



## Tender Specifications

### Framework contracts(s) for expert assistance in:

#### 1. Transport and environment; and

#### 2. Energy and environment

(2 lots)

### Open call for tender EEA/ACC/09/001

#### 1. Title of contract

This call for tender contains two lots:

- **Lot 1: Expert assistance in Transport and environment**
- **Lot 2: Expert assistance in Energy and environment**

#### 2. Background information

The European Environment Agency (EEA) has been charged with providing comprehensive and impartial assessments of the state of the environment in Europe as well as reporting on the drivers behind the development. This is done via a range of different products such as reports, briefings, presentations, multimedia products, etc. Many of these products are available on the EEA website ([www.eea.europa.eu](http://www.eea.europa.eu)).

Among the economic sectors covered by the EEA assessments is the transport and energy sectors which are seen as two key problem sectors in terms of environmental performance. Because of the interlinkage to other sectors of the economy, environmental problems within the sectors often have to be addressed in a multi-disciplinary way.

Analysis needs to take this complexity into consideration, and therefore assessments are normally developed in collaboration between people with different technical backgrounds as well as different areas of work (air emissions, climate change issues, transport management, land planning, energy efficiency, energy distribution, etc).

##### 2.1 Transport

In order to report on the performance of the sector and the linkages to other sectors, the Transport and Environment Reporting Mechanism (TERM) was set up in 2000, and has since reported annually on the performance of the sector. TERM consists of a set of indicators and an annual report, all of which can be downloaded from the EEA website

([www.eea.europa.eu](http://www.eea.europa.eu)). TERM is continuously being developed to adapt better to the needs of the policy community it serves.

In addition to the work on TERM, EEA is involved in other studies related to transport on a more ad-hoc basis. Work on transport subsidies and on geographically specific air emission inventories is ongoing. In the field of climate change it is obvious that the transport sector will be crucial in order to meet short and long term targets. EEA has therefore recently started a project focused on climate change and transport in order to assess needs and possibilities to address that issue. Currently the work is focusing on international aviation and maritime transport but will be broadened in the years to come.

EEA is also working in the areas of greenhouse gas emissions, air emissions, noise, land use, etc. which all have transport components, but where the focus is broader than just the transport sector.

Information on past EEA work on the transport sector can be found at: <http://www.eea.europa.eu/themes/transport>

## **2.2 Energy**

The focus on the environmental pressures and impacts related to production and consumption of energy has been increasing on the political agenda during the last decade. These pressures and impacts include climate change, air pollution, waste, biodiversity concerns and intrusion in the landscape by infrastructure. All energy sources, including renewable energy (while in most cases reducing emissions of greenhouse gases and air pollutants), contribute to those impacts.

On 23 April 2009, the European Commission adopted the climate change and energy package. The package contains the following policy initiatives:

- A Directive revising the EU Emissions Trading System (EU ETS), which covers some 40 % of EU greenhouse gas emissions;
- An "effort-sharing" Decision setting binding national targets for emissions from sectors not covered by the EU ETS;
- A Directive setting binding national targets for increasing the share of renewable energy sources in the energy mix;
- A Directive creating a legal framework for the safe and environmentally sound use of carbon capture and storage technologies.

With this package, the EU leaders committed the EU to cutting its greenhouse gas emissions by 20 % of 1990 levels by 2020 (30 % provided other developed countries commit to making comparable reductions under a global agreement), to cut primary energy consumption by 20 % compared with projected trends (2005 as a base year) and to increase to 20 % in renewable energies' share of total final energy consumption, with an increase to 10 % in the share of renewable fuels in transport. Texts on the climate change and energy package as adopted by the European Council and the European Parliament are available at:

[http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/misc/107136.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/misc/107136.pdf).

Addressing climate change requires also to take adaptation action, also in the energy sector, to deal with the unavoidable impacts as indicated in the recent white paper published by the European Commission in April 2009 « Adapting to climate change: Towards a European framework for action » and available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2009:0147:FIN:EN:PDF>

On the occasion of the second strategic review of the energy market, in November 2008, the European Commission proposed a wide-ranging energy package which gives a new boost to energy security in Europe, i.e.

