



**EUROPEAN COMMISSION**  
DIRECTORATE-GENERAL FOR ENERGY

Directorate C – Renewables, Research and Innovation, Energy Efficiency  
The Acting Director

## **CALL FOR TENDERS**

**N° ENER/C1/2018-495**

# **Policy Support for Heating and Cooling Decarbonisation**

## **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 Procurement<sup>1</sup> 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/EU<sup>2</sup>.

### **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.

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<sup>1</sup> See [http://www.wto.org/english/tratop\\_e/gproc\\_e/gp\\_gpa\\_e.htm](http://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm)

<sup>2</sup> 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 300.000. 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). 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. Introduction and objectives of the tender**

The revised Renewable Energy Directive (the Directive) 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 optional non-binding at least 1 percentage point annual average increase in renewable and waste heat and cold for district heating and cooling. At the same time, the EU is committed to decarbonise the energy sector, including heating and cooling in buildings and industry in order to arrive to a net-zero greenhouse gas emissions economy by 2050 to comply with the 2015 Paris Agreement<sup>3</sup>.

Heating and cooling account for 50% of the EU final and primary energy consumption. Around 75% of heating is based on fossil fuels, while consumption is mostly inefficient, especially in buildings. Only 19% of heating is provided from renewable energy sources<sup>4</sup>. 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 structures, infrastructures and equipment stocks. The production and consumption is decentralised taking place in millions of buildings, business facilities and industrial plants. More centralised production of heat or cold takes place in district energy systems, but these themselves are decentralised compared to electricity or gas networks, as covering not larger geographies than the territory of a city.

Support for the sharing and organisation of the knowledge base, for policy discussions to explore decarbonisation pathways, policies, solutions and actions is necessary for this large, diverse, local and fragmented sector to facilitate the forging of a viable roadmap and solution pathways to

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<sup>3</sup> A Clean Planet for all. A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy, COM(2018) 733, 28.11.2018.

<sup>4</sup> Eurostat SHARES, 2016.

decarbonise the heating and cooling sector. Common reflexion is all the more necessary as the transformation towards a net-zero greenhouse gas economy will affect the national and local economies, the life of every citizens, businesses and local communities. Bringing together the relevant policy makers, public authorities at all levels, industry, technology and solutions providers, energy suppliers, investment and financial bodies, academia and research communities, citizens and their organisations is instrumental for the change to happen in a way that provide positive experience and benefits for all.

The objectives of the contract is to:

- Produce and make available online a meta-study cataloguing relevant research and projects
- provide a consultation forum on-line and facilitate the publication of documents
- identify and analyse key issues
- fill knowledge gaps and discuss heat and cooling decarbonisation pathways
- organise and facilitate meetings and a conference
- propose a roadmap for decarbonisation

The stakeholder platform will gather interested stakeholders from EU Member States and other European countries, EU institutions and bodies, national, regional and local authorities, industry, NGOs, academic, scientific and research institutions, trade associations and professional bodies.

## **2.2. Description of tasks**

### **Task 1: Prepare a meta-study on studies, projects, research and modelling conducted on heating and cooling**

The contractor will prepare a meta-study on studies, projects, modelling analysis, scientific and academic research (thereafter studies and projects) related to the energy transition in heating and cooling towards clean energy and decarbonisation. The meta-study will provide a literature review and summarise the subjects and results of relevant studies and projects conducted under EU research programs, in particular FP7, IEE, Horizon 2020, by Member States and their competent bodies, universities, research institutions, trade and scientific associations and other relevant actors operating in Europe or outside Europe as relevant.

The meta-study will cover studies and projects related to the decarbonisation of the heating and cooling sector, covering inter alia:

- Modelling of pathways
- Decarbonisation technologies, equipment and products
- Decarbonisation of heating and cooling in buildings and industry
- Renewable energy and energy efficiency
- New energy carriers
- Demonstration and market uptake facilitation
- Policies and regulation
- Financing and support
- Capacity building
- Basic research

The contractor will prepare a catalogue (paper and on-line data-base) with entries on the studies and projects reviewed, and will provide a critical assessment and summary of the main directions and the results of the scientific research. The critical assessment will identify unresolved and open issues and areas of heat decarbonisation covering *inter alia* policy, technology, research, administrative and technical capacity.

The final scope (subject matters, timeframe) of the meta-study, the structure of the entries and the review, the geographical coverage of the authors reviewed and the modalities of on-line publication will be defined in agreement with the Commission.

