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INTERNATIONAL OPEN PROCEDURE, CALL FOR  
TENDERS FOR THE SELECTION OF CONTRACTOR  
FOR THE PROJECT

**“Conduction of market surveys, statistical analysis and  
methodology for the assessment of energy efficiency, in  
the final energy consumption”**

## General Information

<b>AWARD CRITERIA:</b>	The most economically advantageous proposal according to par.1a of article 51 of P.D. 60/2007
<b>BUDGET:</b>	<b>One million two hundred nineteen thousands and five hundred twelve Euros (1.219.512 €)</b> , plus VAT 23%, thus one million five hundred thousand Euro (1.500.000€).
<b>DURATION:</b>	22 months from signing the contract
<b>FUNDING</b>	The project is of national scope and is co-financed by the European Fund of Regional Growth (ERDF) and by National resources. Action included in the O.P. "Digital Convergence", (NSRF)
<b>FINAL DATE AND HOUR OF BID SUBMISSION</b>	dd/mm/2011, hh:mm
<b>DATE AND HOUR OF BID OPENING</b>	dd/mm/2011, hh:mm
<b>LOCATION OF BID SUBMISSION</b>	Centre for Renewable Sources and Energy Saving - CRES
<b>DATE OF DISPATCH FOR PUBLICATION:</b>	dd/mm/2011, hh:mm
<b>CONTRACTING AUTHORITY</b>	Centre for Renewable Sources and Energy Saving - CRES
<b>CPV CODE</b>	79930000-2 Special study services

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**PART A**  
**PROJECT OBJECTIVE**

The Centre for Renewable Energy Sources and Saving (CRES), under this invitation to tender, aims to award to a third party the project ***“conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption”***. This tender is foreseen within the framework of the national project, with the title “Information System to support the improvement of end-use energy efficiency in the framework of the Directive 2006/32”, awarded to CRES under the National Strategic Reference Framework (NSRF) 2007 -2013.

## **1. Reference Framework**

With the recently enacted Law 3855/2010, the Energy Services Directive (2006/32/EC) was transposed in the Greek legislation. L 3855/2010 on “Measures to improve energy efficiency in end-use, energy services and other provisions”, sets the national indicative target for energy saving until 2016 and describes the administrative and monitoring procedures as well as the energy efficient measures, in order to achieve the targeted savings. Additionally, it sets the framework for the establishment of the ESCO market in Greece through Energy Performance Contracts, the obligations of the energy providers for energy services and a set of initiatives especially for the public sector.

With the anticipated improvements of energy performance at end use, L3855/10 aims to contribute to all the National energy targets for restraining the carbon emissions and enhancing the level of security of energy supply. Moreover, the development of the energy services market will create conditions for more competitive and efficient market environment.

Having in mind the abovementioned legislative framework, as well as other national legislative initiatives related with the improvement of building’s performance (L3661/08, and “KENAK” the Energy Performance of Buildings Regulation) and promotion of cogeneration (L3734/09), the need to establish and operate a fully integrated information system in order to monitor and calculate the energy savings is evident. This monitoring, substantiation and finally assessment of the achieved energy saving is necessary for both the implementation of the Action Plan for Energy Efficiency and for monitoring the progress to the achievement of the national energy saving target for 2016.

In order to perform the assessment of energy savings, it is necessary to implement a calculation methodology, which will enable measurements of the achieved energy savings due to the implementation of energy efficiency measures. These calculated savings must be presented and documented at the following National Energy Efficiency Action Plans in order to monitor any given deviations in relation to the progress to achieve the final national energy saving target.

A prerequisite, in order to implement this calculation methodology, is the existence and documentation of data sets that will allow to measure, through calculations or estimations by energy models, the achieved savings.

For this purpose, the development of a dedicated information system for the assessment and monitoring of energy savings is needed in order to provide the necessary information, tools and findings for the monitoring process of the saving targets, the assessment and evaluation of the performance of existing and implemented measures for energy efficiency and the design of new if necessary in order to realize the targeted savings.

This information system is going to be essential in order to monitor the level of implementation and performance of the objectives for a set of legislative actions, besides the energy efficiency at end-use, that relate with the energy performance of buildings and the promotion of cogeneration.

The benefits from the operation of this information system are going to be also important for the market stakeholders (i.e. ESCOs, energy auditors, final consumers) as it will provide to them valuable tools for the support of their business or during the decision making process for adopting energy efficient solutions.

The key objectives of this information system are going to be:

- Analysis of the final energy consumption at all the end-use sectors
- Recording, mapping and updating of the necessary data for energy consumption and producing energy indexes
- Facilitate the energy planning for energy saving and cogeneration measures
- Monitoring, through energy models, of the programming, implementation and performance of energy efficiency measures.
- Support the development of the energy service market and share of energy efficient systems. In parallel provide information to the market stakeholders and consumers on the effectiveness of specific actions and availability of measures.

The project “Information System to support the improvement of end-use energy efficiency in the framework of the Directive 2006/32” will be implemented by CRES. The beneficiaries from the realization of this project are going to be:

- The energy division of the Ministry for Environment, Energy and Climate Change, whereas through the development of this information system will effectively monitor the progress of implementation of the national laws related with energy consumption at end-use and calculate the achieved energy savings.
- The enterprises and professionals active in the field of energy efficient technologies and cogeneration systems, as well as the physical entities that are going to enter in the energy service market.
- The final consumers of the residential, tertiary, industrial, transport and agricultural sector.

Upon the successful completion and operation of the information system, the update of the datasets and production of energy databases, which are all deliverables of the project, is going to be possible to use the findings for calculating the national performance in relation to the national indicative target for energy savings until 2016 and to measure the achieved energy savings. These findings are also going to be available for the public in order to be used for their awareness and information on energy saving aspects.

### **1.1. Contracting authority – CRES**

The Centre for Renewable Energy Source and Saving (CRES) is the national centre for Renewable Energy Sources, Rational Use of Energy & Energy Saving. Founded by Presidential Decree (P.D. 375) in 1987, CRES is supervised by the Minister of Environment, Energy and Climate Change (M.E.E.C.C) and has financial and administrative independence.



The mission of CRES is to promote RES/RUE/ES applications at a national level and under article 30 of L3734/2009; CRES facilitates the national energy planning, assists on the formulation of energy policies and fosters the development of research and development activities in the field of Renewable Energy Sources, Energy Saving and Combined Heat and Power.

Under this framework the support of MEECC by CRES, as stated also in detail, article 6 of law L3855/10, is referred mainly to elaboration of studies, action plans and national reports and to the technical advise and planning for the fulfillment of the national obligations that come from the adoption of the relevant EC directives in the fields of buildings energy performance, energy saving, renewable energy sources and cogeneration.

CRES uniqueness as regards the implementation of this work is justified from the following:

CRES is the only national institution with technical expertise on renewable sources, energy saving and the rational use of energy and has been technical supporting the country's energy planning.

CRES has contracted and implemented more than 50 relevant national projects with great success in the past.

CRES has contracted and implemented all the relevant projects in the framework of the Operational Programme of Energy [OPE] and the Operational Programme of Information Society [OP IS], under the third Community Support Programme. More specifically it has implemented the projects:

- OPE 3.4.9 “Information System development for the support of energy policy and energy planning decision-making”
- OPE 3.3.7 “Development of evaluation infrastructure for RES and EE technologies and integration of these into information systems”
- OPE 3.4.3. “GIS development for the Determination of the Technical and Economically Exploitable Potential of RES as regards electricity generation issues”
- OP IS 3.1.5 “GIS development for the Determination of the Technical and Economically Exploitable Potential of RES as regards thermal use”
- OP IS 3.1.5 “Integrated system of energy policy design”
- Development of an Action Plan for Energy Efficiency
- Assessment of the national potential for high efficiency co-generation

CRES has also successfully performed and assessed all the necessary energy calculations included in the 1st, 2nd and 3rd national reports on the energy planning of the country, that were completed in August 2007, in May 2008 and August 2009 respectively.

## 2. Tender objective

### 2.1. Scope

The present call refers to selecting a Contractor for the project **«conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption»**, which includes the development of statistical studies on the

consumption of energy at all end-use sectors (and per field of economic activity), where the data required will be parameterized in order to enable the measurement of energy saving, that is compulsory based on the Directive 2006/32/EC and that is defined in the transposing Law 3855/2010, which also places an indicative national objective for energy saving until 2016, through the application of measures for energy efficiency improvement.

These data are also essential for the determination of energy efficiency and for the development of National Action Plans for energy efficiency that are prescribed and requested by the Directive. The implementation of the project that the present call foresees the conduction of statistical studies, with simultaneous treatment and incorporation of weighted data from existing or future inventories and surveys of official national institutions.

This project aims to deliver a statistical method for the collection and parameterization of required data in order to monitor the energy savings, which are achieved through Energy Efficiency improvements, and/or the penetration of small-scale RES technologies, in the final energy consumption sectors of Greece.

The methodology for collecting, assessing and analyzing these data is necessary to evaluate and monitor the achievement of national energy saving targets.

Furthermore, the main objective of this project by designing and conducting the necessary statistical studies is to collect and process all the necessary data, so as to evaluate the already implemented measures to improve energy efficiency and measure the qualitative and quantitative figures of energy conservation in all the sectors of final consumption.

## **2.2. Project objective**

The project **«conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption»**, includes the identification, collection, recording and statistical treatment of essential data, as these are described in fields **a** to **e** of section 2.3.2 of the present call.

First of all, surveys for collecting final energy consumption data for all end-use sectors are required. Then, the collected and existing data must be used for the design of an integrated database and finally for the generation and organization of completed datasets fully mapping the energy demand of the country. Thereafter, the successful completion of these deliverables will lead to the establishment of an effective monitoring system for energy efficient technologies and their penetration/contribution to the final energy consumption in Greece.

### **2.2.1. Location of the project**

The project will be implemented in Greece and refers to actions throughout the Greek territory.

## **2.3. Field of Application**

The Contractor shall ensure that the application of the proposed methodology for the monitoring process of the national energy savings in reference with the database that will be designed and developed succeeds in providing all the necessary data fields in order to perform the calculations for energy savings and the assessment of energy efficiency measures, according to the general framework of operation and application of the information system, as described in Chapter 1 of PART A hereof.

The market surveys and the statistical data processing must incorporate an analysis according to the geographical distribution, the economic activity, the type of end use, the climatic conditions and any other special features that require quantitative and qualitative assessment in order to define the energy savings.

Regarding the data collection methodology, the process for collecting data and developing the organization and ultimately producing a full range of statistical data should be designed and eventually implemented in order to be able to record and monitor the following items:

- energy demand
- energy efficiency
- CO<sub>2</sub> inventory.

Furthermore, a proposal should be delivered for a specific networking system for data collection enabling the relevant official bodies, as well as the existing official sources for data elaboration, to act so in the future. The design, elaboration and analysis of specific market surveys (2.3.3), which are of paramount importance should ensure the collection of the necessary data, as described in section 2.3.2 (fields a to e). Moreover, the surveys must ensure the generation of completed and integrated datasets and their compatibility with the developed database and the overall objectives of the tender.

### **2.3.1. Methodology of the proposed work**

In order to achieve the objectives of this tender, the Contractor should describe and consider the implementation method of the following actions:

- i. Development of a method for the standardization of the process for the collection, management and statistical analysis of required end-use data for the assessment and calculation of energy savings (including development of regulations for data collection and prototypes for questionnaires). This method should be compatible and fully comply with the relevant standards for calculating the energy savings, which are under development by the EC. It should be mentioned that emphasis should be given to the development of the methodology for establishing the monitoring system for the transport, tertiary and residential sectors, for which the conduction of market surveys is also foreseen in this project.

Moreover the proposal should additionally include the procedure in order to achieve:

- Review of methodologies used at national level to collect data and assess final energy consumption
- Identification of missing data and uncertainties in order to ensure the evaluation quality as well as the degree of sample reliability.
- Quality control of collected/used data. The proposed methodology should be fully documented, to ensure the completeness and accuracy of the data.

The development of the method in question should be done taking into consideration the institutional and regulatory framework in Greece, both with respect to the energy market and to the obligations of the organizations involved in the market, in order to ensure the reliability and continuity of the process of energy data collection.

Moreover, the European Energy Statistics Regulation 1099/2008 must be taken into consideration and the proposed method should incorporate entirely the requirements of the above Regulation concerning the sources and the means of data collection, as well as statistics which should be submitted at set intervals.

- ii. **Design and conduction of market surveys.** The planned market surveys must be focused on data collection and have to provide the necessary data that will be used for assessing the effectiveness of the implemented energy efficiency measures. These surveys should be planned in a way to act supplementary to the monitoring procedure of the targets and the methodology that is going to be developed.
- iii. **Elaboration and monitoring of statistical studies** with quantitative and qualitative parameters available in the market, in order to provide input for the proposed methodology and to complete the missing data.
- iv. **Design and evaluation of methodology** for measuring energy consumption and calculating the energy benefits of implementing the proposed measures for energy efficiency, according to the methods of the European Commission. It should be ensured that the double counting of energy benefits of the proposed measures is avoided during the implementation of the proposed methodology.

These actions are targeted to provide CRES with the necessary tools in order to implement the best monitoring procedure for assessing the achievement of the national target for Energy Efficiency related to ESD and to design additional measures for improving the Energy Efficiency, when necessary.