- A new strategy to build up energy solidarity among Member States and a new policy on energy networks to stimulate investment in more efficient, low-carbon energy networks.
- An Energy Security and Solidarity Action Plan to secure sustainable energy supplies in the EU and looking at the challenges that Europe will face between 2020 and 2050.
- A package of energy efficiency proposals aiming to make energy savings in key areas, such as reinforcing energy efficiency legislation on buildings and energy-using products.

The texts for all relevant proposals are available at: [http://ec.europa.eu/energy/strategies/2008/2008\\_11\\_ser2\\_en.htm](http://ec.europa.eu/energy/strategies/2008/2008_11_ser2_en.htm).

On 22 April, the European Parliament endorsed an agreement struck by EU institutions on the third liberalization package. The new legislation consists of two directives on rules for the internal electricity and gas markets, two regulations on conditions for access to those markets and one establishing an 'Agency for the Cooperation of Energy Regulators'. The latest text adopted by the European Parliament is available at: <http://www.europarl.europa.eu/sides/getDoc.do?language=EN&type=TA&reference=20090422&secondRef=TOC>.

Increasing attention is therefore given by the European Environment Agency to improve the integration of environmental considerations into these future energy policy processes.

Information on past EEA work on the energy sector can be found at: <http://www.eea.europa.eu/themes/energy>

### **3. Purpose and context of the call**

#### **3.1 Lot 1 – Transport and environment**

The EEA's work programme is developed in consultation with a range of stakeholders and approved by the management board. It is therefore not possible to specify in detail which topics will be worked on in the future. However, the following list is indicative of the areas to be covered:

- Indicators on transport and environment within the framework of TERM will be a main area of activity in the years to come. This includes analysing data, further development of indicators, reporting of findings and communication of results.
- Establishing a database of transport flows and emission characteristics in order to be able to describe the geographical distribution of transport emissions of air pollutants and noise and total emissions of greenhouse gases.
- Analysis of the technology options for reductions in emissions of air pollution from transport. This includes linking geographically specific emission data with projections of developments in the vehicle fleet in order to project the effects of different technologies.
- Analysis of the effect of noise abatement strategies in different EU Member States.
- Analysis of the environmental effect of modal shift policies.
- Analysis of transports contribution to air quality problems in urban areas.
- Analysis of the effectiveness of different measures in reducing the climate change effects for different modes of transport.
- Analysis of the external costs of transport and the effect of use of economic and other policy instruments in transport policy.

Some tasks are carried out in-house whereas others are carried out either by consultants or by some of the specialised European Topic Centres and also with experts from Eurostat and JRC covering specific fields of expertise. The consultant will be asked to take on a role within this that will be defined from task to task, always in close cooperation with the responsible EEA contact person (project manager/head of group) and, as may be the case, other EEA staff.

The purpose of this framework contract is to support this work in the areas of data collection, data analysis, assessment and reporting.

Data collection is to a large extent handled via agreements with such organisations as Eurostat, OECD, UNECE, etc., but in some cases these datasets need to be complemented with detailed national studies and case stories in order to provide a more comprehensive picture of the state of the environment, development directions and needs for policy. The consultant will therefore be asked to compile and extract relevant data from the central sources and from national studies into Excel sheets in preparation for analysis.

Data and texts are exchanged as word processing, spreadsheets and/or as databases compatible with the EEA data IT system. All materials are to be delivered in a format compatible with the EEA's IT system and tools.

Data analysis and assessment entails converting data into relevant information on the drivers for development, pressures on the environment, state of the environment, impacts from transport and the response of society. The process requires a great deal of dialogue with relevant EEA project managers.

Reporting requires turning information into concise and relevant products (reports, fact sheets, presentations, briefings, etc.) with a strong focus on the recipients. EEA places a high emphasis on ensuring that products are adapted to the needs of users and delivered in high quality both with respect to content and to form.

### **3.2. Lot 2 – Energy and environment**

The purpose of this framework contract is to support this work in the areas of data collection, data analysis, assessment and reporting.

