



**EUROPEAN COMMISSION**  
Executive Agency for Small and Medium-sized Enterprises (EASME)

 Ref. Ares(2019)2366725 - 03/04/2019

Department A – COSME, H2020 SMEs and EMFF  
**Unit A1 – COSME**

## **CALL FOR TENDERS**

**N° EASME/2019/OP/0007**

**Study on the Development of an European Union Framework for  
Buildings' Digital Logbook**

**GRO-SME-18-F-117**

**TENDER SPECIFICATIONS**

***Open Procedure***

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## Study on the Development of an EU Framework for Buildings' Digital Logbook

### 1. TECHNICAL SPECIFICATIONS

#### 1.1. INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or "the Contracting Authority")<sup>1</sup>, acting under the powers delegated by the European Commission (referred to below also as "the Commission", or "the EC"), is launching this invitation to tender with a view to conclude a service contract for a study on the development of an European Union (EU) framework for buildings' digital logbook.

The call for tenders is based on Regulation (EU) no 1287/2013 of the European Parliament and of the Council of 11 December 2013 establishing a Programme for the Competitiveness of the Enterprises and small and medium-sized enterprises (henceforth "COSME") (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on the Commission Implementing Decision of 5 February 2018 on the financing of the support measures of the Programme for the Competitiveness of the Enterprises and small and medium-sized enterprises (COSME) for 2018 and its annex 1<sup>2</sup>.

#### 1.2. BACKGROUND INFORMATION AND CONTEXT

A lot of valuable information is generated and gathered over the life cycle of buildings at different stages (e.g. design, construction, operation, renovation, repair, upgrading) and for various purposes (e.g. regulatory compliance, cost management, operation and management, insurance, finance). This wealth of information could be highly beneficial for property, asset and facility management if it were easily available and structured. However, this information is largely not organised and managed in a systematic way. Some information only benefits few market players; sometimes information has to be re-created several times and often almost none stays in the hands of property owners. Information is spread over many places and tools for safely storing, digitising and updating information are largely missing<sup>3</sup>.

This situation leads to a lack of transparency and limited availability of information to assess building performance and asset value, and the risks related to investment and management decisions in sustainable construction. It also reduces the chances of contractors and building managers to learn from experience and good practice, because of possible different reporting formats. Limited data availability creates also difficulties for financing institutions, banks and investors to gain information on risk profiles, so as to adapt their risk management strategies accordingly and to develop financial instruments.

Digital building logbooks could boost the availability of structured information for a number of purposes to a broad range of market players, including property owners, tenants, investors,

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<sup>1</sup> EASME was set up by Commission Implementing Decision (2013/771/EU) of 17 December 2013 establishing the "Executive Agency for Small and Medium-sized enterprises" and repealing Decisions 2004/20/EC and 2007/372/EC (OJ L 341 of 18.12.2013). EASME replaces and supersedes former Executive Agency for Competitiveness and Innovation (EACI).

<sup>2</sup> Commission Implementing Decision C(2018) 578 final: <https://ec.europa.eu/docsroom/documents/27922>

<sup>3</sup> Et.al. "Global trends in data capture and management in real estate and construction", RICS, Nov. 2017 – see [rics.org/insight](https://rics.org/insight)

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financial institutions and public administrations, as mentioned in the Clean Energy Package<sup>4</sup> of November 2016.

A digital building logbook is a digital repository where a building's main properties (ownership, building design, materials used, structures, installations, systems, adaptations, investment, operational and maintenance costs, health and safety, performance indicators, certifications, etc.) can be compiled and updated when necessary throughout the life of the building, granting an easily accessible and comparable overview of a specific building. Further information like energy bills, water and waste management, maintenance recommendations/requirements as well as insurance and ownership obligations could be included.

The building logbook could facilitate access to structured information about how the building was originally designed, what changes have been made and what is its actual performance service level and planned maintenance. It may draw upon information from other sources such as construction standards and calculation methods originally used, building information models, building's operation, maintenance, health and safety records/action plans, energy certificates/audits, environmental performance assessments, etc.

Ownership of the information contained in the digital building logbook stands with property owners. However, this information could be made fully or partly accessible to third persons (e.g. authorities, maintenance professionals, valuation professionals, insurers, etc.)

### **1.3. GENERAL AND SPECIFIC OBJECTIVES**

EASME wishes to enter into a service contract for a study aiming to develop an EU framework to support and structure the widespread use of digital building logbooks in the EU Member States. The overall aim is to increase data availability and transparency on buildings' related properties to a broad range of market players, including property owners, tenants, investors, financial institutions and public administrations. The expected impacts of digital building logbooks include the increase of structured information altogether and the reduction of information asymmetries along the building supply chain and the building life cycle, which will improve cost management, facilitate decision-making and building operation and maintenance, renovation, assessing mortgage and insurance-related risks, and improved energy and environmental performance. It will reduce significantly the need to recreate information over the life cycle of the building.

