European Commission

Call for tenders GROW/2021/OP/0014

Technical study for the development and implementation of digital building logbooks

Open procedure

TENDER SPECIFICATIONS
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1 SCOPE AND DESCRIPTION OF THE PROCUREMENT

1.1 Contracting authority: who is the buyer?

This call for tenders is launched and managed by the European Commission, Directorate General for Internal Market, Industry, Entrepreneurship and SMEs, referred to as the Contracting authority for the purposes of this call for tenders.

1.2 Subject: what is this call for tenders about?

The subject of this call for tenders is a technical study for the development of European digital building logbooks.

Resulting from research, analysis and consultations, the technical study should deliver detailed technical guidelines to allow EU Member States (MS) to introduce and operationalise digital building logbooks under a common European Framework.

1.3 Description: what do we want to buy through this call for tenders?

The services that are the subject of this call for tenders, including any minimum requirements, are described in detail below.

Variants (alternatives to the model solution described in the tender specifications) are not allowed.

1.3.1 Background and objectives

In the Renovation Wave Communication\(^1\), the Circular Economy Action Plan\(^2\) and the EU Strategy on adaptation to climate change\(^3\) the Commission committed to introduce Digital Building Logbooks, which will serve as repositories for data on individual buildings and facilitate information sharing within the construction sector, and between building owners and tenants, financial institutions, and public authorities. Digital building logbooks will also be a gateway and a provider of building related data from and to the upcoming Building Renovation Passports\(^4\), Smart Readiness Indicators\(^5\), Level(s)\(^6\) and Energy Performance Certificates (EPCs)\(^7\) to ensure compatibility and integration of data throughout the lifecycle of buildings.

\(^1\) [https://ec.europa.eu/energy/sites/ener/files/eu_renovation_wave_strategy.pdf](https://ec.europa.eu/energy/sites/ener/files/eu_renovation_wave_strategy.pdf)


\(^3\) [https://ec.europa.eu/clima/policies/adaptation/what_en](https://ec.europa.eu/clima/policies/adaptation/what_en)


\(^5\) [https://smartreadinessindicator.eu/](https://smartreadinessindicator.eu/)

\(^6\) [https://ec.europa.eu/environment/levels/lets-meet-levels_en](https://ec.europa.eu/environment/levels/lets-meet-levels_en)

Figure 1. The role of the logbooks, graph from the final recommendations of the ’’Study on the Development of a European Union Framework for Buildings’ Digital Logbook’’

The current technical specifications refer to a technical study that will continue the work of the past and completed “Study on the Development of a European Union Framework for Buildings’ Digital Logbook” and specifically, its action recommendations 1 and 2. The past study also provided a definition for digital building logbooks that should be the base of any future work, and a mapping of relevant existing initiatives that should be studied, verified, updated and used to extract valuable lessons learnt for the execution of this contract.

The technical study will aim at the development of a semantic data model and a data management plan for digital building logbooks as well as of a standardised approach for data collection, data management and interoperability including its implementation framework.

The technical study will also develop guidelines for linking existing databases and propose solution for Member States in addressing challenges such as data collection, licences and sharing of data. It should also estimate the resources (time, budget, human etc.) needed in EU and MS level to set up and operationalise logbooks. Lastly the study will propose a visual identity and interface/platform for logbooks that can be customised in national level.

Digital building logbooks should develop in a way that they are of service to the achievement of EU goals (decarbonisation, climate neutrality, and digitalisation). As getaways to all building related data, they should be compatible with tools that contribute to the sustainability

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of the built environment (e.g., Level(s), whole life cycle impacts). They should consider and adapt with flexibility to the needs in the different EU Member States (proposing options and alternative scenarios that can be adapted to local realities), the construction ecosystem (contractors, architects, engineers, building owners etc.) and other stakeholders (building owners, facility managers, utility companies etc.) The contractor should develop an understanding, through consultations and research in past initiatives, of the interests, benefits and considerations of different stakeholder groups and Member States, to make suitable proposals that benefit the whole ecosystem.

