

SHERPA

**Shared Knowledge for Energy Renovation in buildings
by Public Administration**

CALL FOR TENDERS

**PROCEDURE FOR THE CONTRACTING OF TECHNICAL
ASSISTANCE FOR THE ELABORATION OF THE INTERREG MED
SHERPA PROJECT'S JOINT ACTION PLAN:**

***'Implementing energy efficiency and renewable energy in
Mediterranean Buildings'***

WP5 – 5.5.2

Technical assistance to support the elaboration of SHERPA's Joint Action Plan retaking the project's methodology, outcomes (including the 100 regional buildings and the 100 municipal ones) and tools.



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SUMMARY OF THE NEEDED SERVICE

An experienced entity specialised in Energy Efficiency in Public Buildings is needed to assist the SHERPA project with the elaboration of its Joint Action Plan: *“Implementing energy efficiency and renewable energy in Mediterranean Buildings”*.

The profile of the applicants must comply with the following criteria:

- ✓ Expertise in and thorough experience related to energy efficiency in buildings
- ✓ Expertise in digital platforms design
- ✓ Knowledge of the characteristics of Mediterranean areas' buildings
- ✓ Experience in drafting similar documents

The main tasks to be performed are:

- Determining the implementation budget of the JAP
- Parallel activities:
 - Meetings with the contractors
 - Participation in some of the Capitalisation Regional Workshops
 - Analysis of SHERPA's Toolkit guide and Set of toolkits
 - Taking part in SHERPA meetings and exchanging with the partners in charge of the elaboration of the JAP whenever needed

The contract shall enter into force once it has been signed (**towards the beginning of 2019, in January/February**) and **will last until 31 October 2019**.

I. BACKGROUND INFORMATION

The Conference of Peripheral Maritime Regions of Europe (CPMR – www.crpm.org) and its Intermediterranean Commission (IMC) are participating in the Interreg MED Modular Project [SHERPA](#), funded by Interreg MED Programme. SHERPA fits in the Interreg MED Priority Axis 2: “Fostering low carbon strategies and energy efficiency in specific MED territories: cities, islands and remote areas”; specifically contributing to the Specific Objective 2.1 of the programme: “To increase capacity for better management of energy in public buildings at transnational level”. The Interreg MED programme is a transnational European Cooperation Programme for the Mediterranean area. It is co-financed by the ERDF (European Regional Development Fund), an instrument of the EU regional policy and of its new programming period.

- **Origin of the project**

Several past EU projects, in particular strategic MED projects such as MARIE, ELIH-Med and PROFORBIOMED, among others, have highlighted the specific conditions and difficulties related to projects in Energy Efficiency in Buildings (EEB) within the MED area.

Concretely, the Policy Paper “Responding to challenges regarding energy efficiency and renewable energy in Mediterranean buildings” (2014), developed by AviTeM-France and SHERPA’s lead partner within the context of the three abovementioned MED projects, detected, as a consequence of geographical, climatic, social and economic specificities, a huge potential of energy saving.

The four main problems identified in the MED area with regards to the project implementation are: financing, internal structure of the public Administrations, training of the public workers and data collection systems.

These four barriers served to structure the testing work developed in the SHERPA project.

- **Specific objective of the project**

The project’s overall objective is to reinforce the capacities of public administrations at regional and sub-regional level within the territories covered by SHERPA so as to improve energy efficiency in their public buildings’ stock, address difficulties related to EEB (Energy Efficiency in Buildings) projects in the Mediterranean area and speed up the implementation of Directives 2010/31/EU (Energy Performance of Buildings) and 2012/27/EU (Energy Efficiency). To do so, a transnational, holistic and peer-to-peer model has been developed to work on the main barriers related to EEB strategies in public buildings, namely: governance structures; information gathering and usage; awareness and training of responsible staff; and financing of actions. This methodology is being applied to 100 pre-identified regional public buildings from partner regions (testing phase). Another 100 renovation projects following this methodology are to be carried out in buildings from partner regions’ municipalities during the capitalising phase.

For further information:

- [SHERPA’s specific brochure](#)
- [SHERPA partners](#)
- [SHERPA’s working groups](#)
- [SHERPA’s main deliverables](#)

II. SCOPE OF THIS WORK

The selected applicant will be in charge of **supporting the CPMR with the elaboration of the project's Joint Action Plan**.

Under the SHERPA project's partnership agreement, the CPMR has taken responsibility for the elaboration of the project's **Joint Action Plan (JAP)**, included in the project's Work Package (WP) 5 on Capitalisation. The CPMR-IMC is responsible for the elaboration of the JAP, which aims to ensure the capitalisation of SHERPA's results, together with other EU, National, Regional & Local programmes and initiatives all over the MED area. The idea is to build on the link between the regional & the local level in EEB established in the frame of SHERPA's testing activities (WP3), spreading results over the MED area through policy recommendations, MoUs, agreements as well as implementation of EEB regional & local Policy Agreements (140) and projects in public buildings (100).