The contractor will be responsible for the high quality and completeness of the data collection and review, the contact with authors for authorisation, the on-line publication and will manage and maintain the on-line catalogue.

The contractor will set up, manage and maintain the on-line catalogue and meta-study for the duration of the contract and will ensure that the web design and quality of the on-line catalogue is capable of enabling its continuation beyond the lifetime of the contract, if deemed useful.

**Task 2: Establish and on-line stakeholder platform on the decarbonisation of heating and cooling.**

The contractor will set-up, manage and maintain an on-line platform for the duration of the contract and will ensure that the web design and quality of the on-line platform is capable of enabling the continuation of the on-line platform beyond the lifetime of the contract, if deemed useful.

The on-line platform will enable the publication of the documents and contents relevant to the activities of the stakeholder platform, including documents of the expert stakeholder workshop meetings and the decarbonisation conference of the stakeholder platform under Task 4. It will provide a consultation forum on the draft heating and cooling decarbonisation roadmap under Task 3 and the final roadmap under Task 5.

**Task 3: Propose a draft roadmap on heating and cooling decarbonisation**

Building on Task 1, the contractor will prepare a draft roadmap proposing recommendations, toolbox and timetable to address heating and cooling decarbonisation taking into account its key determining factors (e.g. supply sources, technologies, infrastructures, supply and end-use conditions in buildings and industry) and dimensions (e.g. climatic and geographic differences, policies, regulations and legacy conditions at EU, national, regional, local levels).

**Task 4: Organise and conduct stakeholder expert workshops and a decarbonisation conference**

**Sub-Task 4.1: Organise three expert stakeholder consultation workshops**

The contractor will organise up to three expert meetings with the involvement of the heating and cooling sector stakeholders and other actors interested in heat decarbonisation. The Commission will provide the venue.

The contractor will prepare for the workshops by researching and developing the subject matters, drafting input papers and analyses under the guidance of the Commission. 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 workshops into the deliverables under Task 3. The workshops should take place based on the work under Task 1 and 3, and before the finalisation of Task 3 in agreement with European Commission. The time of the meetings will be established by the European Commission.

#### **Sub-task 4.2: Organise a heating and cooling decarbonisation conference**

The contractor will organise a broad based heating and cooling decarbonisation conference with the involvement of the heating and cooling industry and all other relevant actors interested in heat decarbonisation. The Commission will provide the venue.

Under the guidance of the Commission, the contractor will prepare for the conference by finalizing the draft roadmap under Task 3, and researching for and providing additional analyses of topics necessary to prepare the draft roadmap under Task 3 for finalization under Task 5. 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 conference into its final deliverables under Task 5. The time of the meetings will be established by the European Commission.

#### **Task 5: Propose final roadmap on heating and cooling decarbonisation**

The contractor will evaluate the received feedback during the stakeholder expert workshops and the conference under Task 4, and adjust the approach as needed on the heating and cooling decarbonisation roadmap in agreement with the European Commission. The final roadmap will be published on the on-line platform after the approval of the European Commission.

### **2.3. General principles for the work and timetable**

The contractor will review the literature relating to the subject matters under Tasks 1, 3 and 5, and will take existing literature, data and analysis into consideration, while providing its own critical analysis and updates. The contractor will ensure contact with, and involvement of relevant scientific, research communities, and stakeholders throughout Tasks 1-5.

The duration of the tasks shall not exceed **24 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 structure, the outline and a first draft under Tasks 1, the deliverable under Task 2 and the draft deliverable under Task 3 shall be provided at the latest **6 months** following the entry into force of the contract.

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 the complete draft deliverables under Tasks 1, shall be provided at the latest **12 months** following the entry into force of the contract.

Following the submission of the second 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 first two **stakeholder workshop** shall be organised at the latest within **16 months** following the entry into force of the contract.

The third stakeholder workshop and the conference shall be organised at the latest **20 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 **22 months** after the entry into force of the contract.

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

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

### **3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES**

The contractor must deliver the meta-study and the roadmap following the structure of the deliverables under the tasks. The public consultation materials and the workshop proceedings should be annexes of the roadmap. The meta-study, the roadmap should be provided in both paper and electronic formats. 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, both in English and French;
- 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 both in English and French 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](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 1-5.