Additionally, there have been important research initiatives in the last years, such as Horizon 2020 Coordination and Supporting Action DigiPLACE\textsuperscript{11} and other research projects funded by Horizon 2020 (e.g., X-tendo\textsuperscript{12}, iBROAD\textsuperscript{13}). These initiatives have brought together industrial stakeholders, academics and public authorities and delivered recommendations on areas such as data ownership or data ontologies that should be analysed and considered in this study. The tenderers are invited to include in their tenders the relevant projects they have identified and their proposals on how to build on them and why.

The European Commission is funding through Horizon Europe, Cluster 4 the 2022 topic "Demonstrate the use of Digital Logbook for buildings\textsuperscript{14}, innovation grants to experiment with logbooks and the utilisation of information available through them. The contractor should engage with projects funded under this call, and other relevant projects funded at EU or national levels.

In international level, the Global Alliance for Buildings and Construction supported by UN Environment, published guidelines describing the potential use of building passports\textsuperscript{15}.

This study should develop a European model for digital building logbooks that can be adopted in a voluntary basis across the EU Member States and potentially lead to a Commission Recommendation and, eventually formal standardisation requests.

The following principles should guide the execution of the study:

A. Digital building logbooks should support the digitalisation of the construction ecosystem and the competitiveness of the European construction Industry. They should be based on and foster transparency in the decision making of public authorities, trust among stakeholders and informed decision making for individuals, professionals, and authorities. They should contribute accomplishing objectives such as the digitalisation of administration (building permits, authorisation, renovations, change of ownership, demolition etc.) and exist in cooperation with initiatives aiming at

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\textsuperscript{11} Home (digiplaceproject.eu)

\textsuperscript{12} X-tendo Toolbox

\textsuperscript{13} iBROAD Project – Individual Building Renovation Roadmaps (iroad-project.eu)

\textsuperscript{14} https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-cl4-2022-twin-transition-01-09

\textsuperscript{15} Building passports and logbook in the context of these guidelines can be considered as synonyms https://globalabc.org/index.php/news/new-report-building-passport-practical-guidelines
the digitalisation of building permits and procurement (for example with the use of Building Information Modelling), and of digital transformation of construction SMEs (e.g., through Digital Innovation Hubs, digital platforms, and data spaces). Digital building logbooks should follow the principles of technology-neutrality and allows for the establishment of practical and user-friendly data, tools, applications, and services.

B. Digital Building Logbooks should exist in cooperation with EU-wide tools and initiatives dealing with buildings and construction. Notably and not exhaustively, the work performed should be guided by the principle that digital building logbooks are a facilitator for:

- The potential development of a European Construction Data Space\(^\text{16}\).
- Exchange of data among tools. Digital Building logbooks should be able to extract and provide data and assessments from and to Energy Performance Certificates (EPCs)\(^\text{17}\), Level(s)\(^\text{18}\), Smart Readiness Indicators (SRI)\(^\text{19}\), renovation passports/roadmaps etc. Combining the data of product passports with digital building logbooks will for instance support extending the service-life of buildings and give better insights in end-of-life possibilities, thus enabling buildings to be reused and refurbished in an optimal way. The revision of the Construction Products Regulation\(^\text{20}\) and the development of the Sustainable Product passport initiative should be considered.
- Climate mitigation and adaptation\(^\text{21}\) in the built environment. Notably the data in the logbooks should be able to serve the calculation of the carbon footprint and the climate resilience certification\(^\text{22}\).
- Make information about safety (e.g., fire safety, earthquake safety and past performance), presence of asbestos\(^\text{23}\) and (physical) accessibility visible and mainstream its use. Additionally, the proposal of the contractor should include how digital building logbooks as tools should be developed in order to comply with (digital) accessibility principles\(^\text{24}\).
- Compatibility with relevant international and European standards related to (the digitalisation of) the construction sector such as Building Information

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\(^{17}\) Energy Certificates and inspections https://ec.europa.eu/environment/levels_en

\(^{18}\) Level(s) https://ec.europa.eu/environment/levels_en

\(^{19}\) Smart Readiness Indicator for Buildings https://smartreadinessindicator.eu/


\(^{21}\) EU Adaptation Strategy https://ec.europa.eu/clima/policies/adaptation/what_en

\(^{22}\) EU strategy on adaptation to climate change COM(2021)82 and Commission technical guidance on climate proofing of infrastructure 2021-2027, Commission Notice C(2021)5430 of 29.7.2021 “Buildings are also considered as infrastructure in the guidance.”