Data collection is to a large extent handled via agreements with such organisations as Eurostat, IEA/OECD, ADEME, etc., but in many cases these datasets need to be complemented with detailed national studies and case stories in order to provide a more comprehensive picture of the state of the environment, development directions and needs for policy. The consultant will therefore be asked to compile and extract relevant data from the central sources and from national studies into Excel sheets in preparation for analysis.

Data and texts are exchanged as word processing, spreadsheets and/or as databases compatible with the EEA data IT system. All materials are to be delivered in a format compatible with the EEA's IT system and tools.

Data analysis and assessment entails converting data into relevant information on the drivers for development, pressures on the environment, state of the environment, impacts from energy production and consumption and the response of society. The process requires a great deal of dialogue with relevant EEA project managers.

Reporting requires turning information into concise and relevant products (reports, fact sheets, technical papers, presentations, briefings, etc.) with a strong focus on the targeted audience. EEA places a high emphasis on ensuring that products are adapted to the needs of users.

The Contractor may be required to provide services in particular with regard to the following (indicative list):

- Further development of the energy and environment reporting mechanism, including energy and environment indicator-based reports as well as focus reports and technical papers; this activity should also address wider sustainability concerns; This includes analysing data, further development of indicators, reporting of findings and communication of results;
- Developing further data, indicators and methods for monitoring and assessing progress with the integration of environmental considerations into the energy sector and environmental progress achieved;
- Conducting specific studies on the effectiveness and coherence of environmental, energy and other policy instruments and measures;
- Scenario and outlook activities on energy and environment, specifically for the next EEA state of the environment and outlook report (due to be published in 2010) to reflect the potential environmental consequences of different energy pathways to address climate change and security of supply (including shifting towards a more decentralised energy system, grid issues, technological options, etc);
- Work on renewable energy, including analyzing the environmentally compatible potentials and identifying benefits and environmental pressures of different shares of renewable energies in different sectors (electricity, heat and transport), including impacts stemming from the interactions between sectors (energy, transport and agriculture);
- Work on energy efficiency both in transformation sector as well as end-use;
- Work on adaptation actions in energy sector;
- Work with energy related experts, organisations and authorities throughout Europe, including among others the development of web-based networking tools and organising and participating in expert meetings and workshops.
- Analysis of environmental implications (GHG emissions, air pollution, impact on biodiversity and marine environment, land-use, noise, etc) of different energy technology options for mitigation of and adaptation to climate change while meeting Europe's security of energy supply needs (including regional issues concerning neighboring countries);
- Impact of future energy systems on urban and rural areas (air quality, water use, land-use, etc);
- Use of economic instruments to achieve policy targets and effectiveness of environmental and energy policies;

#### **4. Duration of contract, volume and contractual conditions**

The EEA will conclude one or more framework contract(s) (max. one per lot) for a period of 48 months from the entry into force of the contract(s). The framework contract(s) will be implemented through specific contracts which alone shall bind the Agency. Annexes to such specific contracts will include detailed descriptions of services and deliverables to be provided. For details reference is made to the terms and conditions of the draft framework contract and draft specific contract which form parts of the tender documents.

The total budget of the contract(s) for both lots is estimated at a maximum of 2 000 000 EUR (approximately 1 000 000 EUR per lot) over its/their entire duration.

#### **5. Geographical area to be covered**

The geographical area includes the 32 EEA member countries (see link: <http://www.eea.europa.eu/about-us/countries-and-eionet>), with an emphasis on EU policies. Assessments may extend to the pan-European (see latest pan-European assessment report [http://www.eea.europa.eu/publications/state\\_of\\_environment\\_report\\_2007\\_1](http://www.eea.europa.eu/publications/state_of_environment_report_2007_1)) or global scale where relevant.

#### **6. Place of work**

Work shall mainly be carried out at the contractor's own premises. Missions to the EEA premises in Copenhagen will occur regularly, and intra-muros work for specified periods cannot be ruled out. Other missions within the EEA-32 may occur to a limited extent.