The use of digital logbooks might entail certain risks such as:

- An increased administrative burden for owners and professionals;
- Uneven distribution of costs and benefits, since those who collect/provide the data are often not those who later benefit from it;
- High operation and maintenance costs of the supporting digital environment;
- Legal concerns (data protection rights, liability questions for false data);

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<sup>4</sup> COM(2016) 860 "Clean Energy for All", Annex 1 "Accelerating clean energy in buildings", page 10: "Digital technologies have the potential to raise efficiency of construction processes and the operation of buildings, thus contributing to our energy saving objectives. [...] Together with the development of a common framework for a digital building logbook and specific actions targeting SMEs, this makes it much easier to exchange information and support decision-making before, during and after construction projects, avoid a fragmentation of competing national strategies and cut the costs for SMEs"

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- Uncertainty on how to assure high quality and reliability of data;
- Inconsistency and lack of comparative ability (benchmarking) between different formats of digital logbooks, generating confusion, discrepancies and mismanagement of data.

Therefore, the specific objectives of this study are to address the following questions regarding the development and functioning of digital building logbooks:

- Who are the involved stakeholders?
- Which market needs will building logbooks address in the first place?
- What are the key roles and responsibilities of market participants along the value chain to achieve increased confidence in data quality and transparency?
- What kind of digital framework is needed to facilitate this information exchange? How could it be integrated with Building Information Modelling (BIM)?
- What are the current and possible future business models, taking into account related costs (e.g. administrative and maintenance costs)?
- Who should/could have access to information and data of the digital building logbooks, under which conditions and for what kind of format?
- What would be the impacts of digital building logbooks in terms of information accessibility, information transparency on buildings’ performance, quality assurance for buildings operation, maintenance and renovation/refurbishment, supporting property valuation and financial analysis? How to achieve the fair distribution of benefits created by a digital building logbook?
- What are the unintended or negative effects that the widespread use of digital building logbooks could cause?
- Considering existing national and private systems related to building logbooks, is there a need for a European approach for data collection and management? How will it strengthen existing systems or support the introduction of new systems elsewhere? What would be the benefits of supporting information exchange at national and European levels? Which concrete steps should the Commission undertake to support the logbook approach?
- How would such an initiative fit into the existing EU policy framework and connect to other current initiatives (Energy Performance Certificates<sup>5</sup>, European Voluntary Certification Scheme (EVCS)<sup>6</sup>, Smart Readiness Indicator<sup>7</sup>, building renovation passports<sup>8</sup>, Level(s)<sup>9</sup>, construction and demolition audit guidelines<sup>10</sup>, green public procurement toolkit<sup>11</sup>, etc.)?

In this respect, the study will perform a mapping of current practice and review relevant public and private initiatives promoting the use of building logbooks in order to identify business models, key points for good practice with respect to usage, data management and digitalisation of building logbooks and the critical gaps that still needs to be addressed in these domains.

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<sup>5</sup> <https://ec.europa.eu/energy/en/topics/energy-efficiency/buildings/certificates-and-inspections>

<sup>6</sup> <https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/cost-benefit-analysis-voluntary-common-european-union-certification-scheme-evcs>

<sup>7</sup> <https://smartreadinessindicator.eu/about-us>

<sup>8</sup> <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=3644>

<sup>9</sup> <http://ec.europa.eu/environment/eussd/buildings.htm>

<sup>10</sup> [http://ec.europa.eu/environment/waste/construction\\_demolition.htm](http://ec.europa.eu/environment/waste/construction_demolition.htm)

<sup>11</sup> [http://ec.europa.eu/environment/gpp/index\\_en.htm](http://ec.europa.eu/environment/gpp/index_en.htm)

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Based on this analysis, the study will also assess whether an EU-wide common approach:

- Should be voluntary or mandatory;
- Could facilitate the launch of building logbook initiatives, where such systems do not exist, without invalidating the already existing schemes in other Member States ;
- Could address the critical gaps identified beforehand.

The study will define the scope and focus of the EU framework, and propose a concrete action plan to be implemented. An appropriate consultation strategy of stakeholders should ensure the success of the study and the uptake of the proposals.

#### 1.4. TASKS AND GEOGRAPHICAL SCOPE

##### 1.4.1. Tasks

To meet the objectives mentioned in section 1.3, the contractor must perform the following tasks:

##### ***Task 1: Conceptual definition of digital building logbooks***

This task will clarify the role and scope of digital building logbooks with respect to the various types of information sources and tools used or potentially applicable for property, asset and facility management, such as the building information template, the building operational and maintenance manual, the health and safety file, the asset management plan, the energy performance certificate, the smart readiness indicator<sup>12</sup>, the building renovation passport<sup>13</sup>, the building materials passports, etc.

The types of buildings covered must include at least office buildings, individual houses and multi-apartment buildings.

Based on a desk review and interviews with experts from the various segments of the construction value chain, the contractor will define the key functions that digital building logbooks should fulfil according to various types of buildings and identify the key data management aspects to be tackled. The contractor will carry out at least 15 Interviews covering the following parts of the value chain: property owners, real estate sector, financial institutions, material/equipment supplier, architects, engineers, contractors, facility management and regulatory bodies.

More specifically, the contractor will identify for each type of buildings (i.e. at least office buildings, individual houses and multi-apartment buildings)

- the type of information that digital building logbooks should contain or rely on;
- the type of information that could be generated from digital building logbooks for various purposes<sup>14</sup>, respectively for property and asset managers and for third parties;

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<sup>12</sup> The development of this instrument has started following the publication and entry into force of the revised Energy Performance of Buildings Directive 2010/31/EU as amended by Directive (EU) 2018/844.