During the entire period of the project, the Contractor will perform scheduled meetings (6 times per year) with the monitoring team of CRES in order to discuss the progress of the project. The monitoring team of CRES will have the right to request extra, unscheduled, meetings with the Contractor. In any case, the frequency of the regular meetings will be discussed between the Contractor and the monitoring team of CRES with the latter taking the final decision, if necessary. The meetings will take place at CRES's premises, unless otherwise specified.

### 2.3.2. Characteristics of the datasets

The foreseen datasets have to provide full mapping of the energy demand of the country and will be used as input in:

- the energy models that are elaborated by CRES (ENPEP, MARKAL) and provide scenarios for the evolution of the national energy system, the energy demand per sector and use of technology
- information systems developed and operated by CRES depicting the evolution of national energy data system
- the direct monitoring of the effectiveness of policy measures towards the achievement of targets related to increasing energy efficiency.

The exact design of the contents of the statistical series to be produced will be finalized in the framework of the project's implementation, during the project's analysis and design. The final structure, however, should satisfy the abovementioned three requirements.

#### **Produced datasets must include the following information:**

a) "Activity" data for each sector (stock of buildings in m<sup>2</sup> per sub-sector, dwellings, number of vehicles, etc).

b) Macro-economic data (for example: product) that are necessary for each sector.

c) Of the required data:

- Detailed final energy consumption per sector and final use (for example breakdown of vehicle sales per fuel type, energy consumption in households per final use, etc)
- Specific or per unit data on energy consumption (sources: surveys, audits, energy certificates, etc).

d) CO<sub>2</sub> emissions coefficient in relation to the total final energy consumption

e) Data for energy efficient equipment and/or best available systems: energy efficient electrical appliances class A/ A++, energy efficient buildings (Class A), CFL or LED lamps, heat pumps, EPC, VAs, etc.

The completed and integrated datasets are the necessary input data in order to perform the evaluation of energy efficiency measures and the monitoring of energy savings in all different sectors of end-use. For this reason, the datasets should encompass the national framework for the end-use sectors and consider the local characteristics.

The structure of the datasets, as they will be used for the entire period of observation of the national energy saving targets, should be adjusted to provide annual and comparative information, have all the required fields for calculating energy efficiency indicators and integrate all internal control fields to ensure maximum reliability of data.

### 2.3.3. Survey implementation

The Contractor should review the existing data collection/surveys, report on specific data gaps and propose specific strategies for new surveys that will be able to provide the necessary input for the monitoring system and the database.

The proposed surveys should be fully justified and correlated with the proposed methodology and will be evaluated on a cost-effectiveness basis.

The market studies/surveys have to ensure that the sample of final consumers that was selected for each region of country is representative and sufficient for the extraction of reliable conclusions, as far as both the geographic distribution of consumers and the categorisation of energy consumption.

The time interval of data recording should be such so that it takes the seasonality of consumption into consideration, wherever required, while the survey as regards the stock of appliances, products and vehicles must follow the categorization according to national or international relevant regulations.

The coherence of the new proposed surveys with existing ones will be also evaluated.

Based on the diagnosis of the existing group of surveys, it is proposed that the Contractor elaborates surveys that will provide data related with the following categories:

- cars / specific consumption
- trucks / specific consumption
- Public transport
- tertiary sector/ specific consumption, with additional breakdown in sectors with high national interest (for example public buildings, hotels)
- residential sector / specific consumption and consumer habits and profile for electric appliances, stock of residential energy consumption systems
- penetration and use of small-scale residential renewable energy systems for heating / cooling
- agriculture, analysis/breakdown of energy consumption by types of use

***a) Surveys' characteristics***

The Contractor should provide comprehensively the characteristics of the proposed methodology in relation with:

- The sample size
- The level of accuracy of the results
- The sample representativeness
- Type of methodology for data collection (post mailing, phone interview, households or companies panel etc)
- Type of results based on the provided data list

The Contractor should emphasize on ensuring that the survey design allows easy updating and has good condition of replication and sustainability of the monitoring system. Within

this scope, the Contractor should propose specific timeframes and periodicity for implementing the surveys.

The proposed strategy for surveys should include a detailed survey cost allocation (e.g. cost of the survey split by staff, questionnaires, questionnaire checking, data processing, presentation of results). The Contractor must also explicitly mention the ownership and use of the individual raw data.

In the framework of the project and according to the findings of the analysis of the current situation of final energy consumption data collection and the requirements of the monitoring methodology that will result from work package WP1, there should be flexibility for the design of the proposed surveys between the Contractor and CRES. In specific, depending on the quality of the existing data, the new and proposed surveys have to focus on data collection in the optimal technical-economical way.

Any changes, however, will not affect the type of the targeted end-use sectors for conducting the surveys (tertiary, transport, residential, agriculture), but the specific level of detail, data analysis criteria and statistical parameters to be used.

## ***b) Planned surveys per sector of final energy consumption***

### **1. Transport Sector**

The objective of the planned survey is to provide a breakdown of the road fuel consumption based on sales by vehicles types (Cars, Bus, LDV, trucks, bus)

The Contractor should propose (and conduct during the project) a survey able to provide solid estimates of the breakdown of fuels by road vehicle type. This survey can be complemented by more specific surveys like the following:

#### **Cars:**

- On road consumption/ unit consumption by fuel type, by power, by age, by region, by vehicle use
- Fuel consumption of vehicles not registered in the registry of the Ministry of Transport (goods freight, tourism)

**Trucks:** specific consumption and consumption by load capacity/weight, activity/ type of transported goods

The surveys should ensure coherence between the stock of vehicles, the mileage and the consumption data.

### **2. Tertiary sector**

The tertiary sector requires the design of an integrated survey that will incorporate all the necessary information for energy consumption data collection, focusing on the

characteristics of the Greek tertiary sector and the priorities of the sector as they appeared in L.3855/2010 (exemplary role of the public sector).

In this framework, the Contractor is called to proceed with the design and conduction of a representative survey at national level, with conditions of intra-period assessment following European nomenclature of activities, in order to record and analyze energy consumption.

In specific, this survey should focus on the collection, treatment and finally providing of data on specific (per surface) and total energy consumption per:

- Fuel types including high-efficiency cogeneration
- End use (space heating, cooling, hot water, cooking, lighting, other specific electricity use, cooking, etc)
- Branch (offices, commerce, hospital, hotels, education, public buildings, tourism)
- Age of buildings
- Region
- Climatic zone

Moreover, for the specific sector a proposal to conduct additional survey for a particular sub-category of the tertiary sector, may be asked, if the Contractor and CRES agree on the necessity, always in the context of the budget which was awarded for the project.

These surveys should be compatible and take advantage of existing information. The objective is to produce a cross-sectoral detailed energy consumption analysis and balance through modelling based on the survey results and others existing sources.

### **3. Residential sector**

These surveys should be compatible with and take advantage of existing information, both from national surveys (census, household budget), as well as sectoral ones that have been performed by private entities.

The objective is to complete the existing housing surveys, census and on going surveys related with household budget, to get additional information, in particular on consumption and specific energy consumption as well as their relevant breakdown (see above), to provide a reliable picture of the stock and the use of household appliances, to record the penetration of residential renewable energy systems for heating/cooling, and to produce a sectoral detailed energy consumption analysis and balance for households through modelling based on the survey results and others existing sources.

In specific, a representative survey at national level shall be designed and developed and will include, where possible, evaluation methodology for previous years based on European categories of activity in the households, in order to record energy consumption and the stock of equipment and systems used by residential consumers.

Additionally, this survey shall be designed by the Contractor in sufficient time to incorporate any energy savings that would result from implementing energy saving measures in the residential sector or by participating in relevant national programmes (e.g. Energy Performance of Buildings Regulation, for new buildings, national program for energy savings in households) and to focus on qualitative characteristics of consumer preferences, and on household equipment.



The implementation of this survey, since it is expected to coincide with a national survey on household budget, which will include the recording, mapping and charting of energy characteristics and will be combined with specific consumption, should actually provide extra information and added value through the collection and analysis of consumer habits from the retailers of household appliances and systems, the savings achieved through implementation of measures to improve energy efficiency, and the consumers preferences and how they are affected by non-technological actions.

Items that should be identified through the surveys, correlated with energy consumption:

- Analysis of consumer attitudes
- Results from the implementation of energy saving measures and programs in households
- Analysis of the stock of electrical appliances and air conditioning systems
- Stock, characteristics and use of residential renewable energy systems for heating and cooling
- Breakdown of final consumption by type of use (heating, cooling, hot water, cooking, lighting and other uses of electricity, electric appliances)

#### **4. Agriculture**

In the framework of this project, a survey for the agricultural sector is foreseen with the aim of recording and processing energy and fuel consumption in the individual agricultural procedures.

Specifically, a representative survey should be designed and developed at national level and will include, where possible, evaluation methodology for previous years, based on European categories of activity in the agricultural sector, in order to identify the energy consumption of the following sub sectors:

- Irrigation
- Tractors
- Greenhouses

### **2.4. Work Packages [WP] – Deliverables [D]**

The project includes the following work packages, which are connected with associated deliverables of the project:

#### **2.4.1. WP 0: Project Management**

The Contractor should pay special attention to the project management of this contract and in particular with regard to individual deliverables and timelines related to project implementation. In specific, it is necessary to overcome effectively and timely all administrative and managerial obstacles that may arise during the implementation of individual deliverables. A critical parameter is the coordination of various working groups within the working team of the Contractor, as it is required to follow specific timetables and implement simultaneous and mutually dependent actions (according to timetable 2.4.10).

In this framework, the Contractor shall prepare and deliver progress reports on the progress of the work of this tender, where it will be described in detail any deviation from the original approved schedule, corrective actions and decisions, minutes of meetings held in the reporting period, as well as detailed presentation of the deliverables that have been implemented by this time.

The Contractor has to provide 3 progress reports (PR), which concern the following:

- 1<sup>st</sup> progress report, with the completion of the Deliverables (D1-D4), describing in detail all aspects of organization and activities of the project, updating the original schedule and planning of the next actions. In the progress report there should be a concise description of the individual deliverables of the relative period.
- 2<sup>nd</sup> progress report, with the completion of the Deliverables (D5-D11), where an update of the schedule should be done as well as the planning of the next actions. In the 2<sup>nd</sup> progress report there should be a concise description of the individual deliverables of the relative period, which concern mainly conducting the statistical surveys.
- 3<sup>rd</sup> and final progress report, with the completion of all the Deliverables, describing in detail all aspects of organization and activities of the project, the issues raised during the project, individual corrective actions as well as a detailed presentation of the final results of the project. The final progress report should include also a brief description of each deliverable (D12-15) relating to the last period and the completion of the project.

#### **2.4.2. WP 1: Design of a pattern system (methodology) for energy data collection and processing**

This deliverable requires the development of a methodology, which will incorporate the requirements for the collection of all the necessary energy data that will be obtained by the procedures described in Chapter 1 of this document. This system must also calculate basic energy indicators related to energy efficiency measurements and targets, as described in the first Greek NEEAP.

The proposed methodology shall allow the calculation of:

- annual energy savings with energy efficiency indicators “Top - down calculation” (T-D)<sup>1</sup> at detailed end-uses levels
- annual energy savings by a “bottom-up calculation” (B-U)<sup>2</sup> model analysis. The B-U analysis will interact with the database that will be created in order to be able to carry out an impact assessment of the measures described in the first NEEAP.
- the achieved CO<sub>2</sub> emissions reduction, in reference with the specific energy savings in the end use sectors.

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<sup>1</sup> A top-down calculation method means that the amount of energy savings is calculated using the national or larger-scale aggregated sectoral levels of energy savings as the starting point (according to DIRECTIVE 2006/32/EC)

<sup>2</sup> A bottom-up calculation method means that energy savings obtained through the implementation of a specific energy efficiency improvement measure (according to DIRECTIVE 2006/32/EC).

Moreover, evaluation of energy efficiency policies may be performed through existing energy models used by CRES (ENPEP, MARKAL) or other end-use B-U models. For this reason, data collection and indicators should take into account the needs of data entry for these energy models.

This methodology has to be delivered with instructions and a full explanation of the parameters and equations used in the computational process of indicators and the evaluation of energy efficiency measures. Moreover, it must be fully compatible with the database that will be developed during the project.

Finally, the delivered methodology must be adjustable in order to be extended for future development of additional data and be capable of being used without requiring additional equipment or approvals and licenses by the Contractor.

**WP 1 DELIVERABLES:**

1. D1: Development of a methodology for data retrieve and processing
2. D2: Guidelines for the application of the methodology for data retrieve and processing

**2.4.3. WP 2: Mapping and analysis of the current state for energy data collection, concerning final energy consumption.**

This deliverable requires a complete inventory of the sources that energy data are collected at national level and the correlation between the obligations of parties that are responsible for providing such information with the required data, since it has to analyze the quality of both existing and desired information.

