, district heating and individual heating appliances levels, and the investment costs of those additional smart technologies;
 - h) The costs to consumers and identification of the actors who would/should bear the investment costs;
 - i) Energy consumption impacts, primary and final energy efficiency impacts, energy savings or additional energy consumption, energy system costs impacts, greenhouse gas reduction impacts and other environmental impacts.

The geographical coverage is the EU and its Member States. The timeframe is until at least 2050. The outputs from a) to i) should be provided for the EU as a whole and for each Member States. The contractor will be closely familiar with electricity systems, their modelling, electricity infrastructure planning and costs, including relevant work done by ENTSO-E, ACER and national TSOs and DSO across the EU Member States in order to obtain information on the source, the geographical location and the amount of the needed renewable electricity generation and capacity, the possible amount of export and import, the electricity grid reinforcement needs and costs at transmission and distribution level at EU and Member States level.

The contractor will provide four scenarios for 80%, 60%, 40% and 30% of heating electrification, respectively, and a common baseline scenario. The four direct electrification levels' scenarios should also inform about the suitable complementary technologies that together with renewable electricity cover the entire heat demand in buildings, as well as their costs and advantages in the given scenarios. The costs of direct electric heating (e.g. via heat pumps) will be comparatively evaluated against the costs of alternatives, i.e. other renewable technologies and conventional fossil technologies, as well as against the baseline scenario. The contractor may propose variants for the four scenarios to reflect different options in realising these scenarios such as different sources and regions for renewable electricity production, different proportion of centralised versus decentralised electricity production, different proportions of individual and district heating. The exact scenarios and eventual variants (up to two variants) will be agreed with the European Commission.

Task 2: Analyse various levels of indirect electrification of heating through renewable hydrogen and establish the quantified need for additional renewable electricity generation and electricity grid capacities, electrolysers' and hydrogen production capacities, adapted hydrogen transport infrastructures and storage capacities and adapted heating appliance capacities in buildings and building refurbishment levels, and the related costs of these investment

Under Task 2, the contractor will model and analyse the impact of supplying 80%, 60%, 40% and 20% of heating in buildings from renewable hydrogen produced from renewable electricity, covering space heating and sanitary hot water production. The contractor will propose adequate methodological approach to do quantitative and qualitative analysis and will provide explanatory description of the results. The model should be able to analyse daily and seasonal demand and

supply patterns, preferably in hourly resolution, and establish peak, average and minimum heating demands and matching electricity supply in a yearly timeframe.

The contractor will model trajectories to reach 80%, 60%, 40% and 20% of renewable hydrogen supply by 2050.

Based on the modelling and other analytical tools (quantitative and qualitative), as necessary, the contractor will have to provide at least the following outputs:

- a) The additional renewable electricity production and capacity needed to cover 80%, 60%, 40% and 20% of heat demand from renewable hydrogen produced from renewable electricity;
- b) The source of the additional renewable production and type of capacity (wind, solar, other) and the geographical location in Europe, as well as its centralised or decentralised nature;
- c) The additional electricity grid capacity at transmission and distribution levels and the impact on cross-border interconnection capacities;
- d) The quantity of renewable hydrogen needed and the evolution of its production costs and the input parameters (such as water);
- e) The quantity of hydrogen production and hydrolyser capacities needed, the evolution of their roll-out and costs;
- f) The hydrogen transport capacities and hydrogen storage capacities needed, the evolution of their costs and to what extent if any, existing gas networks can be used;
- g) The adapted heating appliance capacity to be installed in buildings and in district heating systems, including hydrogen distribution systems in buildings and district heating systems, and the type of heating appliances that can be used;
- h) The required level of refurbishment in buildings to adapt the energy performance of the building envelope and the technical heating systems to hydrogen heating;
- i) The costs of each components from a) to h) individually, detailing capital investment costs, operation and maintenance costs, and the total sum of the costs of all components under a)-h);
- j) The interaction with and cost reduction potentials from interacting with other flexibility sources, such as other type of energy storage and demand side measures enabling the use of excess variable renewable electricity production (wind and solar) and the related investment in smart technologies in the electricity grid, buildings, district heating and individual heating appliances, and the investment costs of those additional smart technologies;
- k) The costs to consumers and identification of the actors who would/should bear the investment costs;
- l) Energy consumption impacts, primary and final energy efficiency, energy savings or additional energy consumption, energy system costs impacts, greenhouse gas reduction impacts, and other environmental impacts.