<sup>13</sup> A parallel study will analyse the relevance, feasibility and possible scope of measures at EU level for the promotion of building renovation passports. For further details, please refer to tender ENER/C3/2018447/05 (<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=3644>)

<sup>14</sup> E.g. regulatory compliance, investment, operation and management, insurance, finance, resource and energy efficiency, etc.

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- the architecture of the digital support, including the role of BIM wherever appropriate;
- the approach necessary to ensure legality of data collection, the quality control of the information sources/flows and respect of data protection rules.

This task will deliver a conceptual definition of the functionalities and data management approach for digital building logbooks for each type of building. Both new construction and existing buildings should be considered in the conceptual definition.

#### ***Task 2: State of play and review of national/sectorial initiatives promoting the use of building logbooks***

Under this task, the contractor will analyse the state of play with the uptake of building logbooks for the types of buildings identified in Task 1. The analysis will highlight in which circumstances building logbooks are most used, the purposes for which they are mostly intended for and the current level of digitalisation of data management and analytics. The contractor will also analyse the current practice with respect to information quality control and data sharing between property/asset managers and third parties, such as, professional bodies, public administration and financial institutions.

Moreover, the contractor must perform a critical review of national and sectorial initiatives, including relevant regulatory frameworks, promoting the use of building logbooks which will highlight what worked best in which circumstances and more generally identify the success factors of the initiatives. The review will also present an overall appraisal of the benefits of the initiatives from the perspective of the property and asset managers, and the other actors of the construction value chain.

The tenderers must propose in their bids a set of criteria to select the countries, practices and initiatives relevant for such a review. The selection will consider whether the experience from non-EU/non- COSME countries (e.g. the United States (US), Japan, Canada) could be valuable for the analysis and the review. Moreover, the contractor will also compare the relative effects of commercial-based information sources or data management services versus free-charge schemes. Lastly, in doing this review, the contractor will make sure to build on related research work, in particular the state-of-the-art review performed in the scope of the feasibility study on building renovation passports<sup>3</sup>. The so proposed set of criteria will be definitively agreed with the contracting authority during contract implementation.

The contractor must present the results of the mapping and of the review in a way that facilitates the understanding of the context, success factors and shortcomings of the various practices and initiatives. The deliverable will be a stand-alone report, which describes the method followed to identify relevant practices and initiatives, the list of references consulted and the main conclusions of the mapping and review. The results will be included in the first interim report.

#### ***Task 3: Gaps analysis***

Based on the results of Tasks 1 and 2, the contractor will analyse the gaps that still have to be addressed at EU, national, regional and sectorial levels to ensure a widespread use and efficient functioning of digital building logbooks for each type of buildings dealt with in task 1. The contractor will identify the actions that would best address the gaps, taking into account the characteristics of the building types identified in task 1 and the possible role of BIM. The actions should not be limited to those that the European Commission could carry out. Possible ideas could be:

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- Standardisation of data collection, management and digitalisation;
- Guiding principles and rules for setting up or strengthening national systems for building logbooks;
- Definition of a 'core' building logbook concept, i.e. the basic structure and content of a logbook;
- Definition of industry-wide protocols increasing the interoperability and inter-usability of databases related to building logbooks;
- National portals to share information related to building logbooks;
- Interconnection of national registers containing building related information;
- Legislative measures to enforce the implementation and use of digital building logbooks.

The contractor must identify a list of at least 10 actions, together with a qualitative assessment of the feasibility, added value and resources needed for each action, potential synergies with existing building logbooks related initiatives, including the shared-effort between the European Commission, national administrations and professional organisations.

#### **Task 4: Recommended Commission actions**

From the list of actions identified under Task 3 above, the contractor must prepare a proposal identifying the 3 to 4 priority actions that the European Commission could carry out or support, together with a well-grounded reasoning for the choice of the actions.

The proposal should include concrete, practical and sustainable actions and be accompanied by a feasibility evaluation (SWOT and resources needed vs. value added) for each action.

The contractor will take into account existing initiatives at EU level or international level, the Commission or elsewhere and propose synergies with these. In particular, the contractor must consider the links with:

- The basic works requirements described in the Construction Products Regulation (EU) No 305/2011<sup>15</sup>;
- The feasibility study on the possible introduction of an optional building renovation passport in the context of the Energy Performance of Buildings Directive<sup>16</sup>;
- Energy Performance Certification and Smart Readiness Indicator under the Energy Performance of Buildings Directive<sup>17</sup>;
- The work carried out for Product Environmental Footprints (PEF) regarding data quality and comparability<sup>18</sup>;
- The EU framework Level(s) for the assessment of the environmental performance of buildings<sup>19</sup>;
- The research work carried out for a European wide voluntary certification scheme for non-residential buildings<sup>20</sup>.