\(^{23}\) Already available or to be made available by the development of future tools.

Modelling (BIM), Energy Performance of Buildings (EPB), Sustainability of construction works etc.

- Compliance with the requirements for EU regulation 2016/679 on the protection of natural persons regarding the processing of personal data and on the free movement of such data (GDPR).

The proposed European digital building logbook could also build further on and refer to initiatives such as ISO 19650 ‘Organisation and digitisation of information about buildings and civil engineering works’, International Construction Measurement Standards, GDPR regulation, Green Building XML, IFC data models etc. Various standardisation organisations are working on topics related to the digitalisation of the construction sector, and the contacts should propose how the linkage of logbooks with BIM models can operationalise. Formal international standardisation for building information modelling (BIM) is organised by ISO (e.g., ISO TC59 / SC13 ‘Organization and digitization of information on buildings and civil engineering, including BIM’ and TC184: ‘automation systems and integration’) and at European level by CEN (e.g., TC442). In addition to formal standardisation, there are also informal standardisation initiatives in this field such as the building SMART international initiative that developed the Industry Foundation Classes (IFC) as a neutral and open specification for the BIM data model which they maintain, or the Open Geospatial Consortium (OGC) for GIS standards. GIS standards are open standards for the global geospatial community including the built environment.

A wider uptake of the digital building logbook requires a systematic and aligned capture of information, data gathering, processing, exchange, and storage. This entails, among others, all building-related data, of both static and dynamic nature, and can include administrative documents, plans, description of the land, the building and its surroundings, technical systems, traceability and characteristics of construction materials, buildings performance data, and links to building ratings and certificates. The technical study should deliver general recommendations on the enabling framework for the operationalisation of logbooks.

An EU-wide harmonised set of logbook data protocols would enable interoperability and inclusion of external databases, while offering an approach to bring together fragmented and scattered data across several. The standardised digital building logbook should be a safe instrument, giving users control of their data and allowing access to third parties while respecting the fundamental right to protection of personal data. It would also help Member States to develop and adopt legislation and initiatives, fostering not only the uptake (or further development) of the digital building logbook but also the digitalisation of the construction ecosystem and its operations.

1.3.2 Detailed characteristics of the purchase

The contractor to carry out the execution of this study should propose a model for implementing digital building logbooks in a harmonious and interoperable way across the EU27.

This technical study should offer to EU and national policy makers all the necessary information and a proposed framework to set up the necessary infrastructure and operationalise digital building logbooks under a common EU model. The proposed digital building logbooks must be of benefit to the market, to industrial stakeholders and innovators, for the development of new and better services and innovative products.
1.3.2.1 A semantic data model for European digital building logbooks

One of the main purposes of this technical study is to establish a semantic data model and a data management plan for digital building logbooks (including necessary data sets and functionalities). The model should comprise a standardised dictionary of all building-related terms that may be used in a digital building logbook, define them, and explain their function within the logbook.

The semantic data model to be proposed is meant to be used by public authorities for the development and implementation of digital building logbooks. The contractor may use as inspiration non-construction related EU-level tools that apply multi-stakeholder data management and deal with challenges that are like the ones for the logbook.

1.3.2.2 The logbook as a gateway: linking existing databases

EU and national level databases should be equally analysed, together with the legal ownership of the different datasets. Different functionalities should be explored and proposed, when appropriate according to local contexts. The study should explore where data is already available (e.g., in BIM models, permits or energy certificate) and propose ways of extracting and using them (connection of/with existing databases) without re-creating them if not necessary.

The contractor should define precisely the essential elements needed to enable interoperability with existing databases, integration of functionalities and data exchange between different users, while at the same time ensuring legal compliance. The technical study should explore and make available core EU-level data fields, as well as country-specific platforms and requirements.

The digital building logbook, as described in the Renovation Wave strategy and the previous study, relies on connections that enable data exchange between several data repositories/databases. Many building information databases exist across the EU: the purpose of the digital building logbook is to bring these data sources together and become a common gateway to access all building related data.