The geographical coverage is the EU and its Member States. The timeframe is until at least 2050. The outputs from a) to l) should be provided for the EU as a whole and for each Member States. For obtaining the EU and Member States information on the source, the geographical location and the amount of the needed renewable electricity generation and capacity, the possible amount of export and import, the electricity grid reinforcement needs and costs at transmission and distribution level, the contractor will be closely familiar with electricity systems, their modelling, electricity infrastructure planning and costs, including relevant work done by ENTSO-E, ACER and national TSOs and DSO across the EU Member States.

The contractor will provide four scenarios for 80%, 60%, 40% and 20% heating from renewable hydrogen scenarios, respectively and a common baseline scenario. The four indirect electrification levels' scenarios from hydrogen should also inform about the suitable complementary technologies that together with direct renewable electricity cover the entire heat demand in buildings, as well as their costs and advantages in the given scenarios. The costs of renewable hydrogen heating will be comparatively evaluated against the costs of alternatives, i.e. other renewable technologies, such as direct electrification, and conventional fossil technologies, as well as against the baseline scenario. The contractor may propose variants for the four scenarios to reflect different options in realising these scenarios such as different sources and regions for renewable electricity production, different proportion of centralised versus decentralised electricity production, different proportions of individual and district heating. The exact scenarios and eventual variants (up to two variants) will be agreed with the European Commission.

Task 3: Analyse various levels of indirect electrification of heating through the supply of heating from synthetic methane (e-gas) and synthetic e-liquids produced from renewable electricity (through green hydrogen, methanation, etc.), establish the quantified need for additional renewable electricity generation and electricity grid capacities, electrolyzers' and hydrogen production capacities, methanation capacities, feedstock (e.g. CO₂), adapted transport infrastructures and storage capacities (e.g. CO₂ storage and transport, hydrogen transport, adaptation of existing gas networks) and adapted heating appliance capacities in buildings and building refurbishment levels, and the related costs of these investments

Under Task 3, the contractor will model and analyse the impact of supplying 80%, 60%, 40% and 20% of heating in buildings from synthetic e-gases produced from renewable electricity, covering space heating and sanitary hot water production. The contractor will propose adequate methodological approach to do quantitative and qualitative analysis and will provide explanatory description of the results. The model should be able to analyse daily and seasonal demand and supply patterns, preferably in hourly resolution, and establish peak, average and minimum heating demands and matching electricity supply in a yearly timeframe.

The contractor will model trajectories to supply 80%, 60%, 40% and 20% of heating from synthetic e-gases and e-liquids produced from renewable electricity by 2050.

Based on the modelling and other analytical tools (quantitative and qualitative), as necessary, the contractor will have to provide at least the following outputs:

- a) The additional renewable electricity production and capacity needed to produce the synthetic e-gas and e-liquids needed to cover 80%, 60%, 40% and 20% supply of heating from buildings;
- b) The source of the additional renewable production and type of capacity (wind, solar, other) and the geographical location in Europe, as well as its centralised or decentralised nature;
- c) The additional electricity grid capacity at transmission and distribution levels and the impact on cross-border interconnection capacities;
- d) The quantity of synthetic e-gas and e-liquids needed and the evolution of its production costs and of the input parameters, such as quantity of hydrogen and CO₂ input, other inputs, the quantity of water, etc. needed;
- e) The quantity of hydrogen production and hydrolyser capacities needed, the evolution of their roll-out and costs;
- f) The quantity of CO₂ and other feedstock needed, as appropriate;