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<sup>15</sup> [https://ec.europa.eu/growth/sectors/construction/product-regulation\\_en](https://ec.europa.eu/growth/sectors/construction/product-regulation_en)

<sup>16</sup> <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=3644>

<sup>17</sup> [https://eur-lex.europa.eu/legal-content/EN/TXT/?toc=OJ%3A%3A2018%3A156%3ATOC&uri=uriserv%3A0J.L\\_2018.156.01.0075.01.ENG](https://eur-lex.europa.eu/legal-content/EN/TXT/?toc=OJ%3A%3A2018%3A156%3ATOC&uri=uriserv%3A0J.L_2018.156.01.0075.01.ENG)

<sup>18</sup> [http://ec.europa.eu/environment/eussd/smgp/policy\\_footprint.htm](http://ec.europa.eu/environment/eussd/smgp/policy_footprint.htm)

<sup>19</sup> <http://ec.europa.eu/environment/eussd/buildings.htm>

<sup>20</sup> <http://publications.jrc.ec.europa.eu/repository/bitstream/JRC106003/kjna28615enn.pdf>

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- The work carried out by the EU BIM Task Group on the introduction of BIM in the public sector<sup>21</sup>
- The EN Eurocodes<sup>22</sup>;

The contractor will propose a detailed setup and roll out plan for each action, including a description of participants and beneficiaries of the actions, the management and financial structure, and an indicative timeline.

#### ***Task 5: Stakeholders consultation***

This task concerns the consultation of relevant stakeholders (e.g. owner-occupiers/landlords; financial institutions, investors and fund managers; construction professionals and real estate advisory services providers; developers/contractors; material/equipment suppliers; public authorities) during the whole duration of the study.

The tenderers must specify in their bids the most suitable approach for consulting the stakeholders (e.g. interviews, on-line surveys, discussion during expert meetings, validation mechanisms, etc.) according to the tasks timing, contract duration and key deliverables. The contractor will ensure that the positions of stakeholders are reflected appropriately in the analysis and findings of the study.

In addition, the contractor must organise two stakeholders’ meetings in Brussels. The dates of these meetings will be decided at the kick off meeting, tentatively, 7 months after the start of the study (1<sup>st</sup> meeting) and 11 months after the start of the study (2<sup>nd</sup> meeting). Before submitting invitations to the relevant stakeholders, the contractor will draw up a list of potential participants (ca 20 experts per meeting), draft and agree with the contracting authority an agenda, take care of the meeting venue and any logistics (e.g. catering, equipment). The contractor will draft the minutes of the meetings and must provide a short report of the overall consultation with stakeholders in the final report. The contractor must cover all costs associated with organizing these meetings (noting that participants to the meetings will travel at their own costs). Any such costs must be included in the financial offer for this tender. No separate reimbursement will follow (see Section 3.7, Part E: Financial offer).

#### ***1.4.2. Geographical scope of the tasks***

In general, the services to be delivered will cover all the countries participating in the COSME programme<sup>23</sup>. For Task 2, the mapping of current practice and the review of national and sectorial initiatives may go beyond the countries participating in the COSME programme (e.g. US, Canada, Japan). For Task 2, the contractor may focus on specific EU Member States, but a representative geographical sample must be ensured in the analysis, including countries participating in the COSME programme but not members of the EU.

#### **1.5. INPUT BY THE CONTRACTING AUTHORITY**

This section is not applicable.

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<sup>21</sup> [www.eubim.eu](http://www.eubim.eu)

<sup>22</sup> <https://eurocodes.jrc.ec.europa.eu/>

<sup>23</sup> <http://ec.europa.eu/DocsRoom/documents/31602>

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### **1.6. GENERAL GUIDANCE ON METHODOLOGY**

The tenderers must propose in their bids an innovative and relevant methodology with coherent and well identified actions, human and technical resources allocation and efforts to address all the requirements for the tasks in the technical specifications (Section 1 of the tender specifications).

The contractor will be responsible for data collection and the generation of analysis, insights and recommendations through various means, including desk research and consultations with stakeholders who regularly advise, engage and deliver on public policies related to construction.

### **1.7. PERFORMANCE AND QUALITY REQUIREMENTS**

The contractor will plan, implement and monitor the project in order to execute it on time and within budget while delivering top quality results.

To measure the quality of the results, the key indicators include:

- Quality of the conceptual definition of the digital logbooks;
- Quality of the description and analysis of the state-of - art and of national/sectorial activities promoting the use of digital logbooks;
- The relevance of the actions proposed to tackle the gaps;
- The quality and operational value of the recommended EC actions;
- Qualitative opinion of stakeholders presented during the consultation and at the 2 meetings in Brussels;
- Expected level of acceptance for implementing the recommended actions.

The contractor will also adhere to the following performance indicators:

- Management of the tasks to planned milestones;
- Compliance with project aims;
- Timely and successful organisation of the meetings;
- Timely delivery of results, reports on progress and deliverables.

### **1.8. STARTING DATE OF THE CONTRACT AND DURATION**

The contract shall enter into force on the date on which it is signed by the last contracting party. The duration of the tasks shall not exceed 12 months from that date. The execution of the tasks shall not start before the contract has been signed. The work will follow the timetable detailed in section 1.10.4, below.

### **1.9. VOLUME OF THE MARKET**

The maximum amount for the execution of all the tasks referred to in this call for tenders is EUR 260.000 including all charges and expenses. No contract offer above this amount will be considered.