**WP 2 DELIVERABLES:**

3. D3: Table of data collection sources
4. D4: Quality control of the available datasets

**2.4.4. WP 3: Data collection methodology**

In this WP, the Contractor is required to describe in detail the way that the data are collected and the sources of these data, for both existing and new data coming from new surveys, for the purpose of this project. This description must be done for all of the fields of the database. **WP 3 DELIVERABLES:**

5. D5: Data collection methodology

**2.4.5. WP 4: Design of surveys in specific sectors of final energy consumption**

This WP includes the development of questionnaires according to the needs of the monitoring system for energy targets. Additionally, it shall describe the developed methodology for the surveys, the method for statistical analysis which will ensure the best relation between the sample size and the cost of the survey. Finally, it must present clearly the way that the interviewers will be trained.

**WP 4 DELIVERABLES:**

6. D6: Market surveys' questionnaires
7. D7: Methodology for the conduction of market surveys

#### **2.4.6. WP 5: Conduction of surveys in specific sectors of final energy consumption.**

The surveys will focus on the tertiary sector (private and public), transport and the residential sector (according to data gaps that have been detected in WP2). An Individual survey for agriculture is foreseen, based on economic criteria, and it will be an extra criterion of the tenders' evaluation process.

The survey in the tertiary sector and transport should cover all sub-sectors, and a specific survey for the public sector should be made (types of buildings and public transport), because in accordance with L.3855/10, the public sector should play an exemplary role and a complete record of its energy consumption is needed.

In section 2.3.3 of the present call, the mandatory planned surveys are described in detail. However, since a list of sectoral / technological parameters are also mentioned, in case that the Tenderer, proposes new targeted surveys, based on techno-economical analysis within the total estimated budget, this will give an advantage to the Tenderer and will add positively to the award of the tender.

##### **WP 5 DELIVERABLES:**

8. D8: Tertiary sector's market survey(s)
9. D9: Transport sector's market survey(s)
10. D10: Residential sector's market survey(s)
11. D11: Agriculture sector's market survey(s)

#### **2.4.7. WP 6: Primary data processing from surveys and provision of total energy data information.**

WP6 foresees initial processing of raw data in accordance with the needs of data sets generation, while the compatibility of data sets with the database, must be taken into account, as the datasets will be the input for the database. Moreover, according to the type of answers, a quality control of statistical data and records of distributions must be done.

The internal control system that should be incorporated, should result that in case of failure of the statistical requirements and restrictions (described in WP4), the surveys will be completed by adding to the sample/surveying new respondents.

##### **WP 6 DELIVERABLES:**

12. D12: Quality control results of the datasets

#### **2.4.8. WP 7: Organization and provision of final datasets**

The datasets must include all the data that are mentioned and described in this document. The datasets must be compatible with the database settings and it must be ensured that they are easily processed by the relevant software that is linked with the database.

The main goal of this work package is the generation and organization of completed data sets according to the parameters that are described in chapter 2.

The data sets should be based on:

- a) processed data from existing census, surveys and statistical surveys
- b) data from the surveys that will be implemented and performed in the framework of this project.

The deliverables of this WP are related to datasets, which must include:

- Data in a common format of data tables (.csv, .xls, .dbf format) or in an other recognized database or database output.
- Analytical description and metadata.

**WP 7 DELIVERABLES:**

13. D13: Provision of integrated and final datasets
14. D14: Description and metadata of datasets

**2.4.9. WP 8: Complete proposal for collection of data at national level and proposals for specific integration of information in relevant bodies.**

This WP must deliver a complete monitoring system and methodology for collecting final energy consumption data, taking into account the results of WPs 1-7. Moreover, the individual points that need to be launched must be analysed in order to achieve the optimal techno-economical development of an integrated system for data collection.

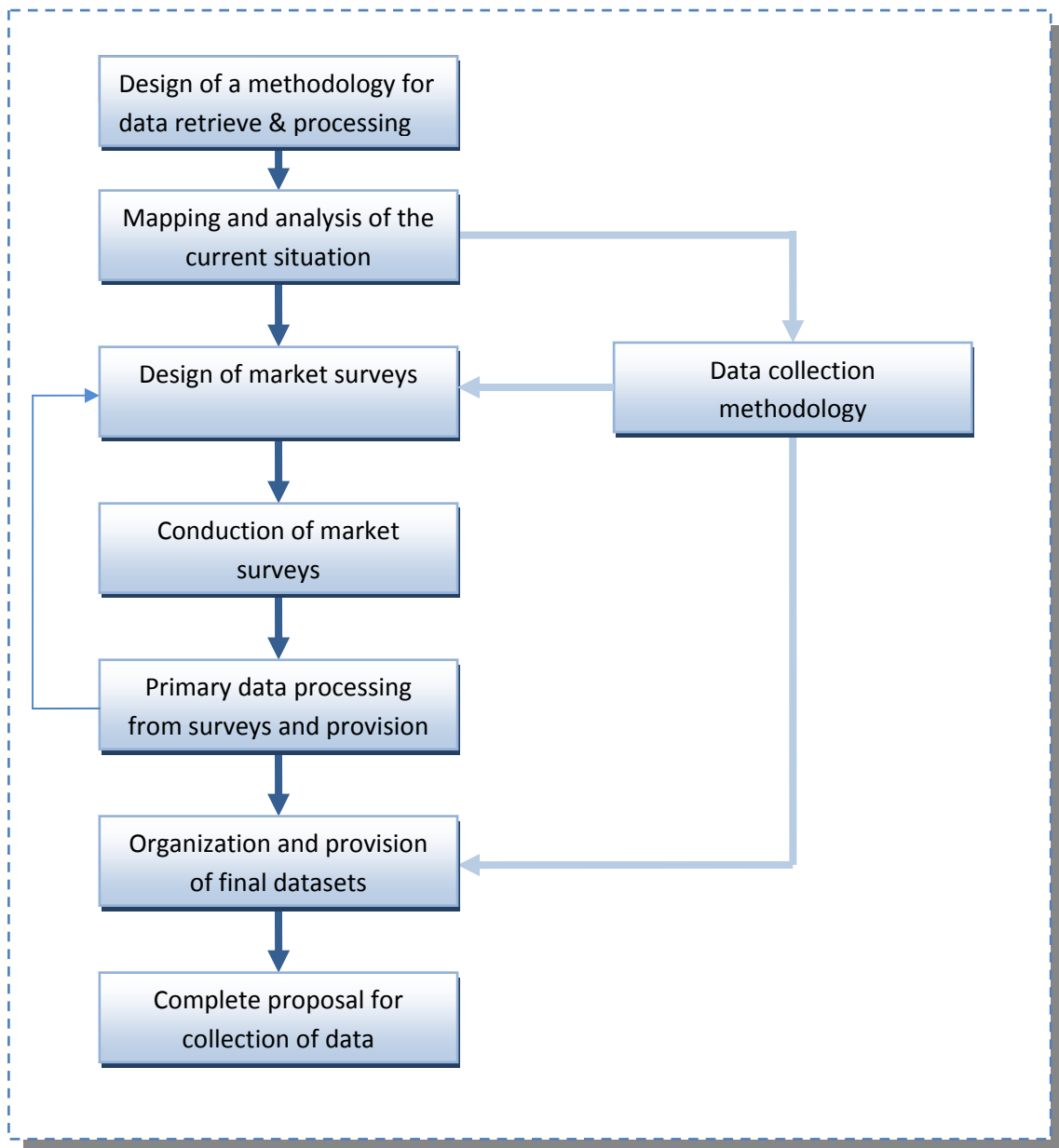
The deliverable must take into account all additional institutional changes in energy issues, in obligations, even if they do not have already been applied.

The development of specific flow diagrams for data collection for each sector, energy product and type of energy efficiency measure, according to the first NEEAP, should be included in the deliverable, with simultaneous presentation of techno-economical requirements for their development.

**WP 8 DELIVERABLES:**

15. D15: Final Guide for the development of a Data Collection System

#### 2.4.10. Flowchart of implementation activities (work packages)



### 3. Project Duration - Budget

#### 3.1. Project duration

The duration of the project is 22 months. The maximum time for implementing the project is set at twenty two (22) months from the signing of the contract. An indicative overview timetable for the implementation of the project per WP follows bellow:

WORK PACKAGES	MONTHS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
<i>WP 0: Project Management</i>																							
<i>WP 1: Design of a methodology for data retrieve &amp; processing</i>																							
<i>WP 2: Mapping and analysis of the current state</i>																							
<i>WP 3: Data collection methodology</i>																							
<i>WP 4: Design of market surveys</i>																							
<i>WP 5: Conduction of market surveys</i>																							
<i>WP 6: Primary data processing from surveys and provision</i>																							
<i>WP 7: Organization and provision of final datasets</i>																							
<i>WP 8: Completed proposal for collection of data</i>																							
<b>Deliverables</b>																							
<b>Progress Reports - Final Report</b>																							

Additionally, a detailed table presenting Deliverables (D) in relation with work packages (WP) and month of completion follows below.

D	Title	WP	Month of completion
D1	Development of a methodology for data retrieval and processing	WP1	5 <sup>th</sup> month
D2	Guidelines for the application of the methodology for data retrieval and processing	WP1	5 <sup>th</sup> month
D3	Table of data collection sources	WP2	6 <sup>th</sup> month
D4	Quality control of the available datasets	WP2	6 <sup>th</sup> month
D5	Data collection methodology	WP3	8 <sup>th</sup> month
D6	Market surveys' questionnaires	WP4	15 <sup>th</sup> month
D7	Methodology for the conduction of market surveys	WP4	15 <sup>th</sup> month
D8	Tertiary sector's market survey(s)	WP5	17 <sup>th</sup> month
D9	Transport sector's market survey(s)	WP5	17 <sup>th</sup> month
D10	Residential sector's market survey(s)	WP5	17 <sup>th</sup> month
D11	Agriculture sector's market survey(s)	WP5	17 <sup>th</sup> month
D12	Quality control results of the datasets	WP6	18 <sup>th</sup> month
D13	Provision of integrated and final datasets	WP7	21 <sup>st</sup> month
D14	Description and metadata of datasets	WP7	21 <sup>st</sup> month
D15	Final Guide for the development of a Data Collection System	WP8	22 <sup>nd</sup> month

### 3.2. Budget

The maximum budget amounts to **one million two hundred nineteen thousands and five hundred twelve Euros (1.219.512 €)**, plus VAT 23%, thus one million five hundred thousand euro (€ 1.500.000) including VAT.

### 4. Contractor Selection Process - Award criteria

The selection of the Contractor who will provide services will be held with open procedure, as defined in paragraph 11a of Article 2 of the Presidential Decree 60/2007.



Award criterion is that of the "most economically advantageous tender" according to paragraph 1a of Article 51 of Presidential Decree 60/2007.

## **5. Contractor's structure and requirements on competencies**

### **5.1. Contractor's structure**

Tenderers (private, legal entities, groups of companies, consortiums etc), who wish to submit their fully binding Tenders, should demonstrate (themselves alone and not through their potential subcontractors) significant specialized experience in the field of the project, of at least the last ten (10) years in Greece or abroad, as well as availability of highly skilled and expert personnel to be assigned to the project.

In specific, tenderers have to meet the requested professional experience and adequacy, as well as proven competencies in the following fields:

- Energy Policy Analysis
- Design and implementation of measures that incorporate energy performance criteria
- Energy Statistics
- Energy Information Systems
- Data mining & analysis
- Market Studies
- Software Development and Customization

Tenderers should also explicitly indicate in their Tender any part of the project they may intend to assign to third parties, such as subcontractors. In the latter case, the experience of any potential subcontractor cannot in any case substitute the principal economic operator's (tenderer's) requested liability and experience.

The tenderer that will be awarded with the contract for the project implementation should form the following working team:

1. Project Manager (PM): s/he will have the overall responsibility for the actions of the Contractor.
2. Project Team (PT): a Project Team will be formed and will, under the guidance of the PM undertake individual responsibilities and tasks in the framework of the project.

### **5.2. Requirements on the Competencies of the Project Team (PT) members**

#### **5.2.1. Project Manager**

The Contractor designates the Project Manager( PM) who will supervise the project's overall technical progress and be responsible for the financial and project management. The PM will have to be an experienced scientist, hold a postgraduate degree, have at least ten years of experience and active involvement into fields that are relevant to the project, as described in the present call (Part B section 2.1.2) and, in specific, into topics referring to energy policies' analysis and use of energy indices for monitoring final energy consumption.

Thorough understanding of the functioning of EC's structural policies, the legislative framework as well as familiarity and acquaintance with information systems will be taken into consideration and evaluated accordingly as well.

### **5.2.2. Project Team**

The Contractor will have to form a Project Team, which will comprise at least six (6) experts to ensure the timely and of high quality project implementation.

The suitable Project team of the Contractor, comprises experts with proven competencies for the:

1. accomplishment of the project's overall activities as described in PART A, Chapter 2 hereof and according to the experience competencies referred in PART B section 2.1.2 hereof.
2. treatment of issues regarding statistical evaluation and raw data elaboration
3. application of methods and performance of statistical research required for the project implementation

At least three members of the Project Team should hold a postgraduate degree and have five-year experience in the aforementioned activity fields.