- g) The hydrogen transport capacity needed and hydrogen storage capacities needed, the evolution of their costs and to what extent if any, existing gas networks can be used;
- h) The CO₂ supply, transport and storage capacity needed, the evolution of their costs and the likely geographical distribution, as well as the possibilities of CO₂ supply and transport optimisation;
- i) The extent to which existing gas networks can be used and their needed adaptation;
- j) The extent to which existing heating oil distribution networks can be used and their need for adaptation;
- k) The extent to which existing heating appliances can be used, the replacement capacities needed to be installed in buildings and in district heating systems, the type of heating appliances that can be used;
- l) The required level of refurbishment in buildings to adapt the energy performance of the building envelope and the technical heating systems;
- m) The costs of each components from a) to l) individually, detailing capital investment costs, operation and maintenance costs, and the total sum of the costs of all components a)-l).
- n) The interaction with and cost reduction potentials from interacting with other flexibility sources, such as other type of energy storage, demand side measures enabling the use of excess variable renewable electricity production (wind and solar) and the related investment in smart technologies at the electricity grid, buildings, district heating and individual heating appliances levels, and the investment costs of those additional smart technologies;
- o) The costs to consumers and identification of the actors who would/should bear the investment costs;
- p) Energy consumption impacts, primary and final energy efficiency, energy savings or additional energy consumption impacts, energy system costs impacts, greenhouse gas reduction impacts and other environmental impacts.

The geographical coverage is the EU and its Member States. The timeframe is until at least 2050. The outputs from a) to p) should be provided for the EU as a whole and for each Member State. For obtaining the EU and Member States information on the source, the geographical location and the amount of the needed renewable electricity generation and capacity, the possible amount of export and import, the electricity grid reinforcement needs and costs at transmission and distribution level, the contractor will be closely familiar with electricity systems, their modelling, electricity infrastructure planning and costs, including relevant work done by ENTSO-E, ACER and national TSOs and DSO across the EU Member States.

The contractor will provide six scenarios for 80%, 60%, 40% and 20% heating from mainly synthetic e-gas and two scenarios for a mix of e-gases and e-liquids (the latter two are to be defined in agreement with the Commission), and a common baseline scenario. The six indirect electrification levels' scenarios from e-gases and e-liquids should also inform about the suitable complementary technologies that together with direct renewable electricity and other renewable heating technologies cover the entire heat demand in buildings, as well as their costs and advantages in the given scenarios. The costs of synthetic e-gas and e-liquid heating will be comparatively evaluated against the costs of alternatives, i.e. other renewable technologies, including direct electrification, and conventional fossil technologies, as well as against the baseline scenario. The contractor may propose variants for the six scenarios to reflect different proportions of e-gases and e-liquids in the mix in realising these scenarios, different proportion of centralised versus decentralised electricity production, different proportions of individual and district heating. The exact scenarios and eventual variants (up to two variants) will be agreed with the European Commission.

Task 4: Recommendations for the level of deployment of direct electric heating (in particular heat pumps), renewable hydrogen and synthetic e-gases and e-liquids in the heating of buildings and the supportive framework policies and measures

Sub-task 4.1: Comparison of the scenarios and recommendations for the cost-effective level of electrification and technology mix

Based on Task 1-3, the contractor will evaluate the scenario results, the cost-benefits of various levels of deployment of direct and indirect electrification in heating compared to each other and alternative technologies. The contractor will take into account the modelling results and analysis under Tasks 1-3, additional quantitative and qualitative analyses, as required, and literature reviews, including the comparative data on renewable heating technologies, their costs, including levelised cost of heating (LCOH), potentials and scenarios. The contractor will make reasoned recommendations for the cost-effective level of deployment of direct electric heating, renewable hydrogen and synthetic gases and liquids. The contractor will develop the evaluation parameters to identify a cost-effective level of deployment in agreement with the Commission.

Sub-task 4.2: Analysis of the barriers to and the measures needed to realise the recommended cost-effective scenario

Based on sub-task 4.1, the contractor will analyse the barriers to the recommended level of direct and indirect electrification of heating and provide recommendations for the measures and policies. For the recommendations of the measures and policies, the tenderer will consider whether and how those can be integrated in the recast Renewable Energy Directive (Article 23 and 24) and other relevant Clean Energy Package legislation, and how to ensure seamless continuation for the post-2030 period by at least 2050. The recommendations will take into account a comprehensive literature review on the decarbonisation of heating and cooling, including literature recommended by the Commission.

The recommendations will cover calculation methods for the share of renewable heating from renewable electricity, from renewable hydrogen and from synthetic e-gases and e-liquids in the frame of the 1,3 percentage point annual increase target under Article 23 of the recast Renewable Energy Directive and the 1 percentage point annual increase target under Article 24 of the recast Renewable Energy Directive. The contractor will also consider statistical reporting methods for these renewable fuels for heating in order to integrate them into the Eurostat renewable energy reporting and other relevant Eurostat statistics.