Linking many existing databases – such as public registries (e.g., cadastre, administration, urban planning, cultural heritage), EPC databases, utilities providers and consumption data bases, as well as databases related to the smart readiness indicator, building renovation passports and the Level(s) framework – is thus vital for the success of digital building logbook development and its implementation. Incorporating trustworthy data sources will

25 Functionalities have a broad sense: from absolutely essential functionalities, such as ways of entering data, to attractiveness of the tool, such as inform users about updates, a record of information consulted and by whom, options for users to question data points, etc.

26 The European standard on electronic invoicing (EN 16931-1:2017) establishes a semantic data model of the core elements of an electronic invoice. The semantic model includes only the essential information elements that an electronic invoice needs to ensure legal and fiscal compliance and to enable interoperability for cross-border, cross-sector and domestic trade. The semantic model may be used by organisations in the private and the public sector for public procurement invoicing.

increase the chances for a successful implementation. Connecting all these data sources and users requires common ‘languages’ – interfaces and protocols – to enable interoperability, data consistency and information exchange.

Linking multiple databases requires the existence of identifiers or ‘primary keys’ in each of the databases so the information of interest from multiple sources can be selected in one query. In addition, an intuitive user-friendly structure for the gateway interface is needed.

An EU-wide application programming interface (API) could communicate with digital building logbook databases, which would create a new common EU market, enabling software vendors to integrate connections with digital building logbook databases in a uniform approach for all Member States. Use case examples are BIM / GIS software automatically retrieving relevant geometric information from the digital building logbook in a secure way, or DSOs having information on electric vehicle charging points in a specific city district (cf. revised EPBD Art. 8 provision on recharging points). The use of data coming from various sources might require establishing the use of unique building identifiers to link data coming from different sources to one building, or the use of primary keys. The variety of existing data infrastructures and linkage options require that the contractor identifies and lists the benefits and risks of the different linking schemes. It is important to consider that one linking scheme could be only suitable under some specific circumstances (e.g., typology of data, storage structure or Member State legislation). The digital building logbook acts as a gateway to facilitate the exchange of building-related information. The linkage of the databases can be achieved by storing directly relevant data or by creating a bridge to access it (Figure 1). The contractor should also propose the digital building logbook online interface/platform and if necessary, the method of storage of information not already accessible through other data bases.

1.3.2.3 Addressing data sharing, intellectual property and licences

The sharing of information among a large and diverse pool of stakeholders unavoidably raises questions on intellectual property rights regarding the work of, for example, the energy expert or other building professionals and service providers. The creation of unnecessary barriers should be avoided, and while respecting data ownership, the contractors should propose ways to facilitate data sharing, for example through a model for database and licensing rights.

The technical study should develop guidelines on how this can be achieved. The legal framework regulating the processing of personal data is already in place, but the specifications for the content and technical structure still need to be developed. As mentioned above a model/form for licencing rights should be developed and proposed.

The digital linkage of databases within the digital building logbook is expected, to improve accessibility to building/construction data. The opportunities to access the data are currently not the same for all stakeholders, especially for SMEs. Promoting anonymised data-sharing and facilitating access to it can help generate new business opportunities, improve the efficiency of existing services, and accelerate the green transition of the construction ecosystem. The existence of open common linked data sources can contribute positively to the integration and exchange of data, eventually improving its relevance and fostering innovation.

For the logbooks and the data available through them to be useful, the data need to be verifiable and reliable. As information and data grow exponentially, the identification and validation of quality data are becoming more complicated. Common databases whose
trustworthiness is ensured by official certification mechanisms contribute to improving the impact of its use.

Among other subjects, this study should cover an overview of existing databases, the trustworthiness of available data sources, and analysis of how the various databases can become more reliable and better aligned with the digital building logbook, as well as how to enable interoperability, data consistency and information exchange. As mentioned above, Application Programming Interfaces (APIs), are one of the main vehicles of modern digital architectures, enabling many opportunities and can be applied for digital building logbooks. Internal linkage processes within the gateway should also respond to challenges such as data verification, hierarchisation of the main linkable keys, deduplication to decrease computational time, or compression to facilitate the exchange. The technical study should also specify aspects such as the digital building logbook functionalities offered at this level or the mechanisms to regulate the accessibility of the database. To achieve the spread of an EU-wide tool, that the presence of intermediate processing layers or translation layers is essential to allow interoperability between the different databases.

The guidelines should also include a forecast of how new databases with linking potential for the digital building logbook will evolve. New opportunities and emerging technologies and tools allowing collecting data (e.g., sensors) open new possibilities and responsibilities in terms of data privacy and security.