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### 1.10. PLANNING, OUTPUTS AND DELIVERABLES; MEETINGS

The contractor must provide the required deliverables, reports and documents in accordance with the conditions of the draft service contract. When requested in the contract the deliverables, reports and documents will accompany the invoices for payments.

Each deliverable (a report or other document) must be submitted in electronic format compatible with Word, in English. The final report must also be submitted in 3 copies in paper version with a translation of the summary into French and German.

The contractor must ensure that the deliverables, including the deliverables for publication (online and/or printed) must be of the highest linguistic quality. The deliverables shall be proofread and edited by a qualified English native speaker or someone with proofreading credentials and adequate linguistic skills.

Presentations to be made at the meetings to present the results of the contract are an integral part of the deliverables of the project. The details of the presentations will be agreed upon between the contractor and the Contracting Authority on an ad-hoc basis when preparing these meetings.

#### 1.10.1. *Intermediate outputs and deliverables*

The contractor must submit the following documents and deliverables to the contracting authority:

- An inception report (max 20 pages), which presents the practical details on the focus and scope of the study, the approach and methodology, the key deliverables and the detailed planning of activities and of the meetings, as agreed with the Contracting authority at the kick off meeting
- Deliverable 1: within 4 months after the contract signature, the contractor shall present the conceptual definition of the digital building logbooks (task 1) (max. 20 pages without annexes). This should include the challenges encountered during this phase and possible further work required to refine the conceptual definition.
- Deliverable 2: within 6 months after the contract signature, the contractor shall submit an interim report (max. 40 pages without annexes). It will cover:
  - The results of tasks 1, 2 and 3 as described in section 1.4.1 above;
  - A methodology proposal of how to identify the priority actions for the Commission (Task 4).
  - The problems and challenges encountered during this phase of the study, the way to address them and the impact on the remaining tasks.
  - A detailed planning of the remaining tasks to be carried out.
  - References of sources of information used or to be used and an analysis of the value of these sources, as appropriate.
  -

The interim report will be linked to the interim payment of 40%.

- Deliverable 3: within 9 months after the contract signature, the contractor shall present the recommended Commission actions (task 4) (max. 30 pages).

#### Monthly progress reporting

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To ensure a proper management and follow-up of the project by the contracting authority, the contractor must submit electronically short and concise progress reports (maximum 5 pages on a monthly basis, highlighting specifically the following elements:

- Short summary focusing on the status and the timely execution of the tasks;
- Issues affecting progress and corrective actions proposed with a revised timetable and work programme, if appropriate.

These monthly reports are not considered as formal deliverables but as useful and pragmatic tools to monitor progress.

#### **1.10.2. Final outputs and deliverables**

##### Draft final report

Within 10 months after the contract signature, the contractor shall submit a draft final report, which must include:

- The outcome of all tasks described in section 1.4.1 above (maximum 60 pages without annexes);
- An executive summary (maximum 6 pages);
- The recommendations to the Commission and possible next steps;
- Reference of sources of information used and analysis of the value of these sources, as appropriate.

##### Final report

Within 12 months after the contract signature, the contractor shall submit the final report in its definitive version, which must take into account the outputs of the stakeholders meeting foreseen in month 11.

The detailed structure, the size and the sections of the final report will be agreed with the contracting authority, based on a proposal from the contractor submitted 6 months after the start of the contract.

#### **1.10.3. Meetings**

A minimum of three meetings will take place with the European Commission and EASME in Brussels: a kick-off meeting to discuss work plan and methodology (within 2 weeks after the signature of the contract), an interim meeting (after 6 months) and a final meeting after 11 months.

After each meeting, the contractor will send the draft minutes within 15 calendar days.

Any travel and accommodation costs for such meetings shall be included in the fixed prices of the tenderer's financial offer. No additional reimbursement will follow.

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**1.10.4. Timetable**

The tenderer shall propose in its offer a detailed work programme, which clearly indicates the sequences and timing of the work. It shall take into consideration the following timetable elements:

<b>Timetable (months/weeks/days)</b>	<b>Meetings</b>	<b>Actions/Deliverables</b>
<i>Reference date (T0) – Signature of the contract</i>		Start date of the contract
<i>Ref. date + 15 days</i>	<i>Kick-off meeting with EASME and the European Commission (EC)</i>	<i>Kick-off meeting minutes</i>
<i>Ref. date + 1 month</i>		<i>Inception report (with fine-tuned timetable and tasks)</i>
<i>Ref. date + 4 months</i>		<i>Deliverable 1 (conceptual definition of the digital building logbooks)</i>
<i>Ref. date + 6 months</i>	<i>Interim meeting with EC/EASME</i>	<i>Deliverable 2 (interim report) Submission of invoice for interim payment of 40%</i>
<i>Ref. date + 7 months</i>	<i>1<sup>st</sup> stakeholders meeting</i>	<i>Meeting reports</i>
<i>Ref. date + 9 months</i>		<i>Deliverable 3 (recommended EC actions)</i>
<i>Ref. date + 10 months</i>		<i>Draft final report</i>
<i>Ref. date + 11 months</i>	<i>Final meeting with EC 2<sup>nd</sup> stakeholders meeting</i>	<i>Meeting reports</i>
<i>Ref. date + 12 months</i>		<i>Final report Submission of invoice for final payment</i>

<b>2. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES</b>
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The contractor must deliver the report as indicated below.