## **6. Information on the tendering procedure**

An issue of this present tender document can be collected from the CRES' premises in Greece (19<sup>th</sup> km Marathonos Avenue, GR 19009, Pikermi, Greece, PROCURMENT DPT)

The provision of the tender's declaration is done by the Procurement Department of CRES, 19<sup>th</sup> km MARATHONOS AVE., Pikermi 190 09, tel 210-6603300 (fax. 2106603301). The competent official to contact is Mr. ...., until ....., during working days and hours from 10:00 a.m. to 13:00 PM

The delivery of the tender's declaration is done in person or by courier (with responsibility and expenses of the Tenderer). In case the delivery of the Declaration is done by courier, CRES has absolutely no responsibility for the timely and proper delivery of the tender's declaration. The recipients of the tender's declaration should complete a form with details of stakeholders (such as name, occupation, address, zip code, phone, fax, email) so that CRES has at its disposal a complete list of those who received the Declaration/Tender, in case CRES would like to send them any additional documentation or clarification. For any deficiencies in the completion of the details of the aforementioned form the responsibility rests with the candidate.

Recipients of the tender's declaration shall verify that the Declaration/Tender is complete according to the table of contents and the total number of pages, within three (3) working days from delivery. In case they find any omission/ failure, they should notify CRES in writing and request a new full copy. Protests against the legitimacy of the tender on the grounds of incompleteness of the received copy of the tender's declaration will be rejected as unacceptable.

a. The Tenderer may request in writing clarification of the Tender documents at any time up to twelve (12) calendar days prior to the tender due date to CRES's office which is named at the publication text. The contracting authority (CRES) will endeavor to reply to the requested clarifications, which will be supplied simultaneously to all Tenderers. No interested party may, in any case, rely on verbal responses from CRES staff. Any communication in connection with this Tender is in writing.

b. After the proposals have been opened any clarifications, modifications or corrections on clerical errors in the tender are not considered and they are rejected as unacceptable.

**PART B**

**GENERAL TERMS OF THE TENDER**

## Legislative and Regulatory Framework of Tender

The tendering procedure will be conducted in accordance with legislation, particularly in accordance with the provisions of:

1. Procurement Rules of the Centre for Renewable Energy Sources and Energy Saving (CRES) (MD6409(ΦOP)1250/OG 489, Issue B', 28 06.1994), as far as it is not inconsistent with the PD 60/2007 on the adaptation of Greek legislation with the provisions of Directive 2004/18 EC on the "coordination of procedures for awarding public works and services contracts", as amended by Commission Directive 2005/51/EC and Directive 2005/75/EC of the Parliament and the Council of November 16, 2005.
2. L.2286/1995 of public sector procurement regulations and related issues and specifically Article 1, Paragraph 5 II items A, D and E.
  - 2.1 L.2362/1995 Public Accounting, control of state and other provisions.
  - 2.2 P.D. 118/2007 (OG 150/10-7-2007) "Rules on Public Procurement (RPP)
  - 2.3 L.2522/1997 (OG. 178/A'/8.9.1997) On judicial protection at the stage preceding the award of public works, public procurement and services contracts
  - 2.4 Directive 2007/66/EC "amending Directives 89/665/EEC and 92/13/EEC with regard to improving the effectiveness of review procedures concerning the award of public contracts"
3. P.D 60/2007 (OG 64/A/16.3.2007) adapting Greek legislation to the provisions of Directive 2004/18/EC on "the coordination of procedures for awarding public works and services contracts" as in force.
4. Directive 2004/18/EK "for the coordination of procedures for awarding public works and services contracts".
5. Article 98 paragraph 1b of the new 2001 Constitution, relating to control of contracts of great economic value, where one party is the government or another entity in lieu of the government in this regard, as specified by law.
6. P.D. 82/96, delegated by L. 2328/95), "Nominalization of shares of Greek limited liability companies involved in the process of undertaking projects or commissions of the State or legal entities of the public sector".
7. P.D. 774/1980, article 19, paragraph 7, as in force.
8. L.3310/2005, "Measures to ensure transparency and prevent fraud in the procurement process", as amended by L.3414/2005 (OG 279/A/10.11.2005).
9. P.D. 166/2003 (OG 138/A 5/6/2003), "Adaptation of the Greek legislation to the Directive 2000/35 of 29/6/2000 on combating late payment in commercial transactions".
10. The decision taken on the ..... Meeting of the Board of CRES on .....  
..... 2011.

## **1. Nature of the contract**

The present invitation to tender concerns the selection of a Contractor for the implementation of the project entitled "Conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption", with reference number CPV 79930000-2, Special study services.

## **2. General Terms of participation**

### **2.1.1. Eligibility of participation**

Participation in this invitation to tender is open on equal terms to all natural and legal persons (including each member of a consortium and subcontractor if applicable) operating legally at least for the last five (5) management/financial years and:

- reside in the Member States of the European Union or
- reside in the Member States of the Agreement on the European Economic Area (EEA) or
- reside in the Member States which have ratified the Plurilateral Agreement on Government Procurement (GPA) concluded within the WTO, which was ratified in Greece with the L.2513/97 (OG A'139), on the condition that the contract falls under the terms of that Agreement, or
- reside in third countries which have concluded European Agreements with the EU or have been formed according to the state law of a EU Member State or of an EEA Member State or of GPA signing state or of the third country which has concluded an agreement with the European Union and have their central administration or principal place of business or office inside one of the above countries that meet the conditions laid down in Article 8
- do not fall within the prohibitions of Article 4 of Law 3310/05 as amended with Law 3414/05.

Associations/Consortia making a joint tender are also eligible to participate and must fulfill the following:

- That the percentage of participation of each person in the project, the specific part of the project to be undertaken by each person, the legal representative of each member and the common representative of the Association are explicitly written down.
- The cooperation method of the members during the project is presented.
- At least one member of the Association/Consortium should meet the minimum entry requirements. Exceptionally, the requirement for at least five years of operation mentioned above is covered separately by all members of the Association.
- That each member of the Association/Consortium operates legally in Greece or in another Member State of the European Union (EU) or European Economic Area (EEA) or in third countries that have signed the Agreement on Government Procurement of the World Trade Organization, approved by Law 2513/1997.

Associations of persons are not required by the Contracting Authority to assume a specific legal form in order to submit a proposal. However, if the contract announced in this project

is awarded to associations, the Contracting Authority may, as long as it considers it necessary for the satisfactory performance of the contract, ask the association to adopt a particular legal form and the Association in this case must do so.

### **2.1.2. Proven experience**

Contractors (private, legal entities, groups of companies, consortia etc) wishing to submit their fully binding Tenders should demonstrate (themselves alone and not their potential subcontractors) significant specialized experience in the field of the project, for at least the last ten (10) years in Greece or abroad, as well as availability of highly skilled and expert personnel to be assigned to the project.

In specific, Contractors have to meet the requested professional experience as well as adequacy, proven skills and expertise in the fields given below:

- Energy Policy Analysis
- Design and implementation of measures that incorporate energy performance criteria
- Energy Statistics
- Energy Information Systems
- Data mining & analysis
- Market Studies
- Software Development and Customization

Contractors should also indicate in their tender any share of the project they may intend to outsource to third parties as subcontractors. In the latter case, the experience of any subcontractors cannot substitute the credibility and experience of the principal economic operator (Contractor).

## **3. Exclusion of Candidates**

In the tendering procedure the following are not accepted:

- Tenderers that fall under the categories listed in Article 43 of Decree 60/2007, i.e. a final conviction, which is known by the contracting authority, has been sentenced against them for one or more of the following reasons:
  - a. Participation in a criminal organization, as defined in Article 2 paragraph 1 of Joint Action 98/773/JHA
  - b. Bribery, as defined in Article 3 of the Act of 26 May 1997 and Article 3 paragraph 1 of Joint Action Council 98/742/CFSP
  - c. Fraud within the meaning of Article 1 of the Convention on the protection of the European Communities
  - d. Money laundering, as defined in Article 1 of Directive 91/308/EEC of 10 June 1991 on prevention of use of the financial system for money laundering.

- Those who were finally excluded from tendering for public procurement as defined in Article 34 of Decree 118/2007.
- Those who have lost the right to participate in public tenders by decision of any other Public Service, Public corporation, or SA of the public sector because they have not fulfilled their contractual obligations.
- Foreign Legal entities that have assessed similar penalties, with the ones described above.
- Those who are in the process of bankruptcy, liquidation, administration, composition or any other similar proceedings under national laws and regulations (where in the present tender reference is made to bankruptcy, it also includes Article 99 of Law 3588 / 2007 on conciliation).
- Anyone convicted of an offence related to professional conduct based on a decision which is final.
- Those who have committed professional misconduct, which can be proven by any means by the contracting authority.
- Those who have not fulfilled obligations relating to the payment of social security contributions in accordance with the laws of the country where they are established or under Greek law.
- Those who have not fulfilled their obligations regarding the payment of taxes in accordance with the laws of their country of residence or in accordance with Greek legislation.
- Those who are guilty of misrepresentation or failure to submit information required under Article 45 of Directive 2004/18/EC.
- Associations of persons, if any of the conditions for exclusion of this paragraph applies to at least one member.

## **4. Supporting documentation for participation**

### **4.1. Main Documentation**

Any interested parties invited to take part in the tender shall have to submit, under penalty of exclusion, the following supporting documentation along with their offers. Additionally, they should include in the “Folder of documentation for participation”, the following tables filled in, where applicable (according their legal status), taking into consideration the following instructions:

- The column «DESCRIPTION OF DOCUMENTATION» is filled in with the respective documentation which has to be submitted together with the Proposal.
- In the column «REQUIREMENT» the word «YES» has been filled in. This means that the relevant documentation has to be submitted mandatory by the candidate Contractor.
- In the column «REPLY» the candidate Contractor fills in YES/NO depending on whether the relevant documentation is submitted or not.



- In the column «REFERENCE» the candidate Contractor will record the relevant chapter or section of the “Folder of documentation for participation”, where the required documentation is included.

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
1	Letter of Participation Guarantee according to: <ul style="list-style-type: none"> <li>• Article 25 of the P.D. 118/2007 and</li> <li>• The present Tender and the Annex.</li> </ul>	YES		
2	Solemn Declarations of Law 1599/1986, with verification for the authenticity of the signatures, where the candidate Contractor* shall state that until the day of submission of his proposal: *{ <ol style="list-style-type: none"> <li>a) if the candidate is a natural person, the natural person itself</li> <li>b) if the candidate is a legal person, the legal representative or the administrator or the authorized person on behalf of the legal person and himself as well as for other partners or administrators or (other) legal representatives or the President in case of SA company.</li> </ol> A: <ol style="list-style-type: none"> <li>1. There are no reasons for exclusion for the candidate, as indicated in article 43 of the P.D60/2007</li> <li>2. They have not been convicted by a final court decision, for an offence related to the exercise of their profession, for any of the offences of embezzlement, fraud, extortion, forgery, perjury, bribery and fraudulent bankruptcy.</li> <li>3. They are not bankrupted or in the process of declaring bankruptcy.</li> <li>4. They are aware of their obligations concerning social security contributions (main and auxiliary) as well as of their tax obligations.</li> <li>5. They are not under ordinary winding-up as set in Law 2190/1920, as applicable, or under primary winding-up as set in Law1892/1990 (OGG A`101.31.7.90), as applicable, or other equivalent situations (only for foreign legal persons) as well as that they are not under the process of issuing a decision for ordinary or primary winding-up, as set in the above mentioned Laws, or under the process of issuing a decision for an equivalent situation (only for foreign legal persons).</li> <li>6. Are registered at the relevant Chamber or Professional or Trade Registry as well as that they are exercising their profession.</li> </ol> B: <p>If nominated Contractor, will bring for the conclusion of the contract, within twenty (20) calendar days after the invitation of the Contracting Authority the relevant award documents.</p>	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	<p>C:</p> <ol style="list-style-type: none"> <li>1. has not committed any serious professional misconduct,</li> <li>2. has not been deprived of supplies or service contracts in the public sector and</li> <li>3. has not been punished by exclusion from procurement contracts and services in the public sector.</li> </ol> <p>D:</p> <ol style="list-style-type: none"> <li>1. the proposal was prepared in accordance with the terms of this Tender, for which he received knowledge and accepted unconditionally its terms.</li> </ol> <p>E:</p> <ol style="list-style-type: none"> <li>1. there is no inconsistent position and prohibitions within the meaning and the requirements of Articles 3 and 4 of Law 3310/2005 respectively, as replaced by Article 3 and 4 of Law 3414/2005 respectively.</li> </ol>			
3	If the candidate is a natural person who participates with a representative, the necessary representation documents.	YES		
4	In case of legal persons, the necessary documents of establishment and representation, as applicable at the date of the Tender, which declare the legal establishment and the operation of the candidate and the natural person who binds the legal entity with his signature.	YES		
5	<p>In case of legal persons and in case where</p> <ol style="list-style-type: none"> <li>a) the Proposal is not signed by the legal representative, a notarized document authorizing the representative to sign.</li> <li>b) the submission of the Proposal or/and the attendance during the opening of the tenders is not done by the legal representative, the necessary (as set by law) authorization for the person who will do the submission of the Proposal or/and attend the opening of the tenders.</li> </ol>	YES		
6	<p>In case of Association or Consortium the following are additionally required:</p> <ul style="list-style-type: none"> <li>• If the proposal is not signed by each member of the Association/ Consortium an notarized authorization letter for the person signing it..</li> <li>• Minutes of the Decision of the administration body of each member stating the approval for participation in the Association/ Consortium in order to participate in the Tender.</li> <li>• An agreement cooperation where: <ol style="list-style-type: none"> <li>a) all member will take jointly and severally the responsibility for the participation in the Tender and the responsibility for implementing the work,</li> </ol> </li> </ul>	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	b) will appoint a joint representative of the Association/ Consortium and its members for the participation in the Tender and the representation of the Association/ Consortium to the Contracting Authority, c) will appoint share of participation for each member in the Association/ Consortium d) will clearly define the part of the project undertaken by each member of the Association/ Consortium out of the entire Proposal e) one member will be indicated as responsible for the coordination and the administration of all members of the Association/ Consortium (leader) f) will indicate the legal representative of the Association/ Consortium and its members.			
7	In the case of domestic societe anonyme (S.A) companies the documentation provided by article 8 of Law 3310/05, as amended by article 8 of Law 3414/05 and by the P.D. 82/96 (OGG A'66) «concerning the share registration of the Greek societe anonyme (S.A) companies» as amended and in force and under the conditions specified in those provisions. In the case of foreign companies the documentation provided by the provisions of Article 8 of Law 3310/05, as amended by article 8 of Law 3414/05 «concerning the share registration of the companies that award public contracts» and under conditions specified in those provisions.	YES		

#### 4.2. Award documentation

The Tenderer to whom the contract will be awarded has to submit, within twenty (20) calendar days after the written notification concerning the award decision, all necessary documentation in a SEALED ENVELOP.

