



Invitation to tenders

for open competition below the EEA threshold

when procuring:

Study of distributed energy production and self-consumption in the Nordics

Deadline:

August 31, 2018, 14:00 CEST

Distributed energy production and self-consumption in the Nordics

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1. Introduction

1.1 About the contracting authority

Nordic Energy Research (NER) is a platform for cooperative energy research and policy development under the auspices of Nordic Council of Ministers. We fund research and development to promote a sustainable future and contribute to policy-making.

The Working Group for Renewable Energy (AGFE) is helping and supporting the Nordic countries' political and professional work in renewable energy. AGFE is appointed by the Nordic Council of Ministers. NER is providing the administrative services for AGFE.

1.2 The assignments objectives and content

Distributed electricity production and self-consumption is increasing as an alternative and a supplement to conventional, centralized electricity production. The main purpose of the project is to provide useful decision support for governments and stakeholders by

- establishing an overview of the development of distributed electricity production and self-consumption in the Nordics.
- analysing and describing the effects of such developments on system integrity, production volumes and profitability.
- identifying national and/or common Nordic challenges or barriers to increased self-production and consumption of energy.

The findings of the project will be presented in a final report. A workshop will be organised by the consultant in cooperation with AGFE to contribute to the final report.

1.2.1 Background for assignment

The proposal for a revised EU-directive on renewable energy (RED II) addresses self-consumption and renewable energy communities. More information about the development and effects of distributed electricity production and self-consumption in the Nordics (including non-EU countries Iceland and Norway) will be useful to governments and stakeholders. Negotiations on the amendment of the Renewable Energy Directive (RED) indicate that member states may have to report on self-consumption. The study could, in part, guide possible future reporting requirements.

The Nordic Council of Ministers is funding this project.

1.2.2 Objectives

- 1) The study will give an overview of existing relevant studies.
- 2) The study will describe the size of distributed electricity production/self-consumption in the Nordic countries, historical growth and future growth scenarios.

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- 3) The study will describe the different regulations/policies in the Nordic countries towards distributed electricity production/self-consumption and to what extent this issue is covered in national energy and climate strategies. This includes a review of a legal frameworks, tax and support schemes concerning distributed electricity production and self-consumption in Nordic countries.
- 4) The study will describe the effects of distributed electricity production/self-consumption, in particular, describe the effects of distributed electricity production/self-consumption in a predominantly renewable electricity system (Nordic) vs. a predominantly fossil-based electricity system.
- 5) The study will assess the importance of local storage in relation to distributed electricity production/self-consumption (batteries, local thermal storage, storage in car batteries).
- 6) The study will also identify national and/or common challenges or barriers to a sound development, such as legal frameworks, grid impact, tax and incentive schemes.

Initial phase of the project:

The consultant is invited to prepare a tentative list of what they consider to be key components and their subsequent analysis. This will be discussed with NER/AGFE when closing the consultancy contract.

The study phase of the project:

The objective of this phase is to analyse the key components that are selected by AGFE based on the consultant work in the initial phase.

Communication: The results will be discussed at a workshop to be organised by the consultant and hosted by AGFE. The venue (in one of the Nordic capitals) will be decided later. The content and the target audience to be invited should be prepared by the consultant in dialogue with AGFE and NER.

The consultant will prepare a final report that also captures key lessons learned during the workshop. The final report will be published in English as a web version in NER website and/or printed report.

1.2.3 Content

The study should be presented in a draft report with data and description of the situation in the different Nordic countries, including national and/or barriers in the Nordic countries (objective 1-6 in section 1.2.2), and a final report.

The description of national developments should reflect current status and also deployment since 2005. Assumptions must be explained. An executive summary in English and in one of the Nordic languages should be included in the final report.

The expenses for the consultants' preparations and participation at the workshop (working hours, travel and accommodations) are covered by the budget referred to in 1.2.7.

1.2.4 Method

It will be up to the consultant to define an approach and suitable methodology (including materials and data) for this assessment.