Task 5: Organise a Stakeholder Consultation Workshop and Present the work to Member States

Task 5.1: Public stakeholder workshop (industry associations, NGOs, researchers, scientists, other stakeholders)

The contractor will organise a workshop and present the results of Tasks 1-4 to relevant stakeholders in Brussels. The Commission will provide the venue. Participation in the workshop is at the charge of the participants; neither the European Commission nor the contractor will cover participation fees or any related travel and accommodation charges.

The contractor will establish the list of invitees, provide the meeting documents and presentations and the agenda in agreement with the European Commission. The contractor will draft the minutes and the proceedings and incorporate the results of the workshop into its final deliverables. The workshop should take place based on the deliverables prepared under Tasks 1-

3, and before the finalisation of Task 4 in agreement with European Commission. The time of the stakeholder workshop will be established in agreement with the European Commission.

The contractor will provide the draft materials for public consultation (questions and explanations to the questions) to be finalised in agreement with the European Commission.

The materials of the workshop (at least the agenda, minutes and proceedings and questions) will be integrated into the final report in annex.

Task 5.2: Presentation to countries in Working Groups set up by Directorate General for Energy and the Statistical Working Group set up by Eurostat.

The contractor will present the work, including Tasks 1-4, in meetings with Member States' representatives. Up to four meetings, for one or two hours in one meeting should be foreseen. These meetings may include meetings with the Eurostat Statistical Working Group taking place in Luxembourg. The number of participants from the contractor should not exceed 4 persons. The contractor will be responsible for taking the minutes of the meetings. The date and time of the meetings will be established in agreement with the European Commission.

The duration of the tasks shall not exceed **20 months**. This period is calculated in calendar days.

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

In principle, the deadlines set out below cannot be extended. The Contractor is deemed solely responsible for delays occasioned by subcontractors or other third parties (except for rare cases of *force majeure*). Adequate resources and appropriate organisation of the work including management of potential delays should be put in place in order to observe the timetable below.

A **kick-off meeting** will take place in Brussels, at the latest **30 days** following the entry into force of the contract, in order to settle all the details of the work to be undertaken.

The **first interim report** providing the draft deliverables under Task 1 and preliminary draft deliverable under Tasks 2-3 shall be provided at the latest **5 months** following the entry into force of the contract. A first interim payment is linked to this interim report.

Following the submission of the first draft interim report, a **first progress meeting** will be organised in Brussels to discuss the Commission's observation. The exact date will be agreed upon with the Contractor.

The **second interim report** providing draft final deliverables under Task 1 and the draft deliverables under Task 2 and Task 3 shall be provided at the latest **10 months** following the entry into force of the contract.

The **third interim report** providing the final deliverables under Task 1-3 and the draft deliverables under Task 4 will be provided at the latest **15 months** following the entry into force of the contract. A second interim payment is linked to this interim report.

Following the submission of the third draft interim report, a **second progress meeting** will be organised in Brussels to discuss the Commission's observation. The exact date will be agreed upon with the Contractor.

The **stakeholder workshop** shall be organised at the latest **16 months** following the entry into force of the contract.

The **draft final report** integrating the Commission comments and providing all deliverables under Tasks 1-5 shall be provided at the latest **19 months** after the entry into force of the contract.

Following the submission of the draft final report, the Commission may request a **final meeting** to be organised in Brussels to discuss the Commission's observation. The exact date of such final meeting will be agreed upon with the Contractor.

The Intellectual property rights of the modelling data, the presentations and the study belong to the European Commission.

3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the study following the structure of the deliverables under the tasks. The public consultation materials and the workshop proceedings should be annexes of the study. The presentations and data should be provided in electronic files (ppt and excel).

3.1. Content

3.1.1. Final study report

The final study report must include:

- an abstract of no more than 200 words and an executive summary of maximum 6 pages in English;
- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- 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.”

3.1.2. Publishable executive summary

The publishable executive summary must be provided in English and must include:

- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- 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/>.

3.2. Structure

The study's final report should organise the chapters according to the deliverables under the Tasks 1-4.

3.3. 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.

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 Contracting Authority will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

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, identified subcontractors must provide a declaration on honour signed by an authorised representative.

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, and to identified subcontractors.

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.