1.3.2.4 Implementation of logbooks

The final and principal deliverable of the technical study is a technical, detailed, and realistic plan to set up and operationalise digital building logbooks under a common EU framework and on a voluntary basis. This should be done by the development of detailed guidelines to the Member States.

Together with the abovementioned (semantic data model, linking of databases, interface etc.) the contractor will have to present the benefits of logbooks for the direct and indirect users and beneficiaries (from owners, authorities and financial institutions to construction professionals and utilities companies) that as the previous study found are valuable for policy makers. The contractor should also make reasoned proposals on the enforcement of logbooks (type of buildings to require a logbook first, step in their lifecycle that triggers implementation etc.), considering successful and unsuccessful case studies, as well as principal bottlenecks in national conditions. The contractor should also propose a framework for the input and update of logbooks and their data (when, in what occasion in the building’s lifecycle and by whom) and their verification.

The contractor should estimate the needed resources (budget, human, technical infrastructure, and others) to operationalise digital building logbooks in EU level and per Member State. To provide this, they should consider the current lack of centralised storage, the feasibility of relying mostly to existing databases and the potential development of a construction data space in EU level.

For the whole duration of the study, the contractor should identify risks in the implementation of digital building logbooks, (such as malware or leakage of sensitive information, regulatory barriers, or stakeholder opposition) and propose a plan of mitigating such risks.
### 1.3.2.5 Stakeholder involvement

The contractor will have to involve national (and when needed regional) public authorities and other stakeholders (industrial, financial, building owners and managers) while carrying out the study, to provide insights and assure consensus and validation of the deliverables.

The contractor will have to compile a list of stakeholders that will be agreed with the Commission and establish contacts with them. The tenderers should propose a comprehensive plan of stakeholder engagement that will feed into the development of the technical study and will allow the stakeholder participation and validation of its proposals.

The tender should include the targets that the tenderer commits to (number of events, number of participants for the events, reach of dissemination activities, and number of responders). A comprehensive timeline linking the consultations and awareness raising with different stakeholder should be submitted in the tender.

### 1.3.2.6 Organisation of work and communication with the contracting authority

The tenderers should propose a comprehensive plan of how, when and by whom the tasks and subtasks described will be executed. The plan should include the proposed sequence of the different tasks and the research and stakeholder engagement steps needed. Lastly, the tenderers should propose their plan for communication with the contracting authority to approve timely and validate the different tasks conducted. The approach of the contractor in executing any task should be discussed in advance with the contracting authority and approved when completed.

### 1.4 Deliverables, meetings and communication

#### 1.4.1.1 Meetings with the Commission

**Kick-off meeting:** The Contractor will be required to attend a kick-off meeting at Commission premises or by videoconference no later than the 2nd week following the start of the contract, with the participation of minimum four representatives of the project team. The aim of this meeting will be to discuss the proposed approach of carrying out the study and receive feedback and validation from the contracting authority.

**Interim meeting:** The Contractor will be required to attend a progress meeting at Commission premises or by videoconference in Month 10 following the start of the contract, with the participation of minimum four representatives of the project team. The aim of this meeting will be to discuss the progress of the study (see point 1.3.3.2 - interim report) and plan future tasks.

**Final Meeting:** The Contractor will be required to attend a final meeting at Commission premises or by videoconference in Month 18 following the start of the contract, with the participation of minimum four representatives of the project team. The aim of this meeting will be to present the final deliverables of the study.

The tenderers should provide in their bids a comprehensive plan on complementary meetings and videoconferences with the Commission (e.g., bi-weekly progress calls, meetings linked to study deliverables and milestones) to assure the timely preparation, revision and delivery of the different tasks.
1.4.1.2 Deliverables

A work plan and the minutes of the meeting to be delivered within 5 working days after the kick-off meeting.

A progress report (max 20 pages) to be delivered 6 months after the signature of the contract. This report will describe the tasks accomplished so far, any problems encountered and will have to justify possible delays in the established schedule.

A short interim report (max 30 pages) to be delivered 9 months after the signature of the contract. This report should present the completed deliverables, main challenges and lessons learnt and working plan for the future deliverables. This report will be discussed during the interim meeting (see point 1.3.3.1).