The envelop «Award Documentations» shall include all documentation of the Tenderer, organized in the same order and numbering as indicated in the following tables.

Documentation that are issued in a foreign language, other than the Greek, should be accompanied by an official translation in the Greek language.

Additionally, in the envelop «Award Documentation» the Tenderer should include all the relevant tables, among the following ones, filled in according to the following instructions:

- The column «DESCRIPTION OF DOCUMENTATION» is filled in with the respective documentation which has to be submitted, according to the above mentioned.
- In the column «REQUIREMENT» the word «YES» has been filled in. This means that the relevant documentation has to be submitted mandatory by the candidate Contractor.
- In the column «REPLY» the candidate Contractor writes YES/NO depending on whether the relevant documentation is submitted or not.

- In the column «REFERENCE» the candidate Contractor will record the relevant chapter or section of the envelop “Award Documentation”, where the required documentation is included.

Otherwise the Tenderer is disqualified with the consequences listed below, and the Contract is awarded to the next tenderer who meets the award criteria. The documentation that has to be submitted by the the Tenderer according to the aforementioned, are:

### Greek citizens

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
1.	A certificate of the relevant Chamber, certifying the registry of the candidate Contractor to the Chamber and certifying his profession or a declaration from a competent authority certifying the practice of his profession. This certification or declaration should not be issued more than six (6) months before the date of notification for submission of documentation for the Contract Award.	YES		
2.	A copy of the criminal record of the candidate Contractor, certifying that he has not been convicted by final judicial decision for an offense related to the practice of his professional, for offenses specified in article 43 paragraph 1 of the P.D. 60/2007 (OGG 64/A'/16.03.2007), concerning the adaptation of Greek legislation to the provisions of EU Directive 2004/18/EC, as well as for the offenses of embezzlement, fraud, extortion, forgery, perjury, bribery and fraudulent bankruptcy. This copy of the criminal record should not be issued more than three (3) months before the date of notification for submission of documentation for the Contract Award.	YES		
3.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor has not been bankrupted. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
4.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of declaring bankruptcy. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
5.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not subject to administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	the documentation for the Contract Award.			
6.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of being put under administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
7.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not under cease of operation or bankruptcy arrangements or suspension of operation and no process of bankruptcy arrangements has been initiated against him. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
8.	Solemn declaration of Law 1599/1986, where the candidate Contractor will declare all the social security organizations towards whom he has to pay contributions for the employed personnel.	YES		
9.	Certificates, from all the social security organizations which the candidate Contractor includes in the Solemn Declaration of the previous paragraph, verifying that he is aware of all the social security contributions he has to pay by the date of notification for submission of the documentation for the Contract Award.	YES		
10.	Certificate from a competent authority, verifying that the candidate Contractor is aware of his tax liabilities by the date of notification for submission of the documentation for the Contract Award.	YES		
11.	Solemn Declaration, according to the provisions of the Joint Ministerial Decision 20977/2007, verifying that no conviction has been issued against the candidate Contractor, in the sense of article 3 of Law 3310/2005, as replaced by article 3 of Law 3413/2005.	YES		

In case some of the above mentioned documentation are not issued or do not cover all the aforementioned cases, then they should be replaced, under penalty of exclusion, by an **Affidavit of the candidate Contractor, redacted in the presence of a notary or a magistrate**, where it will be confirmed that the candidate Contractor is not in the respective situation. This Affidavit **will be mandatorily submitted in the envelop** «Award Documentation».

## Foreign citizens

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
1.	A certificate of the competent authority in the country of the candidate Contractor, certifying his registry to the relevant Chamber, or to the relevant professional or trade register. This certification or declaration should not be issued more than six (6) months before the date of notification for submission of documentation for the Contract Award.	YES		
2.	A copy of the criminal record of the candidate Contractor, or if not available, an equivalent document issued by the competent judicial or administrative authority of the country of the candidate Contractor, certifying that he has not been convicted by final judicial decision for an offense related to the practice of his professional, for offenses specified in article 43 paragraph 1 of the P.D. 60/2007 (OGG 64/A'/16.03.2007), concerning the adaptation of Greek legislation to the provisions of EU Directive 2004/18/EC, as well as for the offences of embezzlement, fraud, extortion, forgery, perjury, bribery and fraudulent bankruptcy. This copy of the criminal record should not be issued more than three (3) months before the date of notification for submission of documentation for the Contract Award.	YES		
3.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor has not been bankrupted or has not been in an equivalent situation foreseen by the Laws of his country. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
4.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of declaring bankruptcy or in an equivalent process foreseen by the laws of his country . This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
5.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not subject to administrative receivership or an equivalent situation foreseen by the Laws of his country. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
6.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of being put under administrative receivership or an equivalent situation foreseen by the Laws of his country. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
7.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not under cease of operation or bankruptcy arrangements or suspension of operation and that no process of bankruptcy arrangements has been initiated against him. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
8.	Solemn declaration of Law 1599/1986 or affidavit redacted in the presence of a competent authority or a notary or if no affidavit is foreseen in the country of the candidate Contractor, a solemn declaration redacted in the presence of a judicial or administrative authority, a notary or a competent professional body, where the candidate Contractor will declare all the social security organizations towards whom he has to pay contributions for the employed personnel.	YES		
9.	Certificates, from all the social security organizations which the candidate Contractor includes in the Solemn Declaration of the previous paragraph, verifying that he is aware of all the social security contributions he has to pay by the date of notification for submission of the documentation for the Contract Award.	YES		
10.	Certificate from a competent authority, verifying that the candidate Contractor is aware of his tax liabilities by the date of notification for submission of the documentation for the Contract Award.	YES		
11.	Solemn Declaration, according to the provisions of the Joint Ministerial Decision 20977/2007, verifying that no conviction has been issued against the candidate Contractor, in the sense of article 3 of Law 3310/2005, as replaced by article 3 of Law 3413/2005.	YES		

If in the country of the candidate Contractor some of the above mentioned documentation are not issued or do not cover all the aforementioned cases, they should, under penalty of exclusion, be **replaced by** an Affidavit of the candidate Contractor or, in the countries where no Affidavit **is foreseen**, by a Solemn Declaration of the candidate Contractor redacted in the presence of a judicial or administrative authority, a notary or a competent professional body of the country of the candidate Contractor, where it will be confirmed that in the country of the candidate Contractor the specific documents are not issued and that the candidate

Contractor is not in the respective situation. The Affidavit **will be mandatory submitted in the envelop** «Award Documentation». In the affidavit or solemn declaration described above, it will be declared that in the country of the candidate Contractor the specific documents are not issued and that the above mentioned legal situations are not met by the candidate Contractor.

### Domestic or Foreign Legal Persons

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
1.	A certificate of the relevant Chamber, certifying the registry of the candidate Contractor to the Chamber and certifying his profession or a declaration from a competent authority certifying the practice of his profession. This certification or declaration should not be issued more than six (6) months before the date of notification for submission of documentation for the Contract Award.	YES		
2.	All documents declaring the establishment and the representation of the candidate Contractor and the record the relevant publication formalities.	YES		
3.	<p>A copy of the criminal record of the candidate Contractor or in the case of foreign legal person an equivalent document issued by the competent judicial or administrative authority of the country of the candidate Contractor, certifying that they have not been convicted for:</p> <p>a) An offence related to the practice of their professional and</p> <p>b) Offences specified in article 43 paragraph 1 of the P.D. 60/2007 (OGG 64/A'/16.03.2007), concerning the adaptation of Greek legislation to the provisions of EU Directive 2004/18/EC</p> <p>c) The offences of embezzlement, fraud, extortion, forgery, perjury, bribery and fraudulent bankruptcy.</p> <p>Indebted for submission of criminal records are:</p> <ul style="list-style-type: none"> <li>• Partners and administrators in Unlimited Companies and Limited Companies</li> <li>• Administrators of Limited Liability Companies</li> <li>• President and Managing Director and members of the Board for S.A. companies</li> </ul> <p>In every other case of legal person, its legal representatives.</p> <p>This copy of the criminal record should not be issued more than three (3) months before the date of</p>	YES		



A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	notification for submission of documentation for the Contract Award.			
4.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor has not been bankrupted. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
5.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of declaring bankruptcy. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
6.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not subject to administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
7.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of being put under administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
8.	Certificate of the competent judicial or administrative authority, verifying that the candidate Contractor is not under ordinary winding-up as set in Law 2190/1920, as applicable, or under primary winding-up as set in Law1892/1990 under the process of issuing a decision for ordinary or primary winding-up, as set in the above mentioned Laws. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
9.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not under cease of operation or bankruptcy arrangements or suspension of operation and that no process of bankruptcy arrangements has been initiated against him. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	the Contract Award.			
10	Solemn declaration of Law 1599/1986, where the legal representative of the candidate Contractor will declare all the social security organizations (main and auxiliary) towards whom he has to pay contributions for the employed personnel.	YES		
11.	Certificates, from all the social security organizations which the candidate Contractor includes in the Solemn Declaration of the previous paragraph, verifying that he is aware of all the social security contributions he has to pay by the date of notification for submission of the documentation for the Contract Award.	YES		
12.	Certificate from a competent authority, verifying that the candidate Contractor is aware of his tax liabilities by the date of notification for submission of the documentation for the Contract Award.	YES		
13.	Solemn Declaration, according to the provisions of the Joint Ministerial Decision 20977/2007, verifying that no conviction has been issued against the candidate Contractor, in the sense of article 3 of Law 3310/2005, as replaced by article 3 of Law 3413/2005.	YES		

For domestic Legal Persons, if some of the above mentioned documentation are not issued or do not cover all the aforementioned cases, then they should be replaced, under penalty of exclusion, by an Affidavit of the candidate Contractor redacted in the presence of a notary or a Magistrate, where it will be confirmed that the candidate Contractor is not in the respective situation. This Affidavit **will be mandatorily submitted in the envelop** «Award Documentation».

For foreign Legal Persons, if some of the above mentioned documentation are not issued or do not cover all the aforementioned cases, then they should be replaced, under penalty of exclusion, by an Affidavit of the candidate Contractor or in the countries where no Affidavit is foreseen, by a solemn declaration of the candidate Contractor, redacted in the presence of a judicial or administrative authority, a notary or a competent professional body of the country of the candidate Contractor, where it will be confirmed that the candidate Contractor is not in the respective situation. This Affidavit **will be mandatory submitted in the envelop** «Award Documentation». In the later affidavit or solemn declaration it will be declared that in the country of the candidate Contractor the specific documents are not issued and that the above mentioned legal situations are not met by the candidate Contractor.

## Partnerships

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
1.	All documents declaring the establishment and the representation of the candidate Contractor. These documents should be submitted in originally copies.	YES		
2.	Declaration from the competent authority that the candidate Contractor operates legally.	YES		
3.	A copy of the criminal record of the candidate Contractor, certifying that the President of the Board and the legal representatives or administrators have not been convicted for an offense related to the practice of their professional for offenses specified in article 43 paragraph 1 of the P.D. 60/2007 (OGG 64/A'/16.03.2007), concerning the adaptation of Greek legislation to the provisions of EU Directive 2004/18/EC, as well as for the offences of embezzlement, fraud, extortion, forgery, perjury, bribery and fraudulent bankruptcy. This copy of the criminal record should not be issued more than three (3) months before the date of notification for submission of documentation for the Contract Award.	YES		
4.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor has not been bankrupted. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
5.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of declaring bankruptcy. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
6.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not subject to administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
7.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not in the process of being put under administrative receivership. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
8.	Certificate of the competent judicial or administrative authority, verifying that the candidate Contractor is not under ordinary winding-up as set in Law 2190/1920, as applicable, or under primary winding-up as set in Law 1892/1990 under the process of issuing a decision for ordinary or primary winding-up, as set in the above mentioned Laws. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
9.	A certificate from the competent judicial or administrative Authority, verifying that the candidate Contractor is not under cease of operation or bankruptcy arrangements or suspension of operation and that no process of bankruptcy arrangements has been initiated against him. This certificate should not be issued more than six (6) months before the date of notification for submission of the documentation for the Contract Award.	YES		
10	Solemn declaration of Law 1599/1986, where the legal representative of the candidate Contractor will declare all the social security organizations (main and auxiliary) towards whom he has to pay contribution for the employed personnel.	YES		
11.	Certificates, from all the social security organizations which the candidate Contractor includes in the Solemn Declaration of the previous paragraph, verifying that he is aware of all the social security contributions he has to pay by the date of notification for submission of the documentation for the Contract Award.	YES		
12.	Certificate from a competent authority, verifying that the candidate Contractor is aware of his tax liabilities by the date of notification for submission of the documentation for the Contract Award.	YES		
13.	Solemn Declaration, according to the provisions of the Joint Ministerial Decision 20977/2007, verifying that no conviction has been issued against the candidate Contractor, in the sense of article 3 of Law 3310/2005, as replaced by article 3 of Law 3413/2005.	YES		

In case some of the above mentioned documentation are not issued or do not cover all the aforementioned cases, then they should be replaced, under penalty of exclusion, by an **Affidavit of the candidate Contractor, redacted in the presence of a notary or a magistrate**, where it will be confirmed that the candidate Contractor is not in the respective situation. This Affidavit **will be mandatory submitted in the envelop** «Award Documentation».