For the selection criteria, the Contracting Authority will evaluate:

- Economical and financial capacity criteria on the basis of the evidence uploaded in the "Participant Register of the Participant Portal"
- Technical and professional capacity 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. 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:** Annual turnover of the last two financial years above EUR 500.000,00; this criterion applies to the leader in case of a joint tender.

Evidence F1: a statement on the annual turnover for the last two years for which accounts have been closed from each concerned legal entity;

- **Criterion F2:** The tenderer must have a professional risk indemnity insurance of at least EUR 500.000,00; this criterion applies to the leader in case of a joint tender.

Evidence F2: a copy of the professional risk indemnity insurance

4.2.3. 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 cumulatively in the field of:

- Space heating technologies, in particular heat pumps and direct electric heating, the use of hydrogen and e-fuels for heating, and knowledge of district heating systems; the technical parameters and business operation of these space heating methods;
- Renewable electricity generation technologies; emerging renewable hydrogen and e-fuels technologies, including their production paths and costs;
- Renewable energy sources relevant for space heating systems, including wind, solar and ambient energy (aerothermal, hydrothermal);
- Energy system modelling; especially modelling of the electricity system and grids at EU and Member States level, and the modelling of the EU and national heating systems; modelling the interactions between the electricity and heating systems;
- Heating technical systems in buildings and energy performance of buildings;
- European energy and climate policies and legislation, especially related to renewable energy, the internal market for electricity (generation, transmission and distribution system operation, grid planning at EU and national levels and interconnection regulation), Energy Performance of Buildings and energy efficiency, environmental sustainability in relation to energy sources and production methods;
- Data collection methods and European energy statistics;
- Drafting of reports and policy recommendations.

Evidence A1: the tenderer must provide references for 5 projects delivered in these fields in the last three years with a minimum value for each project of € 120.000 and that in combination show the required experience under Criterion A1.

- **Criterion A2:** The tenderer must prove capacity to work in EU official languages, including at least English and 5 other EU languages.

Evidence A2: the tenderer must provide references for 5 projects delivered in the last three years that in combination show 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.

- **Criterion A4:** The tenderer must prove its capacity to work in at least 5 EU countries.

Evidence A4: the tenderer must provide references for *five* projects delivered in the last three years. The combination of projects must cover the required geographical scope.

b. Criteria relating to the team delivering the service:

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

B.1 Cumulative team requirements: The cumulative experience of the team of at least 5 people delivering the service should, as a minimum, cover the following:

- Renewable heating technologies, in particular electric heating technologies (heat pumps, modern resistance heating, thermal storage of electricity); renewable electricity production, especially from wind and solar; technologies related to renewable hydrogen, synthetic heating fuels (e-gases and e-liquids), such as synthetic methane produced from renewable electricity; familiarity with district heating;

- Energy systems and energy scenarios modelling for the EU and its Member States, and the modelling of heating and cooling systems at hourly resolution; electricity systems' and grid modelling at EU and Member States' level; cost-benefit analysis for electricity generation and grid investment and heat generation and investment in heating systems at building and district level;
- EU policies and legislation related to renewable energy sources, energy performance of buildings, and new electricity market design, in particular the Recast Renewable Energy Directive, the new internal electricity market package, the EU Energy Performance of Buildings Directive, the EU Ecodesign and energy labelling framework;
- Familiarity with energy efficiency and energy performance calculations relevant to space and water heating; buildings and technical building systems, energy generation/transformation and energy transmission and distribution
- EU energy statistics in general and in particular on renewable energies and technologies

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.

B2 - Project Manager: At least 8 years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size (at least € 400.000) and coverage (at least 3 countries covered), with experience in management of team of at least 10 people.

Evidence: CV

B3 – Expert in energy system modelling, modelling of the electricity systems and grids; modelling of the heating systems, including in conjunction with the electricity systems, at EU and national level. Relevant higher education degree or at least 5-year professional experience in the field is required.