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1.2.5. Preliminary timeframe & deliverables for the project execution

Action	Deliverable	Date	Responsible
Deadline for submission of tender	Tender	August 31, 2018, 14:00 CEST	AGFE/NER
Start-up meeting (online)	Guidelines for the project work	October 4, 2018	AGFE/NER
Study phase	Interim Report		Consultant
If needed, consultation with relevant stakeholders Workshop Review of findings from the study phase	Workshop and summary of the findings from the workshop	Feb/March 2019	NER in dialogue with AGFE and Consultant
Project report	Draft report	April 2019	Consultant
Project report	Final report	May 2019	Consultant/NER To coincide with AGFE - meeting

The start-up meeting will take place in one of the Nordic capitals. It may be organized as a video-conference. Further video conference meetings may be organised if deemed necessary during the implementation phase.

Final timetable will be agreed upon at the start-up meeting.

Members of AGFE will serve as the project steering committee. However, the consultant will be responsible for the content and conclusions of the final report.

The content of the report and the target audience to be invited to the workshop should be prepared by the consultant in dialogue with AGFE and NER.

1.2.6 Use of the report and the results

The main target groups are decision-makers and policy planners. The final report will be made publicly available.

1.2.7 Value of the assignment

The total cost of the tender may not exceed 800 000 NOK, VAT included. All expenses should be included.

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1.2.8 Contract

A contract will be established with the awarded consultant.

The consultant may use subcontractors to specific tasks, but it will be the consultant who has the entire responsibility with regards to deadlines, quality assurance and financial management etc. vis-à-vis the purchaser.

1.3 Announcement of the tender and winning bid

The invitation to tender and announcement of winning bid will be made public on Doffin and TED, as specified in Chapter 2.5.

2. Administrative regulation

2.1 Purchase procedure

The procurement directive is not directly applicable to Nordic Energy Research as an international organization located in Oslo. Consequently, only the general principles of the EU/EEA will apply to this procurement process.

The purchase procedure will be executed in an open competition according to the main principles of FOA, part I. This procedure allows all potential suppliers to bid.

2.2 Requested structure of the competition

The competition will be based on:

- this document, containing information about the content, procedures and frames describing the process until the award and signing of the contract and
- the appendices as presented below.

Appendices:

Appendix A: HES declaration

Appendix B: Tender

Appendix C: Disclaimer and Deviation

Appendix D: Consultancy Agreement Draft

Appendix E: Standard Terms of Contract for Consultants

Appendix F: European Single Procurement Document (optional)

2.3 Contact information

Contact person concerning this purchase will be Svend Søyland at Nordic Energy Research.

E-mail: svend.soyland@nordicenergy.org

2.4 Language

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All communication, written and oral, regarding this matter should be made in English. This also applies for the tender itself. Possible juridical questions must be communicated in a Scandinavian language.

The reports must be in English, with summaries in a Scandinavian language.

2.5 Execution of the tendering process

Activity	Date	
Announcement in Doffin and TED	June 20	
Deadline for questions concerning the invitation to tender	July 11, 14:00 CEST	3 weeks
Deadline for tender	August 31, 14:00 CEST	
Opening of tender	August 31, 16:00 CEST	
Evaluation	September 13	At AGFE meeting.
Award of Contract	September 20	
Waiting period		2 weeks
Contract signing	October 4	

2.6 Correction, addition and/or change of the competition

Before the deadline of the competition, the purchaser is entitled to make corrections, additions or changes to the competition that are not significant.

2.7 Questions for the competition

Any questions the suppliers may have for the competition must be received by the deadline indicated in the schedule 2.5.

Questions must be sent by e-mail to the contact person of the competition as indicated in 2.3. All questions will be answered anonymously and made available for all who have registered to receive the competition on Doffin and TED in due time before the deadline of the competition.