In case of foreign partnership, the candidate Contractor is bonded by the obligation mentioned in point 8 of the table of documentation, which describe the documentation that a candidate Contractor who is a legal person (domestic or foreign) has to submit.

For foreign Legal Persons, if some of the above mentioned documentation are not issued or do not cover all the aforementioned situations then they should be replaced, under penalty of exclusion, by an Affidavit of the candidate Contractor or in the countries where no Affidavit is foreseen, by a solemn declaration of the candidate Contractor, redacted in the presence of a judicial or administrative authority, a notary or a competent professional body of the country of the candidate Contractor, where it will be confirmed that the candidate Contractor is not in the respective situation. This Affidavit **will be mandatory submitted in the envelop** «Award Documentation». In the later affidavit or solemn declaration it will be declared that in the country of the candidate Contractor the specific documents are not issued and that the above mentioned legal situations are not met by the candidate Contractor.

### Associations / Consortiums

A/A	DESCRIPTION OF DOCUMENTATION	REQUIREMENT	REPLY	REFERENCE
	<ul style="list-style-type: none"> <li>For each member of the Association/ Consortium all necessary documents must be submitted (depending on whether the member is domestic/foreign natural person, domestic/ foreign legal person, partnership).</li> </ul>	YES		

## 4.3. Additional documentation forms

### 4.3.1. Documentation of Economic and financial capacity

Tenderers must demonstrate sufficient financial resources. Specifically, in their proposal they shall:

1	Have a certificate of financial capacity by recognized banks in the country of establishment.
1.1	The Tenderer, in accordance with company law in the country where it is located, shall: Similar certificates of financial capacity by at least two (2) banks

CRES reserves the right to request additional information for the evaluation of the economic and financial capacity of the tenderer (including the members of a consortium and the subcontractors, if any).

#### **4.3.2. Technical and Professional Capacity Certification**

The technical and professional capacity of economic operators will be assessed with regard in particular to their know-how, cost-efficiency, experience and reliability. In the case of joint tender (consortium) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender.

Evidence of the technical and professional capacity of economic operators must be furnished on the basis of the following information:

##### **a) Educational and professional qualifications:**

- Contractors must enclose a CV of all personnel to be involved directly in performing the contract (including those working for any subcontractors) indicating educational and professional qualifications and experience in areas relevant to the subject of this tender.
- They must indicate the language competence levels of those to be assigned to the work, bearing in mind that the main working languages in CRES are Greek and English.
- They must indicate whether or not the proposed staff is currently working for the Contractor on the date of submission of the offer. The tender will clearly indicate if the proposed expert is an employee or not of the Contractor. If the proposed expert is not an employee, he will be considered as a subcontractor. Any person who is engaged on another project, where the input from his/her position in that contract will not have ended before the expected start of his/her activities under this contract, and where this commitment restricts his/her intended role under this contract must not be proposed for this contract under any circumstances.
- A signed commitment (letter of availability) from all named persons (including employees and subcontractors) to accept the work proposed by the Contractor. If the Contractor is awarded the contract, it must be attached.

b) Presentation of a list of the principal services provided in the past three years, with the sums, dates and recipients (public or private). CRES reserves the right to request additional information in order to assess the technical and professional capacity of the Contractor.

c) has a total turnover in the three (3) previous fiscal years (2007, 2008, 2009) of at least € 6.000.000, excluding VAT.

The tenderer must demonstrate the above minimum conditions for participation by depositing the documenting records (in accordance with the laws of the country where the tenderer is installed):

Balance sheets of last three (3) financial years (2007,2008, 2009), if required to issue balance sheets.

or

Statement of total amount of annual turnover, if s/he is not obliged to issue balance sheets.

#### **4.4. Participation Letter of Guarantee**

Tenderers are required under penalty of exclusion, to submit a participation letter of guarantee along with the proposal, which should amount to 5% of the available budget VAT incl. i.e. sixty thousand nine hundred and seventy five euros (60.975€).

The tender guarantee should be valid for at least one (1) month after the validity expiration of the proposal.

The participation letter of guarantee must explicitly include the term that the guarantee covers the obligations of all members of the Association or the Consortium.

The participation letter of guarantee is returned to the Contractor after the submission of a performance guarantee within five (5) days of signing the contract, while to the other Tenderers within five (5) from the date of final notice of award.

The participation letter of guarantee is issued by credit institutions or other entities operating legally in Greece or another Member State of the European Union (EU) or the European Economic Area (EEA) or in third countries that have signed the Agreement on Government Procurement of the World Trade, ratified by Law 2513/1997 and are eligible in accordance with the laws of these states. Guarantees can also be obtained from bank or institution legally operating in a country/place with a bilateral or multilateral agreement with the EU or a country which has signed and ratified the Agreement on Government Procurement and has the right in issuing guarantees.

Guarantees issued in another country outside of Greece, will be accompanied by an official translation in Greek, according to PD 118/2007 and PD 60/2007.

The participation letter of guarantee must, under penalty of exclusion, be issued pursuant to the above, and contain all the terms listed in Annex Compulsory Form 1: Participation Letter Of Guarantee.

In the case where the Contractor, to whom the project will be awarded, refuses to sign the contract in time or give evidence of a performance guarantee before signing the contract, as defined herein, or in time to meet any obligation, arising from participating in the tender, he shall be revoked, so the guarantee for participation is automatically forfeited in favor of CRES after the issuance of a relevant decision.

The provisions of PD 118/2007 are valid as regards any other issue.

## 5. Lacking documentation -Clarifications

In the case that there is failure to submit any of the supporting documents of section 4 (Part B) of this notice or if the submitted documents do not meet the tender terms, the tender is rejected as unacceptable.

### Clarifications

1.	The competent Committee may ask the tenderer for clarification of the foregoing documentation.
2.	The tenderer may submit any other documentation to prove his/her capacity, besides the aforementioned documents.
3.	Any lack or incorrect documentation that will be found after document control, implies the exclusion of that tenderer whose documents were incomplete or inaccurate. However, the Committee may seek to supplement or clarify the certificates produced already mentioned above, and tenderers are required to submit them within three (3) working days from the date of the request in writing. If the above are not submitted within this period, the tender will be rejected.
4.	Any minor defects of the tender guarantee beyond the necessary elements defined in Article 25 of Decree 118/2007 can be covered within 5 days from the Committee's written notice to the tenderer.
5.	In no case the submission of missing documents is permitted after the deadline for tenders.
6.	If the tenderer is an Association / Consortium: The necessary documents required by this paragraph must be submitted separately for each member of the Association/ Consortium. It is permitted for members to partially meet the requirements, but at least one member of the Association / Consortium suffices to cover all requirements for participation. For the remaining members, it is compulsory that they operate for at least the last five (5) management / financial years
7.	In the case of an Association/Consortium, the reported sum of the tender guarantee may be covered by either one or more of the aggregate tender guarantees of the association or consortium. Each one of them, however, must state that it covers the obligations of all members of the Association / consortium from participating in the Tender.
8.	The tenderer may, if necessary, rely on the capacities of other entities, regardless of the legal nature of the ties between them. In this case, it must be proven to the Contracting Authority that, for the contract execution, it will have the resources necessary at its disposal by presenting a letter of commitment of these entities to make available the financial resources necessary institution as defined in Par. 3 of Article 46 of Presidential Decree 60/2007.
9.	Records or documents issued in another language other than Greek, must be accompanied by an official translation into Greek. Specifically regarding the declaration of Law 1599/86, regarding foreign applicants, it is replaced by a sworn statement before a judicial or administrative authority or notary.
10.	If copies of these documents are submitted, these should be issued by the competent legal persons, scertifying that they are exact replicas of the original or the certified true copies of the original.

It should be noted that the clarifications relate solely to already submitted documents and not to replace submitted or present missing documents.



## 6. Proposals

### 6.1. Deadline for submissions

The deadline for submission of proposals expires on **dd/mm/yyyy** and **hh:mm** (GMT+2).

After submission, any additional or clarifying information, except those that may be requested by the Tendering Committee, is not accepted, but rejected as unacceptable.

Alternative proposals are not accepted.

On the opening of proposals, all those who have submitted a proposal may be present in person or through their legal representative or a legally authorized person.

Proposals of those participating in the call for tenders must be submitted to CRES, 19th km Marathon Avenue, Pikermi 190 09, tel: (+30) 210-6603300 fax. (+30) 2106603301, and be registered at the Secretariat. The proposals that have reached timely in the above office until the date and time of tender notice are accepted.

Proposals may be submitted by mail (registered) or through a courier company. They are considered valid only if they have been registered at the Secretariat, as specified above.

### 6.2. Compilation of Proposals

Proposals are submitted in Greek or any language of the European Union, accompanied by an official translation in Greek (with the exception of technical terms that may be mentioned in English). If in disagreement, the official translation in Greek prevails.

Certificates of foreign authorities are accepted, if accompanied by an official translation in Greek. All proposal documents should be written or officially translated into Greek, under penalty of exclusion.

The proposals apply to the entire project.

Interested parties may request additional details about the content of this notice in writing only.

Additional details on the notice are provided no later than six (6) calendar days before the set deadline for receipt of proposals and if they have been requested in writing at least twelve (12) calendar days before the expiry of the set date for receipt of proposals. The clarifications sought will be sent in writing to the questioner along with the responses. Following the submission and opening of proposals, clarifications, modifications or rejection of proposal terms are not accepted and are rejected as unacceptable.

### 6.3. Validity of Proposals

Proposals are valid and binding on the participants in the call for tenders for six (6) months from the day after the deadline for submission of proposals. Proposals reporting a period of validity of less than six months are rejected as unacceptable.

If an issue on extending the tender arises, the Contracting Authority shall forward a written question to the tenderers, ten (10) working days before the expiry of the tender, if they will accept the extension for a specified period. Tenderers must reply within five (5) working days.

The announcement of the selection of Contractor can be made after the expiry of the tender but the tenderer is bound only if he accepts it. In case of refusal of the award, second consecutive selection is assigned the contract.

### 6.4. Available Project Budget – Contractor's costs

The Contractor's costs will be defined according to the financial proposal that will be submitted by each Tenderer for the project implementation.

In any case, the total cost shall not exceed **one million, two hundred nineteen thousand, five hundred twelve Euro (1.219.512 €)**, excluding 23% VAT, i.e. one million five hundred thousand Euro (1.500.000€).

All proposed prices refer to the total cost for the project implementation. The proposed prices will remain constant for the entire project duration.

### 6.5. Method for proposals submission

Proposals must be submitted in two (2) copies to be placed in the same sealed envelope. In one of the two copies and on each page the word "ORIGINAL must be written, and this will be the predominant copy, in case of dispute between them. Each page of the ORIGINAL should be signed.

The envelopes containing the copies of proposals must necessarily bear the name and address of the tenderer as well as the particulars:

Proposal

Notice No: (refer to the number of registration)

International Open Procedure Call for Tenders for the SELECTION OF CONTRACTOR FOR THE PROJECT "Conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption"

CENTRE FOR RENEWABLE ENERGY AND SAVING

Tender Date: **dd/mm/yyyy** and Time: **hh:mm (GMT+2)**

"Not to be opened by the post office or the Registry"

Self-adhesive envelopes, which can be unsealed and resealed without trace, should not be used.

The documentation of each proposal is accompanied by a letter, which should indicate the company or association or consortium submitting the proposal.

The documentation for each proposal includes the following three (3) separate sealed envelopes:

- Envelope 'DOCUMENTS' containing the DOCUMENTS, an ORIGINAL and one copy, which are described in detail in sections 4.1 and 4.3.1 of Part B of this tender. In this envelope, the tender guarantee in accordance with the Compulsory Form in Annex will be included.
- Envelope "TECHNICAL PROPOSAL" containing the ORIGINAL and one copy, the contents of which are described in detail below in this notice, in section 6.6.
- Envelope "FINANCIAL PROPOSAL" containing only one (1) original of the Economic Contribution of the participants. The contents of the financial proposal are described below in this notice, in section 6.7.