Evidence: CV

B4 – Expert in space heating and district heating technologies and their economic characteristics; buildings' energy performance and related regulation; renewable energy sources, renewable energy generation (electricity and heat) and renewable energy transmission distribution and networks; gas and hydrogen networks; e-hydrogen and e-fuels technologies, production pathways and infrastructures. Relevant higher education degree or at least 5-year professional experience in the field is required

Evidence: CV

B5 – Expert in EU energy and climate policies and legislation, in particular on renewables, on internal electricity and gas markets, on energy efficiency, including energy performance of buildings and eco-design and energy labelling. Relevant higher education degree or at least 5-year professional experience in the field is required

Evidence: CV

B6 – Expert in data collection, data analysis, EU energy statistics, including renewable energy statistics. Relevant higher education degree or at least 5-year professional experience in the field is required

Evidence: CV

B7 - Team language requirements and language quality check: at least three members of the team should have at least C1 level in the Common European Framework for Reference for Languages³ in English. Collectively the team of at least 5 people should have knowledge of English and several (at least 5 other) EU languages.

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

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 (80 points - – minimum score 50%)**

Sub-criterion 1.1 Clarity, adequacy, completeness and full coverage of the tasks, logical structuring of the approach to each task, as well as to the whole sequence of tasks (**10 points – minimum score 50%**)

Sub-criterion 1.2 Quality and appropriateness of the proposed approach for modelling the electricity system, including electric grids, in conjunction with the modelling of the heating system at EU and national level; appropriateness of the approach to model the scenarios required under Tasks 1-3; ability of the modelling approach to analyse heating demand and supply, including their spatial and temporal aspects (**20 points – minimum score 50%**).

Sub-criterion 1.3 Quality and appropriateness of the proposed approach for assessing the technical and economic characteristics and impacts of direct electrification of heating via renewable electricity and indirect electrification of heating via renewable hydrogen and e-fuels; quality and appropriateness of approach to reflect the characteristics of the heating and building sectors and the integration of heating with the electricity systems; ability to deliver the outputs listed in Tasks 1-3. (**20 points – minimum score 50%**).

Sub-criterion 1.4 Quality and appropriateness of proposed approach to analyse the barriers and provide policy recommendations to realise the most cost-effective scenario (**20 points – minimum score 50%**).

Sub-criterion 1.5 Quality and appropriateness of proposed detailed approach for the stakeholder workshop and presentations in relevant working groups (**10 points – minimum score 50%**).

- **Organisation of the work and resources (10 points – minimum score 50%)**

This criterion will assess how the roles and responsibilities of the proposed team and of the different 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, including

budget, 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 human 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 50%)**

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 control 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 50% for each criterion and sub-criterion, and minimum 60 % 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 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	*	30%	+	total quality score (out of 100) for all award criteria of tender X	*	70%
		price of tender X								

The tender ranked first after applying the formula will be awarded the contract.

5. LEGAL VALIDATION AND FINANCIAL VIABILITY ASSESSMENT

In the course of the procedure, tenderers are requested to register in the European Commission's Participant Register. On registering, each organisation obtains a Participants Identification Code (PIC, 9-digit number),

In the course of the procedure, the EU Validation Services (Research Executive Agency Validation Services) may contact tenderers via the Participant Register and ask for supporting documents with respect to the legal existence and status and economic and financial capacity. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

For this purpose, the EU Validation Services may request the tenderer to submit the following documents:

i. For the purpose of the legal validation of the entities:

- Signed legal entity identification form⁴:
 - Natural Person Form
 - Private Legal Entity Form
 - Public Legal Entity Form
- Official VAT document or — if the entity is not registered for VAT — the proof of VAT exemption, not older than 6 months.
- Signed Bank Account Form, and
- the following additional documents, where relevant:

Status	Documents to be submitted
Private body (including SME)	Registration extract (not older than 6 months).
Public body	Copy of the act, law, decree or decision that established the organisation as a public body (or, if this doesn't exist, any other official legal document that proves this).
Non-profit organisation	Copy of an official document attesting that the organisation has a legal or statutory obligation not to distribute profits to shareholders or individual members. The certificate of tax exemption may only constitute an indication of the non-profit status of the entity, which has to be assessed together with other elements.
Research organisation	Copy of an official document attesting that one of the main objectives of the entity is carrying out research or technological development.
Secondary or higher education establishment	Copy of an official document attesting that the organisation is recognised such as 'secondary or higher education establishment by the national education system and is entitled to deliver diplomas recognized by the State.
International organisation International organisation of European interest	Copy of the relevant international treaty creating the organisation under international public law.
Natural person	Copy (legible) of valid identity card or passport.