#### **7. Working language and technical output specification**

The working language is English. Data and texts are exchanged as word processing, spreadsheets and/or as databases compatible with the EEA data IT system. All materials are to be delivered in a format compatible with the EEA's IT system and tools. All deliverables under specific contracts shall be provided in English.

#### **8. Documentation for tenderers**

Relevant documents about the EEA include the new EEA Strategy 2009-2013, the Annual Management Plan for 2009, and Annual Reports, which can be found on the EEA's website: <http://www.eea.europa.eu/about-us/documents>

The website also provides older management plans and other documents.

Work previously carried out in both areas of this call is documented on the EEA's website:

<http://www.eea.europa.eu/products>

Tenderers are reminded of the continuously increasing requirements in the EEA's work, implying that products delivered in the past may not necessarily be representative of future demands and standards.

## **9. Price**

Tenderers shall quote all-inclusive daily rates for Senior consultants (SC), Junior consultants (JC) and Assistants (A), the calculated average of which shall form the basis for the price evaluation (as specified under section 10.3 of this document).

Prices shall be fixed, all-inclusive and not subject to revision for implementation during the first year of duration of the Contract. From the beginning of the second year of duration of the Contract, prices may be revised upwards or downwards each year in accordance with Article I.3 of the framework contract.

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities and the Headquarters Agreement between the Agency and the Government of Denmark of 17 August 1995, the Agency is exempt from all charges, taxes and dues, including value added tax; such charges may not therefore be included in the calculation of the price quoted; VAT amount must be indicated separately.

Prices tendered must be expressed in euro; this applies also to countries that are not part of the euro zone. For tenderers in countries that are not part of the euro zone, the price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an exchange rate and assume the risks or the benefits deriving from any variation (any exchange risks are the contractor's).

The costs incurred in preparing and submitting tenders is to be borne by the tenderers and cannot be reimbursed.

## **10. Criteria**

### **10.1 Exclusion criteria**

Tenderers must provide a declaration on their honour, duly signed and dated, stating that they comply with the exclusion criteria listed in Annex 1. Non-compliance with these criteria will lead to exclusion.

### **10.2 Selection criteria (as indicated in Section III.2. (Conditions for participation) of the Contract notice**

### 10.3 Award criteria

The framework contract(s) (max. 1 per lot) will be awarded to the tenderer with the best price-quality ratio per lot. Tenders will be separately evaluated, lot by lot, taking into account the following criteria:

#### 10.3.1 Lot 1 – Transport and environment:

##### A. Technical merit (TM) – 100 points maximum; 65 points minimum)

No	Criterion	Max Points	Min. Required
1.	Levels of understanding of the Agency’s demands and of the overall expertise offered to meet these demands covering all 10 fields specified under 10.2 (section III.2.3 of the contract notice); (both aspects are to be documented, field by field, in a reasoned summary statement as set out in Annex 3).	65	40
2.	Composition of the proposed team in terms of its geographic and linguistic coverage as well as its networking scope.	15	10
3.	Robustness and clarity of the project and quality management procedures to ensure timely delivery of consistent results according to the highest quality standards; (the approach to achieve that is to be documented in a reasoned summary statement as set out in Annex 4).	20	15

*Tenders scoring less than the required minima will not be considered further.*

##### B. Price (P)

Tenderers must quote all-inclusive daily rates for each of the required profiles (as defined in III.2. (technical and professional capacity) of the Contract notice), the total average of which as indicated below will be taken into account for the price evaluation:

Profile	EEA premises and within EEA-32 Daily rate (EUR) (X)	Contractor’s premises Daily rate (EUR) (Y)	Subtotal
Senior Consultant (SC)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
Junior Consultant (JC)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
Assistant (A)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
$\text{Total}_{\text{AVG}} (\text{SC}_{(X+Y)/2} + \text{JC}_{(X+Y)/2} + \text{A}_{(X+Y)/2}) / 3 =$			... EUR

*All fields are mandatory. Non-compliance leads to exclusion.*

Tenders meeting all mandatory requirements including the minima for technical merit will score points in function of the following formula:  $(P_{min}/P) \times 100$ , in which  $P_{min}$  being the lowest financial offer and  $P$  the financial offer being considered.