As described in the section above, the contractor will have to deliver within the first 14 months of the contract the following:

- A standardised dictionary of all building-related terms to be used in a digital building logbook, define them, and explain their function within the logbook.
- A proposal on the datasets to be included.
- Analysis of existing databases, including collection of information of their ownership and ownership of the data.
- Proposed functionalities of the digital building logbook.
- Elaboration of the essential elements, needs, interfaces, processing layers and protocols that can enable interoperability of the logbook with existing databases.
- Technical proposal on the connection of the logbook with existing databases (e.g., use of primary keys, APIs, unique identifiers, building ID etc.).
- Proposal (through schemes, diagrams and mock-ups) on the development of the gateway interface for the logbooks including potential storage/hosting needs, a common European visual identity (with possibility of translation).
- Describe the processes for the input and update of data (when, in what occasion in the building’s lifecycle and by whom) and their verification (how, using what technology, which certification mechanisms).
- A semantic data model for European digital building logbooks.
- A data management plan for digital building logbooks.
- Propose enablers to facilitate the sharing of information (e.g., model/form for licencing rights), including solutions for anonymised data sharing for the benefit of public and industrial stakeholders.
- A forecast of how new databases with linking potential for the digital building logbook will evolve. New opportunities and emerging technologies and tools allowing collecting data (e.g., sensors) open new possibilities and responsibilities in terms of data privacy and security.

Following approval by the contracting authority of preliminary draft versions, by month 17, the contractor will have to deliver:
A set of technical and detailed **guidelines to the Member States** on setting up and operationalising digital building logbooks under a common EU framework and on a voluntary basis. The guidelines should be in digital format with possibilities of (part of them) becoming a printable handbook. The tenderers should share their plan of implementing these guidelines, including a preliminary structure and in terms of format apart from pdf, video tutorials, infographics and other means.

The guidelines should incorporate all the above-mentioned deliverables, as well as:

1. A presentation of the **benefits** of logbooks (building the case for the use of logbooks) for the direct and indirect users and beneficiaries (from owners, authorities and financial institutions to construction professionals and utilities companies) to facilitate the establishment of logbooks in MS and be used as arguments during national level awareness-raising.

2. A detailed and justified proposal on the **steps to take in the enforcement of logbooks** (type of buildings to require a logbook first, step in their lifecycle that triggers implementation etc.), considering successful and unsuccessful case studies, as well as principal bottlenecks in national regulatory frameworks.

3. An **estimation of the needed resources** (budget, human, technical infrastructure, and others) to operationalise digital building logbooks in EU level and per Member State, considering the current lack of centralised storage, the feasibility of relying mostly to existing databases and the potential development of a construction data space in EU level.

4. Identification of main **risks** in the implementation of the logbooks (such as malware or leakage of sensitive information, regulatory barriers, or stakeholder opposition) and proposal of mitigation mechanisms.

### 1.4.1.3 Stakeholder involvement

The tenderers should propose a **stakeholder engagement plan** that will feed into the development of the technical study and will allow the stakeholder participation and validation of its proposals. For the consultations and validations of the results the contractor may use surveys, interviews, workshops, or other means. The contracting authority will review in advance the lists of stakeholders to be consulted, the nature and content of the consultations.

The tender should include the targets that commits to (number of events, number of participants for the events, reach of dissemination activities, and number of responders). A comprehensive timeline linking the consultations and awareness raising with the work and delivery of other tasks requested should be submitted in the tender.

The tenderers are invited to propose an innovative approach for delivering all requested services, intermediary deliverables, receiving early feedback and validation from the contracting authority and engaging with stakeholders. Regarding the later, as minimum requirements are defined:

- The organisation of at least 5 half-day workshops/webinars involving stakeholders to collect feedback and test the validity of recommendations.
- The organisation of full day event in the last month of the contract to present all deliverables to representatives of all Member States, EU level construction stakeholders and Commission services.
- The presence of the contractor to at least 9 events spread across the implementation period of the contract in order to present (intermediary) findings.

- The creation, approval by the contracting authority and publication of at least 2 items per month of implementation of the contract (articles, posts, infographics etc.) through various channels of third parties or of the contracting authority (being newsletters, websites etc.) to disseminate progress and results.