The JAP initiative is a **common framework for strategic actions aimed at the EEB in Mediterranean**, based on the strong policy framework created by three Interreg MED Programme (2007 – 2013) strategic projects (MARIE, ELIH-MED and PROFORBIOMED), and with an **important level of policy adhesion to two main policy documents they generated: The "[Ljubljana Declaration](#)" and the [Policy Paper "Responding to challenges regarding energy efficiency and renewable energy in Mediterranean buildings"](#)**.

In this sense, the SHERPA JAP will not be an isolated action, as it will directly link to the supported and joint initiatives born in the framework of the Interreg MED Programme, with an operational focus to generate a funding process for the ERB projects created directly by SHERPA, and also the other ERB strategies, policies and projects generated through regional and national long-term strategies, in accordance to the new EU Directive 2018/844.

The **main actors** involved in the elaboration of the JAP are:

- **Government of Catalonia:** Lead partner
- **CPMR-IMC:** coordination of the JAP preparation; hiring of external expertise as support
- **CRES:** Coordinator of WP5 Capitalisation

The motivation is to achieve a considerable number of regional & local policy commitments, which at the local level consist at the same time of SEAPs implementation. Indeed, an important part of WP3 consisted in integrating the regional & the local level, which can be seen in all pilot actions: in PA1, the coordination between regional & local strategies; in PA2, the system integrating data at regional & local level; in PA3, specific trainings planned for public buildings' responsible persons at the local level; and in PA4, the scope of the financial tool being the regional & the local level.

Besides, Work Package 5 foresees the creation of an online Capitalisation Forum to maximise participants in several regional capitalisation workshops. It will produce jointly and consequently: Policy Recommendations, a MoU, a set of capitalisation toolkits in order for regions and municipalities to know about existing methodologies, and experiences and results on EEB in public buildings over the EU/MED. Finally, all EEB projects developed in SHERPA (100 buildings for WP Testing and 100 for WP Capitalising) will be integrated into the Joint Action Plan, to be approved in a Final Agreement with the endorsement of the IMC-CPMR Assembly at the very end of the project and shared with the municipalities involved in the capitalisation phase of SHERPA and with any other local authority interested in EEB in Public Building.

The capitalisation set of toolkits and the JAP will be available after the project and their durability will be ensured thanks to the IMC-CPMR Task Force on Energy Efficiency.

III. EXTENT

The overall task consists in (but not limited to) **determining the implementation budget of the JAP**.

The successful bidder will have to prepare the implementation budget of the JAP, by extrapolating the cost of the strategic measures defined by the regional roadmaps to the buildings in the Mediterranean area, as well as the budget corresponding to the integration of the specific SHERPA projects defined, both described above. Also, once the total cost of implementation of the JAP has been defined, and starting from the individual financial analysis of each specific ERB project included, the SHERPA's financial analysis tool should be applied to the JAP as a whole, and include in the document the results obtained, therefore defining the financial strategy requested to execute the JAP. The successful bidder shall also design the budget for the creation and maintenance of a digital platform integrating the tools developed by the 4 pilot activities.

This will have to be based on the SOTA analysis (taking into account the [Policy Paper "Responding to challenges regarding energy efficiency and renewable energy in Mediterranean buildings"](#), the [Ljubljana Declaration](#), both issued by the MARIE project, the MED ERB National and regional strategies, as well as the main conclusions of the MED and ENI projects that have worked on energy efficiency and renewable energies in buildings between 2011 and 2019, especially the Interreg MED [MEDNICE](#) project -Horizontal project on Efficient Buildings) and subsequent definition of the measures and strategic actions of the JAP that will be produced by the project.

IV. PARALLEL ACTIVITIES TO BE CARRIED OUT

- **Meetings with the contractors**

A representative of the CPMR-IMC and the successful applicant should meet on the following basis:

- First coordination meeting: first meeting, upon the contract assignment, in which all the works and calendars for each task will be revised.
- Monitoring meetings (at least once a month): in these meetings, the successful applicant will update and present a preliminary report of the execution of the requested tasks.
- Closing meeting: to review and approve the document.

- **Capitalisation Regional Workshops (deliverable 5.3.1)**

The *selected applicant* will take part in some of the Capitalisation Regional Workshops (*to be further defined after the signature of the contract*) so as to grasp the essence of the EEB Policy Recommendations (that are to be developed during these Workshops) and feed the JAP's implementation budget accordingly.

- **Analysis of the Toolkit guide (deliverable 5.4.1) and Set of toolkits (5.4.2)**

The Set of toolkits will include a collection of procedures, best practices, experiences and results collected from SHERPA and other related MED and EU projects within the field of intervention. The toolkits will be organised in 4 key thematic areas: policy, technical, financial, awareness.

The *selected applicant* will take this deliverable in consideration in the elaboration of the JAP's implementation budget.