## **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](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 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. Regulatory capacity**

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:** Annual turnover of the last two financial years above EUR 300.000,00; 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;

#### **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 EU climate and energy policies and regulations (in particular renewable energy, energy efficiency, eco-design, energy labelling, Energy Performance of Buildings); expertise in EU policy making processes, expertise in academic and scientific research, including energy scenarios and modelling, clean energy, renewable energy and energy efficiency, buildings and nearly zero energy buildings, heating and cooling; including related technologies, IT expertise in on-line platforms and communication, web-master; stakeholder consultation, data collection, drafting 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.

- **Criterion A2:** The tenderer must prove capacity to work in English.

**Evidence A2:** the tenderer must provide references for 5 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.

- **Criterion A4:** The tenderer must prove its capacity to work in at least 6 EU countries.

**Evidence A4:** the tenderer must provide references for 3 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.

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

**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:

- EU climate and energy policies and regulations, EU policy processes in particular related to greenhouse gas emissions reduction, renewable energy, energy efficiency, energy performance of buildings, eco-design and energy labelling, heating and cooling;
- Heating and cooling decarbonisation scenarios and modelling;
- Energy technologies related to heating and cooling, renewable energy, district heating and cooling, cogeneration, heat pumps, etc.;
- Buildings' energy performance and buildings' technical systems for heating and cooling;
- Academic and scientific research in the field of clean low-carbon energy, renewable energy, heating and cooling, energy system modelling and heat mapping, renewables, energy efficiency, and decarbonisation;
- Familiarity with heat sector industries and stakeholders at EU, national, regional and local levels;
- IT expertise in on-line platforms and communication, webmaster;
- On-line publication;
- Writing of policy documents and reports in the field of EU energy policies;
- Meeting and conference organisation.

Evidence: CVs

**B2 - Project Manager:** At least 8 years' experience in project management of projects supported or carried out under EU programmes and policies, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience. Relevant experience in at least 2 projects of a similar size (at least € 300.000,00) and coverage (at least 5 countries covered), with experience in management of team of at least 5 people.

Evidence: CV

**B3 – Expert in** EU climate and energy policies and EU policy making and consultation processes, in particular as relate to renewable energy, energy efficiency, energy performance of buildings, eco-design and energy labelling, heating and cooling, greenhouse gas emissions' reduction; familiarity with heat sector stakeholders. Relevant higher education degree and at least 8 years of professional experience in the field.

Evidence: CV

**B4 – Expert in** energy system modelling and scenarios on energy decarbonisation, in particular decarbonisation of heating and cooling in buildings and industry, including heat mapping, academic and scientific research and writing expertise in renewable energy, energy efficiency, heating and cooling, buildings' energy performance, energy sector, decarbonisation scenarios. Relevant higher education degree and at least 5 years of professional experience in the field. More than one expert can cumulatively provide the expertise; however, in this case at least one

expert should have at least 5-year professional experience in energy system modelling and academic- and scientific research and writing.

**Evidence:** CV

**B5 – Expert in** energy technologies related to heating and cooling, renewable energy, district heating and cooling, cogeneration, heat pumps, buildings' heating and cooling systems. Relevant higher education degree and at least 5 years of professional experience in the field. More than one expert can cumulatively provide the expertise; however, in this case at least one expert should have at least 5-year professional experience in energy technologies related to heating and cooling.

**Evidence:** CV

**B6 – Expert in** on-line communication and platforms, on-line publishing, webmaster. Relevant education degree and at least 3 years of professional experience in the field.

**Evidence:** CV

**B7 – Team language requirements and language quality check:** at least 4 members of the team should have at least C1 level in the Common European Framework for Reference for Languages<sup>5</sup> in English. Collectively the team of at least 5 people should have knowledge of English and several (at least 4 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** – Complete and comprehensive coverage of all the tasks, clarity and 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 proposed approach to conduct and deliver the meta-study in a scientifically sound and rigorous way (20 points) – minimum score 50%)

**Sub-criterion 1.3** – Quality and appropriateness of the proposed approach to establish the on-line stakeholder platform and provide on-line communication capabilities, including for the on-line publication of the meta-study (20 points — minimum score 50%)



**Sub-criterion 1.4** – Quality and appropriateness of proposed approach to elaborate the roadmap taking into account relevant EU climate and energy policies, EU policy making processes and the broad-based stakeholder group active in heating and cooling (20 points – minimum score 50%)

**Sub-criterion 1.5** – Quality and appropriateness of proposed detailed approach for organising and managing stakeholder consultation, the workshops and conference (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 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 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	*	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 form<sup>6</sup>:  
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.