## **6.6. Contents of the “Technical Proposal” Envelop**

### **6.6.1.**

The “TECHNICAL PROPOSAL” envelop is divided into five sections, the contents of which are described in the following paragraphs:

- A. Proposal for the project’s methodological approach
- B. Project Management and Organization
- C. Wok Program and Deliverables
- D. Detailed Planning for the project implementation
- E. All of which are described in Article 4.3.2

### **6.6.2.**

The “Proposal for the project’s methodological approach” Section included a detailed description of the method that will be applied by the Tenderer to approach the project.

The proposal refers to the following:

- The methodological approach for the implementation of the project’s section described in Part A of the tender.
- The necessary information and data to be collected (type and source)
- The potential problems that are foreseen to arise and the proposed approach for overcoming the problems and collect/elaborate the data.

- The field surveys that are considered by the Tenderer necessary for the implementation of the project (here there will be a reference to type of fields, survey type, survey extent, implementation method and survey duration).
- The tools for the support and implementation of the proposed method as well as the way they will be applied at the current project.

### 6.6.3.

The “Project Management and Organization” Section includes:

1. Detailed description of the structure and organization of the project team involved.
2. Filled-in Table 1 (see below) with detailed data regarding the involvement of each of the proposed members of the Project Team as well as specialized partners:

Table 1: Detailed Data for the Involvement of the Project Team		
Company:		
Member	Team Position	Tasks

**where:**

- Column “Member” shall contain the Name of each proposed member of the Project Team.
- Column “Team Position” shall contain the member’s role, according to the proposed team structure.
- Column “Tasks” contains the specific tasks that will be undertaken by each member and are based on the proposed approach.

### 6.6.4.

Sections C and D of the “Technical Proposal” envelop should meet a minimum of what is described in chapters 2 and 3 of Part A hereof.

## 6.7. Contents of the «Financial Proposal» Envelop

The Envelop «FINANCIAL PROPOSAL» shall include the total financial proposal for the implementation of the project, formulated in words and figures, in EUROS, excluding VAT and with VAT. For the financial proposal, the form in the Annex must be completed, under penalty of exclusion (Compulsory Form 4).

If the proposal of a certain tenderer seems unusually low, i.e. resulting in a discount greater than 20% on the above amounts, it will be rejected. The contracting authority may request

details of the composition of the proposal in writing, if considered reasonable, before proceeding to any rejection of the proposal. These details may relate in particular to those mentioned in Article 52 of Decree 60/2007.

The financial proposal is signed by the legal representatives of the tenderer(s).

## **7. Tendering Procedure – Evaluation of Proposals**

The opening of the tenders submitted on time or sent and received by CRES, is carried out by the Committee before representatives of the Tenderers.

The Committee initiates the proposals opening procedure on the date and at the time specified in the Tender, after receipt of the sealed envelopes with proposals submitted on time. Proposals that are submitted to the aforementioned body after the initiation of the proposal opening procedure shall not be opened and shall be returned as received after the deadline.

The opening of the proposals is carried out by the present members of the Proposal Evaluation Committee as follows:

The main envelop is opened and is followed by the opening of the sub-envelop that contains the documentation and the tender guarantee; all original documents as well as the closed envelop of Technical and Financial Proposal are signed by the Committee.

The Committee shall define in the next days, depending on the volume of proposals – the time interval for the verification of the submitted documents and Technical Proposals of the Tenderers.

The financial proposal envelope shall not be opened, rather signed and retained by the Evaluation Committee. The financial proposal shall be opened after the other data evaluation is completed and a decision on the approval of the process for technical evaluation is taken and for the proposals that have been accepted.

The tender evaluation is performed on the basis of rating individual groups of criteria.

The Committee records the Tenderers in the Proposals Opening Minutes, which is signed by all present members of the Committee.

In case that confidential data and information, the disclosure of which to other Tenderers should be against the Tenderer's interests, are submitted with the Proposal, the Tenderer shall note thereon the words "Confidential Information". All confidential information should be summarized at the beginning of the proposal. Otherwise this information may be visible by other Tenderers. The concept of confidential information refers solely to the privacy protection in regards with technical or commercial issues of the company concerned.

### **7.1. Verification of qualitative selection criteria**

#### **7.1.1. Verification process of the supporting documentation for participation**

After the opening of proposals, the Committee verifies the correctness and completeness of

the documentation submitted as well as the tender guarantees and registers the results to its Minutes.

The Committee may ask the Tenderers to provide the relevant details for the submitted documentation in accordance with the terms of the Tender.

If, during the verification process, arises the need of rejecting offers that do not meet the requirements of the Tender, the Committee draws up the minutes, which document the reasons for the rejection and which are sent, along with the rejected offers, to the Decision Making Body, who issues the necessary rejection decisions that will be communicated to the Tenderers.

Upon completion of the documentation and tender guarantees verification, the Committee evaluates the technical proposals.

### **7.1.2. Qualitative selection criteria**

Prerequisite for the qualitative selection of Tenderers, beyond the verification of their status through the submission of the aforementioned documentation and affirmations, is the verification of the fulfilment of the criteria regarding economic and financial capacity as well as technical and/or professional capacity.

#### **A. Criterion regarding the economic and financial capacity of the Tenderer:**

An examination of the Tenderer's capacity for implementing the project will be performed based on the data submitted, as described in section 4.3.1. The minimum condition for the qualitative selection shall be an average annual turnover for the past three years of at least two million Euro (2.000.000. €).

#### **B. Criterion regarding the technical and/or professional capacity of the Tenderer:**

An examination of the previous involvement in projects that are relevant to the subject of the tender and were undertaken in the past by the tenderer, according to the submitted data, as well as the respective experience of the Project Team, according to the data of section 4.3.2 will be performed. Apart from the required experience of the Project Manager and the Project Team, as described in chapter 5 (Part A) and section 2.1.2 (Part B) hereof, the following shall be also taken into consideration:

- I. The Contractor's proposal has to include at least one team member with at least 10-year professional experience in the fields of annual and monthly analysis of energy policies and statistical issues at national level (data collection, methodology, analysis and dissemination, data quality assessment).
- II. The Contractor's proposal has to include at least one team member with at ten-year professional experience in performing market studies.

Minimum requirement for the qualitative selection is the successful completion of at two (2) similar projects in the last three years.

The assessment of the Technical Proposal is only performed for those Tenderers who meet the aforementioned criteria. In any other case, the proposal is justifiably rejected as not

having met the minimum defined requirements and the sub-envelopes of the Technical and Financial Proposal are sent back unopened to the unsuccessful Tenderers.

The Tendering Committee conducts the relevant minutes and advises the Contracting Authority of the acceptance or justified rejection of the proposals of Tenderers who have submitted incomplete information in the respective subfolder or whose submitted information does not meet the conditions of the tender.

The decision of the Contracting Authority is communicated to all Tenderers per mail, e-mail or fax.

After the idle period for lodging appeals or calling an examination of potential rejected proposals during the first stage, the Tendering Committee defines the date of opening of the technical proposals' subfolders and updates the Tenderes who are not excluded during this phase per e-mail or fax.

In case of joint tenders, the aforementioned criteria are examined cumulatively for the participants.

## 7.2. Evaluation of the technical quality of the proposal

The technical proposal (including any subcontracted parts) must be sufficiently detailed to enable the proposal to be assessed on the basis of all award criteria mentioned below. It should meet the technical specifications and address all matters laid down therein. The tender should provide all the information required to award the contract, including a description of the intended team structure and the respective role of each team member and (where applicable) models, examples and technical solutions to problems raised in the specifications.

Merely repeating the mandatory requirements set out in these specifications without going into detail or adding any value will result in a very low score. The degree to which the criteria are met will be measured by a points score for each criterion. The relative importance of criteria for the overall score is indicated by the weighting of the award criteria.

The technical quality of the proposal will be assessed on the basis of the following criteria:

No.	Technical evaluation criteria	
	Group A: Technical criteria	70 points
1.	Understanding of project requirements and quality of methodology proposed (correlation with relevant EC methodology)	20 points
2.	Cost effectiveness of the data collection	10 points
3.	Coverage and Quality of statistical studies	20 points

4.	Project organization and management, timetable, proposed work flows	10 points
5.	Description of services and list of deliverables	10 points
	<b>Group B: Qualifications and competence of the proposed Personnel</b>	30 points
6.	Project manager (competence, technical capacity and time for the project) and management team	10 points
7.	Project team competence, specialties (statisticians, economists, energy analysts, policy analysts, etc) and time for the project, in relation to project key areas	20 points

- If the evaluation of the criteria of a proposal, as they are defined in section 7.2, results to less than 65 points (A+B, maximum is 100 points), the proposal is rejected. The specific criteria of the technical evaluation as presented in the preceding table are awarded on a five-points step (5 points), while the best proposal is awarded with the maximum points for each technical criterion individually.
- The tenderers should become aware of the high importance of criterion No.3. In case that the Tendering Committee judges the specific proposal under this criterion with a very low performance/effectiveness factor, it will then be awarded with 0 points. In the case that criterion No.3 is awarded with 0 points, then the whole proposal is rejected.

The total points awarded through this process, will be then compared to the price, on the basis of the method that follows.

To take into account the weight to be given to the technical proposal, the best technical proposal is awarded with the maximum of C points. For the rest of the proposals that, during the technical evaluation, have received total points equal or more than the lowest acceptable amount of total points, i.e. 65, they are, finally, awarded with the points that result from the following equation:

Points T = (initial points of the examined proposal / initial points of the best proposal) x C.

For the purposes of the present call, C is equal to 70 points.

### **7.3. Evaluation of the Financial Proposal**

To take into account the weight to be given to the financial proposal, the lowest financial proposal receives D points that is the maximum. The rest of the proposals are awarded as calculated by the following equation:

Point F = (lowest price / price of the examined proposal) x D

For the purposes of the present call, D is equal to 30 points.



## **7.4. Final Evaluation**

**The contract will be awarded to the economically most advantageous proposal.** The economically most advantageous proposal is determined by weighting the technical and financial proposal, on the basis of the following equation:

**Final points = T+F**

The proposal with the highest points is defined as the most advantageous one.

## **7.5. Opening Procedure**

### **7.5.1. Opening of proposals**

The tendering procedure and the proposals evaluation shall be performed by a Committee, which shall be appointed under decision of the Board of CRES.

The evaluation procedure takes place in three stages:

- Opening and verification of the main proposal envelop – Opening and verification of the “DOCUMENTATION” envelop.
- Opening and Evaluation of the “TECHNICAL PROPOSAL” envelop.
- Opening and Evaluation of the “FINANCIAL PROPOSAL” envelop – Final assessment – Selection of Contractor.

In the first stage, the Tendering Committee (TC), after having verified the “DOCUMENTATION” envelop, records the acceptance or justified rejection of proposals. The Committee’s report is communicated to the Tenderers by fax.

In the second stage, the Tendering Committee (TC) records the assessment of the technical proposals of the Tenderers. The Committee’s report is communicated to the Tenderers by fax.

In the third stage, the Tendering Committee (TC) records its suggestion to the Contracting Authority on the Project Award to the Tenderer with the economically most advantageous proposal. The decision of the Contracting Authority is communicated to the Tenderers by fax.

### **7.5.2. Evaluation of proposals**

With the opening of the “TECHNICAL PROPOSAL” sub-folder, the Committee shall organize closed meetings for the evaluation of the technical proposals of Tenderers who have been accepted in the first stage of the tendering procedure.

The technical proposal evaluation is based on the contents of the "TECHNICAL OFFER" sub-folder. Tenderers may be asked to analyze their proposal orally to the Tendering Committee and answer any questions of its members.

Technical Proposals, the assessment of which led to less than 65 points or have awarded with 0 points at criterion No.3, shall not be evaluated further.

To complete this task, the Committee may communicate in writing with the Tenderers and ask for clarifications. Clarifications that are submitted voluntarily by the Tenderers at any time after the deadline for submission of tenders shall not be accepted and shall be rejected as unacceptable. In no case shall the Tenderers modify their proposal or submit a counter-proposal.

The opening of the "FINANCIAL OFFER" sub-folder is followed by a notice of financial reporting. The envelopes containing the financial proposals that were not considered acceptable during the evaluation of technical and other data shall not be opened but returned to the participants.

The Tendering Committee, after the evaluation of proposals, shall report the final ranking of the proposals submitted during the tendering procedure and advise the competent body of CRES.

## **7.6. Administrative Appeals - Temporary Legal Protection**

- a. against the Tender,
- b. against the participation of a Tenderer,
- c. against the legality of the tender until the award of tender and,
- d. against the decision for contract award.

The appeals are **submitted in writing** to the Contracting Authority as follows:

- a. **Against the Tender**, within the first integer half (rounded up) of the time interval between the Tender publication and the deadline for the submission of proposals. This deadline is defined under consideration of the publication and the proposal submission dates. The decision on the appeal acceptance or rejection is issued by the Contracting Authority at the latest five (5) working days prior to the date of the Tendering Procedure.
- b. **Against the participation of a Tenderer or against the legality of the tendering procedure** in regards with the receipt and opening procedure of the proposals, during the tendering procedure and within the next working day.

In this case, the appeal shall not lead to tender postponement or suspension. The appeal is examined by the Contracting Authority that shall decide at the latest within ten (10) days after the deadline for appeals submission.