- **Taking part in SHERPA meetings and exchanging with the partners in charge of the elaboration of the JAP (CPMR, GENCAT, CRES) whenever needed**

V. EXPECTED SCHEDULE

The contract with the expert/consultant is expected to start towards mid-January. A tentative schedule, which can be refined in the applicants' offers is the following:

End of January 2019:

- Participation in SHERPA's Spanish National Seminar in Valencia/First coordination meeting with the contractor and other SHERPA partners

Between February 2019 and May 2019:

- Desk analysis and information gathering phase
- Participation in SHERPA's Capitalisation Regional Workshops

Between May 2019 and July 2019:

- First draft (first draft of the JAP to be released during the same period)

Within October 2019:

- Final version

VI. SELECTION PROCESS

The tenderer must prove a conceptual, methodological and technical domain, adequate for the execution of the contract and reflect the technical capacity proven to serve in the development of the intended object and for the achievement of marked objectives.

The objective criterion of the technical proposal has a weight of 70% in the total evaluation according to the following objective evaluation criteria:

- Methodological approach (30%)
- Evaluation of the experience and CV of the candidate: especial emphasis on the understanding of the latest research and policy developments on energy efficiency in public buildings, and experience and capacity in drawing similar documents (40%)
- Economic offer (30%)

The final score will be the sum of the percentages resulting from the technical valuation and the economic valuation.

VII. CONTRACTUAL AND FINANCIAL TERMS

Administrative details of the Contracting Authority:

CPMR
6, rue Saint Martin
35700 Rennes – France
VAT: FR315305 483 61

The maximum amount available for this service is **€15,000 without VAT (€3000 of VAT to be directly paid to French taxation authorities by the CPMR).**

For this work the CPMR will be responsible for paying VAT in France, therefore, the fees to be charged by the consultant will be submitted net of VAT. The fees will be paid in three instalments on presentation of a duly-issued invoice:

- 30% after signature of the present agreement.
- 30% on submission of the draft JAP (or specific sections of it) in Spring 2019.
- 40% once the contract has been fulfilled by the end of October 2019.

The travel costs for the participation of the expert in the events relevant to the scope of this contract will be borne by the CPMR. The acceptance of the offer of the successful tender implies the acceptance of the conditions and schedules detailed in these ToRs.

The payment term for the invoice will be: bank transfer 30 days after the acceptance of the invoice (bank account details will be asked). The CPMR maintains the right to require additional fiscal documentation if considered needed. The tax legislation in force at the date of acceptance of the offer will be applied.

VIII. HOW TO APPLY

The offer must be sent in **one file on PDF format** to the following e-mail addresses: emmanuel.maniscalco@crpm.org and flora.leroy@crpm.org with the following subject: 'Consultancy offer for technical assistance – SHERPA project' by **23.59 of Friday 18 January 2019 at the latest**. The successful candidate will be notified on **Wednesday 23 January 2019**.

IX. REVIEW OF PROPOSALS AND AWARD CRITERIA

The IMC, as a contracting body, will proceed to examine the documentation provided to verify compliance with the technical and economic requirements of the bids, and may request from the tenderer any additional documentation required. The contracting authority shall exclude from the valuation and proposal of award the bids that do not comply with the requirements of the contract. Following the examination of the proposals, and after a detailed assessment of the selected offer, a team -which composition shall be determined internally- will formulate the corresponding final proposal of award, in accordance with the provisions of Annex I of this Bidding Document. In the event of observing omissions or deficiencies in the documentation provided, the applicable legislation for the correction of defects and omissions in documentation will apply. The presentation of the certifications accrediting the fulfilment of the tax and social security obligations by the tenderer will be mandatory.

X. AWARDING

The contracting authority shall award the contract to the most economically and technically advantageous proposal, with a maximum date of **1 February 2019** and shall communicate its decision on 23 January 2019. The award will be final and final.

XI. FORMALISATION OF THE CONTRACT

The contract must be formalised in writing within a period of ten working days, from the following to the notification of the award (**1 February 2019**).

XII. INTELLECTUAL PROPERTY

In the spirit of cooperation and exchange, the ownership of the work covered by the contract related to this ToR and co-funded by the Interreg MED Programme is open to the public and free of rights. The deliverables and results of the project should be accessible and available for free to the general public in a usable format. The Managing Authority/Joint Secretariat and any other relevant Programme stakeholder can use them for information and communication purposes. The authorship of the work covered by the contract related to this ToR is co-shared between the author and all the partners of the engaged projects.

XIII. CONFIDENTIALITY CLAUSE

Despite the public execution of the project, part of the information exchanged for the development of the purpose of this contract between the CPMR and the selected specialist, may be confidential. On this basis, only the documents and other pieces of information provided explicitly with the statement “confidential” will be dealt with as such. The selected expert ensures that respect its confidentiality and do not disseminate it, forward it to third parties or use it without prior written consent from the CPMR.