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<sup>6</sup> [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal-entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal-entities_en.cfm)

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.
Entities without legal personality	<ul style="list-style-type: none"> <li>– Copy of an official document attesting that the representatives of the entity have the capacity to undertake legal obligations on its behalf.</li> <li>– 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"> <li>- a document showing patrimony/asset/capital that is separated and different from those of the members/owners of the entity, and</li> <li>- 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.</li> </ul> </li> </ul>

ii. For the purpose of preparing the financial capacity assessment:

Status	Documents to be submitted
Legal entity	<ol style="list-style-type: none"> <li>1. Profit and loss account</li> <li>2. Balance sheet</li> <li>3. Explanatory notes and/or annexes that form part of the above financial statements (if available)</li> <li>4. External audit report<sup>12</sup>, for the procurement domain – to be submitted on voluntary basis if the entity has already been audited for other purposes</li> </ol>
Natural Person	<ol style="list-style-type: none"> <li>1. Income tax declaration</li> <li>2. Certified declaration of current patrimony (may not be applicable to procurement), including: <ol style="list-style-type: none"> <li>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)</li> <li>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)</li> </ol> </li> <li>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).</li> </ol>

Start-up companies without closed accounts	Business plan
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## 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
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/2018-495

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) <sup>7</sup>	
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:	

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<sup>7</sup> For natural persons.

E-mail address:	
<b>Legal Representatives</b>	
<b>Names and function of legal representatives</b> and of other representatives of the tenderer who are authorised to sign contracts with third parties	
<b>Declaration by an authorised representative of the organisation<sup>8</sup></b> I, the undersigned, certify that the information given in this tender is correct and that the tender is valid.	
Surname: First name:	Signature:

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<sup>8</sup> 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 on honour on exclusion criteria and selection criteria

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

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

The person is not required to submit the declaration on exclusion criteria if the same declaration has already been submitted for the purposes of another award procedure of the same contracting authority<sup>9</sup>, provided the situation has not changed, and that the time that has elapsed since the issuing date of the declaration does not exceed one year.

In this case, the signatory declares that the person has already provided the same declaration on exclusion criteria for a previous procedure and confirms that there has been no change in its situation:

Date of the declaration	Full reference to previous procedure

#### I – SITUATION OF EXCLUSION CONCERNING THE PERSON

➤ declares that the above-mentioned person is in one of the following situations:	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 EU or national laws or regulations;	<input type="checkbox"/>	<input type="checkbox"/>

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<sup>9</sup> The same institution or agency.

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 applicable law;	<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 or an agreement;	<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 the following:		
(i) fraud, within the meaning of Article 3 of Directive (EU) 2017/1371 and 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 4(2) of Directive (EU) 2017/1371 and Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union, drawn up by the Council Act of 26 May 1997, and conduct referred to in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the applicable law;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) conduct related to a criminal organisation, as referred to in Article 2 of Council Framework Decision 2008/841/JHA;	<input type="checkbox"/>	<input type="checkbox"/>
(iv) money laundering or terrorist financing, within the meaning of Article 1(3), (4) and (5) of Directive (EU) 2015/849 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 offences concerning trafficking in human beings as referred to in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
e) it has shown significant deficiencies in complying with the main obligations in the performance of a contract or an agreement financed by the Union's budget, which has led to its early termination or to the application of liquidated	<input type="checkbox"/>	<input type="checkbox"/>



damages or other contractual penalties, or which has been discovered following checks, audits or investigations by a contracting authority, OLAF or the Court of Auditors;		
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) it has been established by a final judgment or final administrative decision that the person has created an entity under a different jurisdiction with the intent to circumvent fiscal, social or any other legal obligations of mandatory application in the jurisdiction of its registered office, central administration or principal place of business.	<input type="checkbox"/>	<input type="checkbox"/>
h) ( <i>only for legal persons</i> ) it has been established by a final judgment or final administrative decision that the person has been created with the intent provided for in point (g).	<input type="checkbox"/>	<input type="checkbox"/>
i) for the situations referred to in points (c) to (h) above the person is subject to: i. facts established in the context of audits or investigations carried out by the European Public Prosecutor's Office after its establishment, the Court of Auditors, the European Anti-Fraud Office or the internal auditor, 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. facts referred to in decisions of entities or persons being entrusted with EU budget implementation tasks; iv. information transmitted by Member States implementing Union funds; v. decisions of the Commission relating to the infringement of Union competition law or of a national competent authority relating to the infringement of Union or national competition law; or vi. 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"/>