**2.1. CONTENT****2.1.1. Final study report**

The final report must include:

- ✓ an abstract of no more than 200 words and an executive summary of maximum 6 pages, both in English, French and German;

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- ✓ specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- ✓ the following disclaimer:
- ✓ *"The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein."*

#### **2.1.2. Publishable executive summary**

The publishable executive summary must be provided in both in English, German and French and must include:

- ✓ specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- ✓ the following disclaimer:  
  
*"The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein."*

#### **2.1.3. Requirements for publication on Internet**

EASME is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. EASME supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility for information providers, see: [http://ec.europa.eu/ipg/standards/accessibility/index\\_en.htm](http://ec.europa.eu/ipg/standards/accessibility/index_en.htm)

For the publishable versions of the study, abstract and executive summary, the contractor must respect the W3C guidelines for accessible pdf documents as provided at: <http://www.w3.org/WAI/>.

#### **2.1.4. Graphic requirements**

The contractor must deliver the study and all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at:

[http://ec.europa.eu/dgs/communication/services/visual\\_identity/index\\_en.htm](http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm)

A simple Word template will be provided to the contractor after contract signature. The contractor must fill in the cover page in accordance with the instructions provided in the template. The use of templates for studies is exclusive to EASME contractors. No template will be provided to tenderers while preparing their tenders.

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### 3. INFORMATION ON TENDERING

#### 3.1. PARTICIPATION

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement.<sup>24</sup>

States covered by the Plurilateral Agreement on Government Procurement concluded within the World Trade Organisation are not included in this call for tenders as the Executive Agencies are not signatories of the Agreement.

In the case of a joint tender (see section 3.4), each member of the group must have access to this procurement procedure.



For British candidates or tenderers:

Please be aware that after the UK's withdrawal from the EU, the rules of access to EU procurement procedures of economic operators established in third countries will apply to candidates or tenderers from the UK depending on the outcome of the negotiations. In case such access is not provided by legal provisions in force candidates or tenderers from the UK could be rejected from the procurement procedure.

#### 3.2. CONTRACTUAL CONDITIONS

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

#### 3.3. COMPLIANCE WITH APPLICABLE LAW

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU<sup>25</sup>.

Information about the environmental policy of EASME is provided in Annex 9 to these specifications.

<sup>24</sup> Third countries with a special agreement in the field of public procurement that have been given access to procurement procedures of the Union institutions, agencies and bodies regardless of the value of the purchase are: Albania, Bosnia and Herzegovina, Former Yugoslav Republic of Macedonia, Iceland, Montenegro, Norway and Liechtenstein and Serbia.

<sup>25</sup> Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

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### **3.4. JOINT TENDERS**

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact ("the leader") for the Contracting Authority for administrative and financial aspects as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

### **3.5. SUB-CONTRACTING**

Subcontracting is the situation where a contract has been or is to be established between the contracting authority and a contractor/tenderer only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The contracting authority has no direct legal commitment with the subcontractor(s). In practice, any third party involved in the contract implementation which has no legal link with the contracting authority but with the contractor will be considered as subcontractor (e.g. any other company which does not participate in the contract execution but provides financial capacity).

Subcontracting is permitted but the contractor will retain full liability towards the contracting authority for performance of the contract as a whole.

The rules of access to EU public procurement (Section 3.1) do not apply to subcontractors.

Tenderers are required to identify all subcontractors whose capacity is necessary to fulfil the selection criteria.

During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the Contracting Authority.

### **3.6. COSTS**

Tenderers themselves will bear the costs of drawing up their tenders and EASME will not be liable to pay any compensation if a tender is rejected or if it decides not to select any tender.

### **3.7. CONTENT OF THE TENDER**

The tenders must be presented as follows:

- Part A: Identification of the tenderer (see Section 3.8)
- Part B: Non-exclusion (see Section 4.2)
- Part C: Selection (see Section 4.3)
- Part D: Technical offer (including Annex 6– Technical tender form)

The technical offer must be limited to 50 pages, excluding supporting annexes.

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The technical offer must cover all aspects and tasks required in the tender specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all minimum requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

For the appraisal, the written submission shall include a clear and detailed description of the organisation, human and technical resources and methodology proposed. The tenderers will provide a practical and detailed description of the human and technical resources and services proposed to achieve the objectives and results set out in Sections 1.3, 1.4, 1.6 and 1.7 above.

#### ➤ Part E: Financial offer (Annex 7 - Price and breakdown of prices)

The financial offer must be presented in a form of Annex 7 duly filled in, dated and signed.

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

#### ➤ The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

### **3.8. IDENTIFICATION OF THE TENDERER**

The tender must include a cover letter (letter of submission of tender - Annex 2) presenting the name of the tenderer (including all entities in case of joint offer) and identified subcontractors if applicable, and the name of the single point of contact (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney (Annex 4). The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent (Annex 5) signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC<sup>26</sup>. This information is used for statistical purposes only.