2.8 The participation costs of the supplier

Any costs that the supplier may have in connection with the preparation, delivery or follow-up of the tender and the procurement process will not be refunded.

Participation in the tendering process will in no way commit the purchaser to enter into a contract with the supplier or involve the purchaser in financial obligations.

2.9 Return of tender

The purchaser will not return the tender of the supplier.

3. Wages and working conditions

If this competition includes services or construction work in accordance with Regulations of February 8, 2008 no.112 on "Wages and working conditions in public contracts", separate requirements and remedies related to this apply, cf. part 2 of Contract.

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4. Confidentiality and disclosure

4.1 Confidentiality

Information that the parties become acquainted with regarding the competition and implementation of the contract shall be treated as confidential and not made available to any third party without the consent of the other party.

5. Requirements for the tender

5.1 Structure of the tender

The tender should contain the following documentation that should be structured acc. to the following sectioning.

Section no.	Documentation
1.	Tender which should include the following: 1.1 Reference to the name of the competition 1.2 The address, phone number and e-mail address of the supplier 1.3 The contact person of the supplier and his/her phone number and e-mail address 1.4 Confirmation of the validity of the tender, cf. section 5.3. 1.5 Binding signature from a person with authority to sign on behalf of the supplier
2.	Documentation of eligibility 2.1 Tax certificates cf. section 7.2. 2.2 Health Environment and Safety (HES) declaration cf. section 7.2. 2.3 Documentation of the supplier's organizational and legal position ref. section 7.3. 2.4 Documentation of economic and financial position ref. section 7.4. 2.5 Documentation of technical and professional qualifications ref. section 7.5.
3.	Project description (including a draft work plan, a draft of the table of contents in the report, methods and preliminary list of data and materials to be used, see section 8.1) Format: Maximum 5 A4 format pages (Times 12 point 1,5 paragraph spacing). Other relevant information (it would be useful to have estimation of the number of work days by the consultant and price NOK/day)
4.	Any modifications or alteration to the competition or the contract ref. section 5.7. and Appendix C.

5.2 Delivery format

Tenders must be delivered by E-mail in PDF format and/or other Microsoft Office compatible format.

5.3 Validity

The tender must have a validity of a minimum of 90 days from the day of the deadline of the tender.

5.4 Contract

The supplier must base his tender on the enclosed contracts (Appendices D and E).

5.5 Tender for all or part of the delivery

It is not permitted to submit tenders for part of the delivery.

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5.6 Alternative tenders

It is not permitted to submit alternative tenders.

5.7 Reservations and amendments

Significant reservations and amendments shall be stated precisely and unambiguously so that the purchaser can evaluate the offer without contacting the supplier. Reservations and amendments shall clearly and unambiguously refer to the Appendix C and point in the tender documents and shall be annexed to the tender.

The supplier shall clearly specify the consequences that any reservations and amendments have or may have on the performance, price and/or other aspects of the tender.

5.8 Revocation of tender

A tender may be revoked or altered until the deadline of the tender. Revocation shall be done in writing. Change of the tender is considered a new offer.

5.9 Rejection of tenders

The rejection rules in FOA §§ 11-10 to 11-12 will apply. We urge the suppliers to make themselves familiar with these.

6. Delivery of tender

6.1 Deadline of tender

The tender must reach the purchaser no later than the deadline specified in section 2.5.

The deadline is absolute. Late submitted tenders will be rejected.

The supplier carries the risk of failure or delay in shipment.

6.2. Delivery method and delivery address

The tender must be delivered in the format specified in section 5.2.

Tenders should be delivered by E-mail to the following address:

fm@nordicenergy.org with the following subject line: **Distributed energy production – Tender**

7. Eligibility requirements

7.1 About the eligibility requirements

The supplier must meet the requirements listed below in-order-to be eligible for participation in the competition. Only qualified suppliers will have their tenders evaluated. The supplier is responsible for providing all documentation requested below as proof of the requirements imposed. Lack of documentation or incomplete information may lead to the rejection of the tender.