## II – SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS WITH POWER OF REPRESENTATION, DECISION-MAKING OR CONTROL OVER THE LEGAL PERSON AND BENEFICIAL OWNERS

### *Not applicable to natural persons, Member States and local authorities*

➤ declares that a natural or legal 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 e.g. company directors, members of management or supervisory bodies, and cases where one natural or legal person holds a majority of shares), or a beneficial owner of the person (as referred to in point 6 of article 3 of Directive (EU) No 2015/849) is in one of the following situations:	YES	NO	N/A
Situation (c) above (grave professional misconduct)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Situation (d) above (fraud, corruption or other criminal offence)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (e) above (significant deficiencies in performance of a contract )	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (f) above (irregularity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (g) above (creation of an entity with the intent to circumvent legal obligations)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (h) above (person created with the intent to circumvent legal obligations)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### **III – SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS ASSUMING UNLIMITED LIABILITY FOR THE DEBTS OF THE LEGAL PERSON**

➤ declares that 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:	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"/>

### **IV – GROUNDS FOR REJECTION FROM THIS PROCEDURE**

(4) declares that the above-mentioned person:	YES	NO
Was previously involved in the preparation of the procurement documents used in this award procedure, where this entailed a breach of the principle of equality of treatment including distortion of competition that cannot be remedied otherwise.	<input type="checkbox"/>	<input type="checkbox"/>

### **V – REMEDIAL MEASURES**

If the person declares one of the situations of exclusion listed above, it must indicate measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. This may include e.g. technical, organisational and personnel measures to prevent further occurrence, compensation of damage or payment of fines or of any taxes or social security contributions. The relevant documentary evidence which illustrates the remedial measures taken must be provided in annex to this declaration. This does not apply for situations referred in point (d) of this declaration.

### **VI – EVIDENCE UPON REQUEST**

Upon request and within the time limit set by the contracting authority the person must provide information on natural or legal persons that are members of the administrative, management or supervisory body or that have powers of representation, decision or control, including legal and natural persons within the ownership and control structure and beneficial owners.

It must also provide the following evidence concerning the person itself and the natural or legal persons on whose capacity the person intends to rely, or a subcontractor and concerning the natural or legal persons which assume unlimited liability for the debts of the person:

For situations described in (a), (c), (d), (f), (g) and (h), 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 (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.

The person is not required to submit the evidence if it has already been submitted for another award procedure of the same contracting authority<sup>10</sup>. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

## VII – SELECTION CRITERIA

(1) declares that the above-mentioned person complies with the selection criteria applicable to it individually as provided in the tender specifications:	YES	NO	N/A
(a) It has the legal and regulatory capacity to pursue the professional activity needed for performing the contract as required in section [insert] of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) It fulfills the applicable economic and financial criteria indicated in section [insert] of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) It fulfills the applicable technical and professional criteria indicated in section [insert] of the tender specifications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*The contracting authority must adapt the table above to the criteria indicated in the tender specifications (i.e. insert extra rows for each criterion or delete irrelevant rows).*

(2) if the above-mentioned person is the <b>sole tenderer</b> or the <b>leader in case of joint tender</b> , declares that:	YES	NO	N/A
(d) the tenderer, including all members of the group in case of joint tender and including subcontractors if applicable, complies with all	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<sup>10</sup> The same institution or agency.

the selection criteria for which a consolidated assessment will be made as provided in the tender specifications.			
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## VIII – EVIDENCE FOR SELECTION

The signatory declares that the above-mentioned person is 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.

The person is not required to submit the evidence if it has already been submitted for another procurement procedure of the same contracting authority<sup>11</sup>. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

***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.***

Full name

Date

Signature

---

<sup>11</sup> The same institution of agency.

## ANNEX 3

### POWER OF ATTORNEY

**mandating one of the partners in a joint tender as lead partner and lead contractor<sup>12</sup>**

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:

<sup>12</sup> To be filled in and signed by each partner in a joint tender except the lead partner.

ANNEX 4  
Standard Word template for studies



**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 axis 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*