- The creation of an expert/principal stakeholder pool with experts/key stakeholders assuring EU level and national representation and the regular consultation with them.

- Lastly the conduct of at least 3 surveys (scoping phase, input to initial recommendations and validation of results) with the broader stakeholder community (relevant Commission services, public authorities in all EU MS, industrial and other stakeholders).

1.4.1.4 **Organisation of work and communication with the contracting authority**

- The tenderers should propose a comprehensive plan of how, when and by whom the tasks and subtasks described will be executed. The plan should include the proposed sequence of the different tasks, the preparatory work and research and stakeholder engagement.

- The tenderers should propose their plan for communication with the contracting authority to approve in advance and in a timely way and validate all different tasks and services to be delivered. The approach of the contractor in executing any task should be discussed in advance with the contracting authority and approved when completed.

The contractor will have to refine and adjust the work plan and the stakeholder engagement plan within the first 2 months of implementation following the feedback of the contracting authority.

1.4.1.5 **Format of documents, reports, publications**

**General reporting requirements**

The contractor must ensure that all deliverables under this contract are clear, concise and focused on their purpose. All deliverables shall be written in English, reviewed and corrected by a native (or certified C2 level) speaker before submission.

All deliverables are presented as draft documents to be discussed and finalised based on the comments received from Commission services.

The Commission shall approve or reject the Final deliverables as specified in article I.5.3 of the contract.

**Publication**

The deliverables of the study (including executive summary, abstract, annexes) will be published on the DG Internal Market, Industry, Entrepreneurship and SMEs internet site, on the EU Bookshop website and on other web-sites in relation to the study.

The publishable documents must include:

28 The contractor has to assure that all 27 EU MS are adequately and equally consulted.
• 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/study/article/publication...] are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

The Commission 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. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility29 for information providers.

For the publishable versions of the study, executive summary or other reports, the contractor must respect the W3C guidelines30 for accessible pdf documents.

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.

A 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 European Commission's contractors. No template will be provided to tenderers while preparing their tenders.

**Timetable**

<table>
<thead>
<tr>
<th>Time-line</th>
<th>Meetings</th>
<th>Reports</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract signature (T0)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 2</td>
<td>Kick-off meeting with the Commission services</td>
<td>5 working days after the meeting, submission of:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Work plan fine-tuned</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Minutes</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>10 days from submission: EC approval of minutes and work plan, or comments</td>
<td></td>
</tr>
<tr>
<td>Between the kick off and until the finalisation of</td>
<td>Regular update on the progress of work and presentation of draft intermediary deliverables for approval to the contracting authority.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

29 [https://wikis.ec.europa.eu/display/WEBGUIDE/01.+Accessibility+overview](https://wikis.ec.europa.eu/display/WEBGUIDE/01.+Accessibility+overview)
30 [https://www.w3.org/WAI/WCAG21/Understanding/](https://www.w3.org/WAI/WCAG21/Understanding/)
the study

<table>
<thead>
<tr>
<th>Month 6</th>
<th>Progress report</th>
<th>Interim payment (20%) After approval of progress report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 9</td>
<td>Interim report and Interim meeting</td>
<td></td>
</tr>
</tbody>
</table>
| 1 week after the interim meeting | Submission of: 
- Interim report fine-tuned 
- Minutes of the meeting | Interim payment (30%) After approval of interim report |
| Month 18 | Final Meeting, Presentation and submission of the deliverables | Balance payment After approval of final report |

1.5 Place of performance: where will the contract be performed?

The services will be performed at the contractor's premises.

1.6 Nature of the contract: how will the contract be implemented?

| The procedure will result in the conclusion of a direct contract. |
| In direct contracts all the terms governing the provision of the services, supplies or works are defined at the outset. Once signed, they can be implemented directly without any further contract procedures. |
| Tenderers need to take full account of the provisions of the draft contract as the latter will define and govern the contractual relationship(s) to be established between the Contracting authority and the successful tenderer(s). Special attention is to be paid to the provisions specifying the rights and obligations of the contractor, in particular those on payments, performance of the contract, confidentiality, and checks and audits. |

1.7 Volume and value of the contract: how much do we plan to buy?

| The estimated total amount of all purchases under this contract is indicated under Heading II.1.5 of the contract notice. The quantities/services to be purchased over the total duration of the contract are specified in Section 1.4 of these specifications. |