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7.2 Mandatory requirements

Requirements	Documentation requirements
The supplier should have orderly conditions with regards to payment of tax, payroll tax and VAT.	Tax certificates not older end six months calculated from the deadline of the tender. Tax certificates are: For Norwegian suppliers: Certificate for tax and value added tax (VAT) (RF-1244) For foreign suppliers: Foreign suppliers must submit corresponding certificates from their country showing that they have complied with tax matters.
For work to be performed in Norway, the supplier must fulfil Norwegian HES requirements.	Only for Norwegian suppliers: Completed and signed HES statement according to FOA appendix 2. Please use the attached template, see part appendix A.

7.3 Requirements for organizational and legal position

Requirements	Documentation requirements
The supplier shall be a legally established company	For Norwegian suppliers: Certificate of registration For foreign suppliers: Confirmation that the supplier is registered in a trade or business register acc. the legislation of the country where the supplier is established.

7.4 Requirements for economic and financial position

Requirements	Documentation requirements
The supplier shall have sufficient financial strength to fulfil the contract.	Excerpt from the supplier's annual report including notes with the report from the board and the auditor from the past two years.

7.5 Requirements for technical and professional qualifications

Requirements	Documentation requirements
The supplier must have previous experience on assignments regarding renewable energy production and self-consumption.	References from a maximum of 3 similar deliveries/assignments within the last 3 years. References shall at least contain: <ul style="list-style-type: none"> • A short description of the delivery • Implementation date • Scope of delivery and its price • Name and phone number of a contact person responsible for ordering

Option for self-declaration: Documentation regarding 7.2 – 7.4 can be provided by completing the European Single Procurement Document (ESPD), available as Appendix F. The formal documents will be required at a late stage in the evaluation process, for selected tender candidates.

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8. Award criteria and evaluation

8.1 Award criteria

The contract is awarded to the supplier who financially has the most favourable tender based on the below-mentioned criteria.

Award criteria	Documentation	Weight %
<p>Expected quality Project description in the proposed assignment including relevance, ambition, quality, organization and structure ref. section 1.2.1 – 1.2.7.</p>	<p>The project description shall include the following information:</p> <ul style="list-style-type: none"> • Workplan • Key questions and issues related to the project, and how those will be addressed • Project deliveries/milestones • Planned budget • Organization and structure of the project as well as for accountable persons for the separate part deliveries • Approach and choice of methodology and relevant modelling tools and data. • Data and information sources to be used. <p>The data shall be collected and presented in an accessible manner also for external interested parties.</p>	45
<p>Price of the assignment The total price is maximum NOK 800.000,- incl. VAT.</p>	<p>Price must be in NOK ex. VAT. This includes all costs required to execute the tender (i.e. salaries, travel costs etc.)</p>	10
<p>Offered expertise Offered expertise means the expertise and experience of the key personnel who is offered to implement this specific contract.</p>	<p>The supplier must present:</p> <ul style="list-style-type: none"> • CVs with an overview of expertise and experience from relevant previous projects for the named key personnel. • The main tasks and roles of each expert in the project • Contact details of the project manager 	45

8.2 Evaluation

All approved offers will be evaluated with scores per award criterion, where 10 is the highest and 0 the lowest. The overall result per criterion will be weighted according to the weighing degree above, ref. section 8.1.

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9. Termination of competition

9.1 Cancellation of competition and total rejection

The purchaser reserves the right to cancel the competition or to reject all offers, if there are reasonable grounds ref. FOA § 13-1.

9.2 Notification of the choice of supplier and waiting period

The purchaser informs all suppliers in writing and simultaneously about whom the purchaser intends to award the contract as soon as the choice of supplier is made.

The notification will include an explanation for the choice and specify the waiting period from the time the award is made known until the contract signing is planned (concluding the contract).

If the purchaser finds that the award decision is not in accordance with the criteria for the choice of supplier, the decision can be annulled until contract is signed.