The appeal against the participation of a Tenderer will be necessarily communicated to the Tenderer in question, within two (2) days after its submission.

- c. **against the legality of the tender until the award of tender**, within three (3) working days from the time that the interested person became aware of the act or omission of the Contracting Authority.

In this case, the appeal is necessarily communicated within two (2) days after its submission against whom it is submitted. The appeal shall be examined by the Contracting Authority, which shall decide not later than ten (10) days from the deadline for appeals.

- d. Except for the aforementioned cases, against the decision for contract award, in regards with the legality and completeness of the documentation described in paragraph 4 within a period of three (3) working days after the interested person became aware of the award decision and the aforementioned documentation. The appeal is necessarily communicated within two (2) days from the date of the award decision to the Contractor. The appeal is examined by the Contracting Authority, which issues the relevant decision not later than ten (10) working days from the end of this three-day period. The decision on the appeal is immediately communicated to the objectors by the Contracting Authority. The objectors become fully aware of the decision, after it is communicated to them by the Contracting Authority, in their care.

Appeals submitted for any other reasons than the above are not accepted.

Appeals against decisions of contracting authorities before administrative or judicial authorities, concerning disputes arising during the proceedings before the conclusions of services contracts are governed by the provisions of Law 2522/97, as effective.

## **8. Selection of Contractor and Contract Conclusion**

The selection of Contractor will be based on the economically most advantageous proposal and in accordance with the specific terms of the present call.

The results of each phase of the tendering procedure, where no tenderers' representatives are attending, will be communicated in writing to all participants.

The Contracting Authority may cancel the tender at any stage and will not be liable for any compensation to the participants.

Under decision of the competent body of the Contracting Authority, the project is awarded to the Contractor.

After the award, a contract is concluded. The Contractor is called upon signing a contract with the Contracting Authority, which will be based on the decision for project award and the terms hereof. In the absence of desire or inability of the originally selected Contractor to sign the contract then he shall be revoked, the deposited financial guarantee is forfeited and the first runner-up is invited. No forfeiture of the financial guarantee is foreseen in the case of selection described in Article 2.1.5 (Part B) hereof.

The successful Contractor shall furnish, until the contract conclusion, as a guarantee for compliance with the terms of the contract, a performance guarantee of an approved institution, of an amount equal to 10% of the total contract value, excluding VAT. The performance guarantee shall be valid until its return to the Bank. The performance guarantee is returned to the issuing institution by order of the Contracting Authority after the final project receipt, provided that there are no pending obligations to the Contracting Authority on behalf of the Contractor.

## **9. Representation of the Contractor**

The Contractor shall designate a representative who shall be authorized by a special mandate to sign the contract, to represent the Contractor to the Contracting Authority and to act at the behest and on behalf of the Contractor for all matters related to the contract. Furthermore, a deputy representative with the same responsibilities shall be designated. Any change of the person or the address of the representative and/or the deputy representative is communicated in writing to the Contracting Authority and comes into effect after the written approval of the latter.

The Contractor's representative and deputy representative are, inter alia, authorized to represent him in all matters in regards with the contract and settle on the Contractor's behalf any dispute arising from or related to the contract, participating when and where invited in meetings with the Contracting Authority's competent bodies for monitoring and verification.

## **10. Monitoring – Receipt of the Contractor's Project**

Under decision of the competent body, CRES shall constitute a Committee for the Monitoring and Receipt of the Contractor's Project (PMRC).

During the entire period of the contract, the Contractor's Project shall be monitored, guided and approved by the Contracting Authority based on relevant suggestions by the Project Monitoring and Receipt Committee and the Project Manager.

The Contractor shall be obliged to cooperate with the Committee for the Monitoring and Receipt of the project and facilitate the work of the personnel and partners of the Contracting Authority and the Project Monitoring and Receipt Committee.

The Project Monitoring and Receipt Committee is responsible for the monitoring, evaluation and verification of the specific actions and the entire Contractor's project, as well as assembling protocols regarding temporary and final receipt of the project.

A detailed description of the performance, monitoring and receipt of the project shall be included in the Contract between Contractor and Contracting Authority.

## **11. Payments**

Payments, in the framework of the project, will be realized under decision of the Contracting Authority and through a relevant receipt protocol issued by the Project Monitoring and Receipt Committee, which will certify the good performance of each action and the relevant costs incurred.

The Contractor shall bear all the legal insurance contributions and deductions regarding legal entities or other bodies that, according to the Law, are borne by the Contractor.

All payments shall be accompanied by the issuance of the required legal documents. Each invoice issued by the Contractor shall bear all legal deductions, in accordance with all effective laws and relevant circulars of the Ministry of Economy and Finance.

The payment shall be executed on a partial basis as follows:

- Pre-financing equal to 20% of the total amount of the Contract (excluding VAT), if requested. Pre-financing is subject to interest and shall be executed under provision of a Financial Guarantee, equal to the amount of the pre-financing and composed according to the Compulsory Form provided in the Annex. The calculation of the interest shall be made under consideration of the interest rate of Treasury Bills of 12 months as in effect on the date of the pre-financing increased by 0,25 percent.
- Payment equal to 20% (or 40% in case no pre-financing has been performed) of the total amount of the Contract after receipt and approval of Deliverables D1 to D4 by CRES, as well as the First Project Progress Report (in accordance with Chapter 2 hereof).
- Payment equal to 30% of the total amount of the Contract after receipt and approval of Deliverables D5 to D11 by CRES, as well as the Second Project Progress Report (in accordance with Chapter 2 hereof).
- Payment equal to 30% of the total amount of the Contract after receipt and approval of Deliverables D12 to D15 by CRES, as well as the Final Project Report (in accordance with Chapter 2 hereof) and Project Receipt.

## **12. Confidentiality**

Without prior written consent of the Contracting Authority, the Contractor shall not disclose confidential information obtained or discovered by him during the implementation of the Project, neither communicate data, documents and information received in relation to the Contract, and shall ensure that his personnel, subContractors and any other person cooperating with him fulfils the aforementioned obligation. In case of default of these obligations by the Contractor, the Contracting Authority is entitled to claim compensation for any loss, suspension of disclosing confidential information and its omission in the future.

The Contractor shall not proceed to public statements relating to the project without prior consent of the Contracting Authority, neither participate to activities incompatible with his obligations towards the Contracting Authority and shall not commit the Contracting Authority in any way without prior written consent.

During project implementation, the Contracting Authority shall not communicate to anyone, except to persons who are entitled to know, information brought to it during and in connection with the execution of the project and related to technical and commercial operation issues of the Project or the Contractor.

## ANNEX

# COMPULSORY FORM 1: PARTICIPATION LETTER OF GUARANTEE

## PARTICIPATION LETTER OF GUARANTEE

Issued by (Name of Bank, branch): .....

Issue date: .....

To: Full details of Awarding Authority

CENTER FOR RENEWABLE ENERGY SOURCES AND SAVING (CRES)

19<sup>th</sup> km of the Marathonos Avenue. GR 190 09 Pikermi, GREECE

Issue Date,.....

**Our letter of guarantee no..... to the amount of Euro .....**

It is our honor to inform you that, by means of this present letter, we guarantee irreversibly and unconditionally, waiving of any right to division or excussion, up to the amount of EURO .....€

in favor of Company .....or in the case of an consortium or joint venture of companies a).....b) ....., individually for each one of them, as well as severally and jointly between them, in their capacity as members of the consortium or joint venture, for their participation in the tender held for selecting the Contractor of the project **“Conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption”**, in accordance with your Invitation to Tenders

This present letter of guarantee shall cover only obligations of the Company in question arising from the above Tender, throughout its effective period.

We are keeping the above amount at your disposal and it shall be paid to you entirely or in installments, without any objection or question on our part without making an investigation as to the validity or not of your claim within three (3) days from receiving a simple written notification from you.

This present guarantee shall be valid until three (3) months after the expiry of the effective period of the offer (until.....).

(Authorized Signature)

## COMPULSORY FORM 2: GOOD PERFORMANCE LETTER OF GUARANTEE

### GOOD PERFORMANCE LETTER OF GUARANTEE

Issued by (Name of Bank, branch): .....

Issue date: .....

To: Full details of Awarding Authority

CENTER FOR RENEWABLE ENERGY SOURCES (CRES)

19<sup>th</sup> km of the Marathonos Avenue. GR 190 09 Pikermi, GREECE

Issue Date,.....

**Our letter of guarantee no..... to the amount of Euro .....**

It is our honor to inform you that, by means of this present letter, we guarantee irreversibly and unconditionally, waiving of any right to division or excussion, up to the amount of EURO.....

in favor of Company .....or in the case of an consortium or joint venture of companies a).....b) ....., individually for each one of them, as well as severally and jointly between them, in their capacity as members of the consortium or joint venture, for the good performance of the agreement pertaining to the tender of ..... relating to **“Conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption”**, in accordance with your Invitation to Tenders

We are keeping the above amount at your disposal and it shall be paid to you entirely or in installments, without any objection or question on our part without making an investigation as to the validity or not of your claim within three (3) days from receiving a simple written notification from you.

This present guarantee shall be valid until returned to us or until you notify us in writing that we can consider our Bank free from any relevant obligation but no later than twenty four (24) months from the issue (.....)

(Authorized Signature)



# COMPULSORY FORM 3: ADVANCE PAYMENT LETTER OF GUARANTEE

## ADVANCE PAYMENT LETTER OF GUARANTEE

Issued by (Name of Bank, branch): .....

Issue date: .....

To: Full details of Awarding Authority

CENTER FOR RENEWABLE ENERGY SOURCES AND SAVING(CRES)

19<sup>th</sup> km of the Marathonos Avenue. GR190 09 Pikermi, GREECE

Issue Date,.....

**Our letter of guarantee no..... to the amount of Euro .....**

It is our honor to inform you that, by means of this present letter, we guarantee irreversibly and unconditionally, waiving of any right to division or excussion, up to the amount of EURO .....

in favor of Company ..... or in the case of an consortium or joint venture of companies a)....., b) ....., individually for each one of them, as well as severally and jointly between them, in their capacity as members of the consortium or joint venture, for collecting a Advance Payment corresponding to ..... % o the contractual price, of Euro ....., pertaining to an agreement relating to **“Conduction of market surveys, statistical analysis and methodology for the assessment of energy efficiency, in the final energy consumption”**, in accordance with your Invitation to Tenders

We are keeping the above amount at your disposal and it shall be paid to you entirely or in installments, without any objection or question on our part without making an investigation as to the validity or not of your claim within three (3) days from receiving a simple written notification from you.

This present guarantee shall be valid until returned to us or until you notify us in writing that we can consider our Bank free from any relevant obligation.

(Authorized Signature)

.....

**COMPULSORY FORM 4: FINANCIAL PROPOSAL Form**

**FINANCIAL PROPOSAL**

*INVITATION TO TENDER:.....*

**To : CENTER FOR RENEWABLE ENERGY SOURCES and Saving (CRES)**

Date: .....

The hereby signing party (ies):

.....  
.....  
.....

acting as the lawful representative(s) of the Bidder:

.....  
.....  
.....  
.....

according to the authorizations / orders of representation attached to the present Offer we state and offer the following:

**A. Statements**

A.1 In order to formulate our offer we studied carefully:

a. The Tender Documents

Including the regulations, codes, standards, specifications and other directives referred to in the above mentioned documents.

b. The Greek State Legislation.

c. The restrictions as described in the above mentioned documents and result from the local conditions of the works.

- A.2 We are aware of all data included in the contract documents for the execution of the works.
- A.3 We explicitly acknowledge the effect of the commercial conditions of the Tender Documents.
- A.4 Our Financial Offer was formulated according to all mentioned in the previous paragraphs.
- A.5 We shall complete the works within 22 months from the signing of the **Agreement**.

**B. Offer for the Project Execution**

For the complete execution of the works, within the time period, as analytically described in the Inquiry Documents and under the conditions listed in the said Documents

We Offer:

WORK PACKAGE	FINANCIAL PROPOSAL IN EURO (EXCL. VAT)
<i>WP 0: Project Management</i>	
<i>WP 1: Design of a methodology for data retrieve &amp; processing</i>	
<i>WP 2: Mapping and analysis of the current state</i>	
<i>WP 3: Data collection methodology</i>	
<i>WP 4: Design of market surveys</i>	
<i>WP 5: Conduction of market surveys</i>	
<i>WP 6: Primary data processing from surveys and provision</i>	
<i>WP 7: Organization and provision of final datasets</i>	
<i>WP 8: Complete proposal for collection of data</i>	
	<i>Total (exc. VAT)</i>
<i>The Total Lump Sum is the Amount of (inc. VAT):</i>	

Above Total Lump Sum Amount includes charges and expenses of any kind of the Contractor in relation to his obligations resulting from the Tender Documents, Contractor's Profit, as well as any expense resulting from the conditions of the Tender, even if it is not explicitly referred to in the Tender.

Above Total Lump Sum Amount shall be Contractor's full compensation for all costs associated with the execution of the works under the Agreement and will remain firm and stable for the whole duration of the Agreement.

Contractor shall provide all documentation that may be required by the Greek Authorities.

**C. Validity**

Our Offer is valid for a period of six (6) months from the Bid due Date.

(Authorized Signature and official stamp)