In the course of this tender procedure the EU Validation Services may contact tenderers via the Participant Register and ask for supporting documents with respect to the legal existence and status. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation

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<sup>26</sup> OJ L 124/36, 20.5.2003

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Services. Such complementary documents may be asked so as to complete the checks on the compliance of successful entities with the selection criteria and/or to ensure that the entity is not in one of the exclusion situations referred to in this call for tenders.

## **4. EVALUATION AND AWARD**

### **4.1. EVALUATION STEPS**

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- ✓ Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- ✓ Selection of tenderers on the basis of selection criteria
- ✓ Verification of compliance with the minimum requirements set out in these tender specifications
- ✓ Evaluation of tenders on the basis of the award criteria

The contracting authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

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

### **4.2. VERIFICATION OF NON-EXCLUSION**

All tenderers must provide a declaration on honour (Annex 3), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, all subcontractors whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The contracting authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided

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in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

#### **4.3. SELECTION CRITERIA**

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

##### **4.3.1. Declaration and evidence**

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 3), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see Section 4.2) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the declarations on honour (Annex 3) and the information included in the tables in Annex 2.1 and Annex 2.2, fully completed, and the evidence, where requested.

After contract award, the successful tenderer will be required to provide the necessary evidence before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

##### **4.3.2. Legal and regulatory capacity**

This section is not applicable to this call for tenders.

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### 4.3.3. Economic and financial capacity criteria

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove its capacity, the tenderer must comply with the following criterion:

Its average annual turnover for the last two years for which the accounts have been closed<sup>27</sup> shall amount to at least one and a half times the volume of the market as specified in point II.1.5 of the contract notice. This criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender and subcontractors whose capacity is necessary to fulfil this criterion.

To this effect, the following should be provided with the tender in eSubmission from all tenderers and subcontractors whose capacity is necessary to fulfil the combined capacity:

- ✓ Statement of Turnover in accordance with Annex 2.1 of these tender specifications completed with the information requested.

For tenderers (including all members of the group) expect subcontractors:

In the course of this tender procedure the EU Validation Services may contact tenderers via the Participant Register and ask for supporting documents with respect to their economic and financial capacity. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation Services. Such complementary documents may be asked so as to complete the checks on the compliance of successful entities with the selection criteria.

For subcontractors:

**Subcontractors contributing to the combined financial and economic capacity of tenderers should submit with the tender the following documents in eSubmission:**

- ✓ Copy of the Profit and Loss accounts for the last two years for which the accounts have been closed from each concerned legal entity;

Failing that,

- ✓ Appropriate statements from banks;

or

- ✓ Evidence of professional risk indemnity insurance.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its

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<sup>27</sup> In the case of joint tender or identified sub-contractors, the turnover must be provided for the same two years for all the partners/subcontractors.

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justification. The Contracting Authority reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

#### 4.3.4. Technical and professional capacity criteria and evidence

Tenders must provide in their tender the table in Annex 2.2 of these tender specifications, exhaustively completed with all the necessary information.

The evidence mentioned below must be provided only on request, except for evidences B1, B2 and B3 (CV) that should be part of the submitted offer.

##### A. Criteria relating to tenderers:

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below.

The project references indicated below consist in a list of relevant services provided in the past years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients, where possible.

Criteria	Evidence
✓ <b>Criterion A1:</b> The tenderer must prove knowledge and experience in the EU construction sector, in particular, in property and asset management issues, and buildings' performance assessment.	✓ <b>Evidence A1:</b> The tenderer must provide references for three completed projects delivered in the field of either, property and asset management issues, or buildings' performance assessment, in the last four years.
✓ <b>Criterion A2:</b> The tender must prove experience in online survey techniques, desk reviews, interviews with experts in the various segments of the construction value chain, , data collection, data and statistical analyses, identifying and documenting best practices, policy analysis, drafting technical reports and policy recommendations.	✓ <b>Evidence A2:</b> The tenderer must provide references for two studies and/or projects delivered in the last five years, demonstrating experience in all the fields mentioned.
✓ <b>Criterion A3:</b> The tenderer must prove capacity in digital data management.	✓ <b>Evidence A3:</b> The tenderer must provide references for one project delivered in the last five years demonstrating that experience.
✓ <b>Criterion A4:</b> The tenderer must prove capacity to work in all EU official languages and to draft reports in English.	✓ <b>Evidence A4:</b> The tenderer must provide references of previous research work undertaken in the last five years in collaboration with local partners established in at least 10 EU Member States  The tenderer must provide one document of at least 10 pages (report, study, etc.) in English that it has drafted and published or delivered

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	to a client in the last two years.
✓ <b>Criterion A5:</b> The tenderer must prove its capacity to organise meetings and events in EU countries.	✓ <b>Evidence A5:</b> The tenderer must provide references for two events organised in EU countries in the last five years.

Any tenderer with a professional conflict of interest will be rejected on the basis of not fulfilling selection criteria for professional capacity.

**B. Criteria relating to the team delivering the service:**

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

In addition to the minimum profiles, a tenderer may add other profiles to the team. It should also explain the role and the involvement concerning the task requested by this call for tenders.

Evidence will consist in CVs of the team responsible to deliver the service. Each CV should indicate the intended function in the delivery of the service.