⁴ http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal-entities_en.cfm

Entities without legal personality	<ul style="list-style-type: none"> - Copy of an official document attesting that the representatives of the entity have the capacity to undertake legal obligations on its behalf. - Copy of an official document attesting that the entity has the same operational and financial capacity as that of a legal entity :i.e. <ul style="list-style-type: none"> - a document showing patrimony/asset/capital that is separated and different from those of the members/owners of the entity, and - a copy of the rules providing that creditors can rely on this patrimony/asset/capital and — in case of liquidation / insolvency — are reimbursed before the patrimony/asset/capital is divided between the owners/members.
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ii. For the purpose of preparing the financial capacity assessment:

Status	Documents to be submitted
Legal entity	<ol style="list-style-type: none"> 1. Profit and loss account 2. Balance sheet 3. Explanatory notes and/or annexes that form part of the above financial statements (if available) 4. External audit report¹², for the procurement domain – to be submitted on voluntary basis if the entity has already been audited for other purposes
Natural Person	<ol style="list-style-type: none"> 1. Income tax declaration 2. Certified declaration of current patrimony (may not be applicable to procurement), including: <ol style="list-style-type: none"> a. fixed patrimony (e.g. land, tenement, hereditament, medium/long-term time deposits (more than one year), stock options that cannot be exercised within one year) b. current patrimony (e.g. available cash, savings, short-term time deposits (maximum of one year), stock-options that can be exercised within one year) 3. List of certified debts, which must contain all debts (with dates and figures), broken down in short-term debts (of maximum one year) and medium/long-term debts (of more than one year)(may not be applicable to procurement).
Start-up companies without closed accounts	Business plan

6. 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 (*only 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 ENER C1 2019-481

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) ⁵	
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:	

⁵ For natural persons.

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 organisation⁶ I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

⁶ This person must be included in the list of legal representatives; otherwise the signature on the tender will be invalidated.

ANNEX 2

Comments [*in grey italics in square brackets*] are to be deleted and/or replaced by appropriate information.

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 	<input type="checkbox"/>	<input type="checkbox"/>

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.		
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<i>[Only for legal persons other than Member States and local authorities, otherwise delete this table]</i>		
➤ 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 contractor⁷

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:

⁷ To be filled in and signed by each partner in a joint tender except the lead partner.

Name (in capital letters), function, company and signature:

ANNEX 4

Standard Word template for studies

European
Commission

Add document title 1

Add title 2

1. TABLE OF CONTENTS

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2. HOW TO USE THIS DOCUMENT TEMPLATE

Cover page

Add the title of the document which should be center aligned. Add any other relevant information if necessary which should be left aligned on the left vertical axe of the EC logo.

The font colour of the title should be **White**.

Page set up

- Top margin: 3.5
- Bottom margin: 2.5
- Left margin: 3
- Right margin: 2.5

Headings and subheadings

The following styles should be used for headings and subheadings.

- Heading 1
Font type: Verdana
Font Size: 14
Colour: R:38, G:54, B:115
- Heading 2
Font type: Verdana
Font Size: 11
Colour: R:38, G:54, B:115
- Heading 3
Font type: Verdana
Font Size: 10
Colour: R:38, G:54, B:115

Do not use capital letters for the headings/subheadings, the format should always be "sentence case", except for abbreviations.

Body text

Font style: Verdana
Font size: 10
Font colour: Gray 80%

Header

The header should include the EU flag and the reference text:

- European Commission
- The title of the document
- Font type: Verdana Italic

- Font size: 8

Footer

Add the relevant name of the month and year in the footer which should appear to the left below the line.

- Font type: Verdana Italic
- Font size: 8.
- The page numbers will appear automatically.

Bulleted list

The bullet should be square and the colour should be Black. For reference please see list under "[Headings and subheadings](#)". To apply the style of the list, select "List Bullet 2" from the "Style" drop down menu.

Hyperlinks

By default the hyperlinks will appear in blue (colour coder: R:26, G:63, B:124), no underline.

Table of Contents

This template is complete with Styles for a Table of Contents. From the **Insert menu**, choose **Reference**, then **Index and Tables**. Click on the tab "**Table of Contents**". In the "Format" box, select "From template".

ANNEX 5

DRAFT CONTRACT

Please see separate document