The contract will be awarded to the tenderer whose tender achieves the highest total score for technical merit and price.

### 10.3.2 Lot 2 – Energy and environment:

#### A. Technical merit (TM) – 100 points maximum; 65 points minimum)

No	Criterion	Max Points	Min. Required
1.	Levels of understanding of the Agency’s demands and of the overall expertise offered to meet these demands covering all 6 fields specified under 10.2 (section III.2.3 of the contract notice); (both aspects are to be documented, field by field, in a reasoned summary statement as set out in Annex 3).	65	40
2.	Composition of the proposed team in terms of its geographic and linguistic coverage as well as its networking scope.	15	10
3.	Robustness and clarity of the project and quality management procedures to ensure timely delivery of consistent results according to the highest quality standards; (the approach to achieve that is to be documented in a reasoned summary statement as set out in Annex 4).	20	15

*Tenders scoring less than the required minima will not be considered further.*

#### B. Price (P)

Tenderers must quote all-inclusive daily rates for each of the required profiles (as defined in III.2. (technical and professional capacity) of the Contract notice), the total average of which as indicated below will be taken into account for the price evaluation:

Profile	EEA premises and within EEA-32 Daily rate (EUR) (X)	Contractor’s premises Daily rate (EUR) (Y)	Subtotal
Senior Consultant (SC)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
Junior Consultant (JC)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
Assistant (A)	... EUR	... EUR	$[(X+Y)/2]$ ... EUR
$\text{Total}_{AVG} (SC_{(X+Y)/2} + JC_{(X+Y)/2} + A_{(X+Y)/2}) / 3 =$			... EUR

*All fields are mandatory. Non-compliance leads to exclusion.*

Tenders meeting all mandatory requirements including the minima for technical merit will score points in function of the following formula:  $(P_{min}/P) \times 100$ , in which  $P_{min}$  being the lowest financial offer and P the financial offer being considered.

The contract will be awarded to the tenderer whose tender achieves the highest total score for technical merit and price.

## **11. Tenders**

Tenders must specify the Call for tender and the lot concerned, comprise a technical and a financial offer and be submitted in triplicate (one original and two copies to be submitted in one envelope).

Tenders should preferably be drafted in English. Supplementary material does not need to be translated.

Tenders must include:

- CVs with detailed description of relevant experience per lot and fields specified in 10.2 (section III.2.3 of the contract notice);
- For each of the principal similar services listed under 10.2 (section III.2.3 of the contract notice) a detailed description of tasks and responsibilities carried out by the tenderer must be included per lot and fields specified in 10.2;
- Reasoned summary statement per lot and field by field (Annex 3).

**For the purpose of evaluating tenders, tenderers are reminded that the mere repetition of requirements set out in the tender documents without providing the required levels of detail nor any added value will not lead to the award of merit points.**

Tenders from consortia of firms or service providers must specify the role, qualifications and experience of each of the members or of the consortium. The same requirements apply for subcontracting.

Submitting an offer implies acceptance by the tenderer of all terms and conditions of the draft contracts and their Annexes.

## **12. Environmental considerations**

The EEA runs a certified environmental management system (EMAS) and aims to minimise the environmental impact of all its activities, including those carried out under contract. The future contractor will, therefore, be requested to consider the EEA environmental management guidelines in the implementation of the contract, in particular, those relating to business travel/electronic means of communication, paper and

energy consumption. Further information on the EMAS system can be found on the EEA homepage: <http://www.eea.europa.eu/documents/emas>.

Moreover, it is strongly recommended that tenders are submitted in an environmentally friendly way, e.g., by choosing a simple and clear structure (list of contents and consecutive page numbering), double-sided printing, limiting attachments to what is required in the technical specifications (no additional material) and avoiding plastic folders or binders.

**Annexes:**

1. Declaration on exclusion criteria
2. Identification sheet
3. Reasoned summary statement related to technical award criteria A.1. (per lot and field by field)
4. Reasoned summary statement related to technical award criteria A.3. (per lot)