<b>Criteria relating to the team delivering the service</b>	<b>Evidence</b>
✓ <b>Criterion B1 - Project Manager:</b> At least 5 years’ experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size (at least € 260.000) and coverage (at least 3 countries covered), with experience in management of a team of at least 5 people.	✓ <b>Evidence B1 – CV</b>
✓ <b>Criterion B2 - Language quality check:</b> at least 3 members of the team must have at least C1 level in the Common European Framework for Reference for Languages <sup>28</sup> in English.	✓ <b>Evidence B2 - A language certificate or past relevant experience, or mother tongue</b>
✓ <b>Criterion B3 – Expertise:</b>  At least 2 experts of the team must have at least 3 years of professional experience in the field of property and asset management, including in buildings' performance assessment.  At least 2 experts of the team must have at least 3 years of professional experience in digital data management.  At least one expert must have knowledge of online survey techniques, desk reviews, interviews, data	✓ <b>Evidence B3 – CV</b>

<sup>28</sup> See [http://www.coe.int/t/dg4/linguistic/Cadre1\\_en.asp](http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp)

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collection and information analyses from 15 EU countries.	
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The detailed curriculum vitae (in EUROPASS format<sup>29</sup>) covering relevant educational and professional qualifications should be up to two A4 pages for each of the team members and must specify:

- The different diplomas obtained (copies of which may be requested by EASME where appropriate);
- Level of languages spoken;
- Expertise and experience relevant to the subject matter of these tender specifications;

The contractor shall ensure that the staff members listed in the technical proposal are effectively available and assigned to the project when it begins.

### 4.4. AWARD CRITERIA

The contract will be awarded based on the most economically advantageous tender, according to the 'best price-quality ratio' award method. The quality of the tender will be evaluated based on the following criteria. The maximum total quality score is 100 points.

Tenders that receive less than 65% of the maximum possible mark for the whole quality evaluation or less than 50% for any of the quality criteria will be eliminated and their final score will not be calculated. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

Criteria	Points
<p>✓ <i>Quality of the proposed methodology</i></p> <p>This criterion will evaluate:</p> <ul style="list-style-type: none"><li>- If the proposed approach to the implementation of the tasks is appropriate and innovative;</li><li>- If the methodology covers all the tasks listed in the specifications.</li></ul>	40 points
<p>✓ <i>Organisation of the work and resources</i></p> <p>Quality, appropriateness and completeness of the organisation of the proposed activities and of the work plan (technical relevance, detailed tasks description, including a clear timetable and justification of the distribution of roles, efforts and resources allocated), plausibility and global coherence of the bid.</p> <p>This criterion will evaluate, inter alia:</p> <ul style="list-style-type: none"><li>- If the tasks are well described, coherent and consistent, and if the description of the work plan is sufficiently</li></ul>	50 points

<sup>29</sup> See: <https://europass.cedefop.europa.eu/en/home>

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<p>detailed;</p> <ul style="list-style-type: none"> <li>- If the proposed activities are supported by clear and rational justifications;</li> <li>- If the quality and clarity of the information provided is sufficient regarding: <ul style="list-style-type: none"> <li>- Identification of sources of information,</li> <li>- Information and data collection and assessment,</li> <li>- Preparation, organisation and exploitation of surveys and interviews,</li> <li>- Analysis and presentation of detailed findings,</li> <li>- Formulation of relevant conclusions, recommendations and outputs,</li> </ul> </li> <li>- Appropriateness of the composition of the proposed team and of the allocation of the work.</li> </ul>	
<p>✓ <i>Quality control measures and Risk plan</i></p> <p>This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system should be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.</p> <p>It will also assess the risk identification and assessment, and mitigations measures proposed.</p>	<p>10 points</p>

**4.5. RANKING OF TENDERS**

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below. A weight of 70/30 is given to quality and price.

<p>score for tender X</p>	<p>=</p>	$\frac{\text{cheapest price}}{\text{price of tender X}}$	<p>*</p>	<p>100</p>	<p>*</p>	<p>price weighting (30 %)</p>	<p>+</p>	<p>total quality score (out of 100) for all award criteria of tender X</p>	<p>*</p>	<p>quality criteria weighting (70 %)</p>
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The tender ranked first after applying the formula will be awarded the contract.

**4.6. INFORMATION TO TENDERERS ON THE FINAL EVALUATION**

EASME will inform tenderers of decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

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EASME will inform all rejected tenderers of the reasons for their rejection and all tenderers submitting an admissible tender of the characteristics and relative advantages of the selected tender and the name of the successful tenderer.

However, certain information may be withheld where its release would impede law enforcement or otherwise be contrary to the public interest, or would prejudice the legitimate commercial interests of economic operators, public or private, or might prejudice fair competition between them.

<b>5. ANNEXES</b>
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The following documents are annexed to these specifications and form an integral part of them:

Annex 1: Draft contract (for information)

Annex 2: Letter of submission of tender (to be filled in and signed by the tenderer)

- Annex 2.1: Statement of turnover
- Annex 2.2: Technical capacity

Annex 3: Declaration on honour (exclusion and selection criteria)

Annex 4: Power of attorney

Annex 5: Letter of intent for sub-contractors

Annex 6: Technical tender form

Annex 7: Financial offer (price and breakdown of costs)

Annex 8: Checklist for Submission

Annex 9: EASME's Environmental Policy