1.8 Duration of the contract: how long do we plan to use the contract?

The contract(s) resulting from the award of this call for tenders will be concluded for at most 18 months. The details of the initial contract duration and possible renewals are set out in Article I.3 of the draft contract.
1.9 **Electronic exchange system: can exchanges under the contract be automated?**

For all exchanges with the contractor during the implementation of the contract as well as for future possible subsequent proceedings for the purposes of EDES (European Union’s Early Detection and Exclusion System) the Contracting authority may use an electronic exchange system meeting the requirements of Article 148 of Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union. At the request of the Contracting authority the use of such a system shall become mandatory for the contractor(s) at no additional cost for the Contracting authority. Details on specifications, access, terms and conditions of use will be provided in advance.
2 GENERAL INFORMATION ON TENDERING

2.1 Legal basis: what are the rules?

This call for tenders is governed by the provisions of Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union (the Financial Regulation)\(^\text{31}\).

The *Contracting authority* has chosen to award the contract resulting from this call for tenders through an open procedure pursuant to Article 164(1) (a) of the Financial Regulation. In an open procedure any interested economic operator (any natural or legal person who offers to supply products, provide services or execute works) may submit a tender.

2.2 Rules on access to procurement: who may submit a tender?

Participation in this call for tenders 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 European Union in the field of public procurement on the conditions laid down in that agreement. Where the Agreement on Government Procurement\(^\text{32}\) concluded within the World Trade Organisation applies, the participation to this call for tenders is open to all natural and legal persons established in the countries that have ratified this Agreement, on the conditions laid down therein.

The rules on access to procurement do not apply to subcontractors. Subcontracting may not be used with the intent to circumvent the rules on access to procurement.

To enable the *Contracting authority* to verify the access, each tenderer must indicate its country of establishment (and in case of joint tender – the country of establishment of each group member) and must present the supporting evidence normally acceptable under the law of that country/-ies. The same document(s) could be used to prove country/-ies of establishment and the delegation(s) of the authorisation to sign as described in *Section 4.3*.

2.3 Registration in the Participant Register: why register?

Any economic operator willing to submit a tender for this call for tenders must be registered in the Participant Register, - an online register of organisations and natural persons participating in European Commission's calls for tenders or proposals (participants).

On registering each participant obtains a Participant Identification Code (PIC, 9-digit number) which acts as its unique identifier in the Participant Register. A participant needs to register only


once – the information provided can be further updated or re-used by the participant in other European Commission’s calls for tenders or calls for proposals.

Please provide information about the SME status of the participant in the Participant Register by filling in the SME Declaration section in the Participant Register. The section becomes available only when updating/modifying the details of the registered organisation.

At any moment during the procurement procedure the Research Executive Agency Validation Services (hereafter the EU Validation Services) may contact the participant and ask for supporting documents on legal existence and status. The requests will be made through the register’s messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly. The documents that may be requested by the EU Validation Services are listed in the EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment.

Please note that a request for supporting documents by the EU Validation Services in no way implies that the tenderer has been successful.

2.4 Ways to submit a tender: how can economic operators organise themselves to submit a tender?

Economic operators can submit a tender either as a sole economic operator (sole tenderer) or as a group of economic operators (joint tender). In either case subcontracting is permitted.

In order to fulfil the selection criteria set out in Section 3.2 the tenderer can rely on the capacities of subcontractors or other entities that are not subcontractors.

The role of each entity involved in a tender (hereafter referred to as “involved entity”) must be clearly specified in the eSubmission application: i) sole tenderer, ii) Group leader of a group of tenderers, iii) member of a group of tenderers, or iv) subcontractor. For an entity on whose capacities the tenderer relies to fulfil the selection criteria (that is not a subcontractor), this role is defined in the commitment letter (Annex 5.2). This applies also where the involved entities belong to the same economic group.

2.4.1 Joint tenders

A joint tender is a situation where a tender is submitted by a group (with or without legal form) of economic operators regardless of the link they have between them. The group as a whole is considered a tenderer.

All members of the group assume joint and several liability towards the Contracting authority for the performance of the contract as a whole.

References to tenderer or tenderers in this document shall be understood as covering both sole tenderers and groups of economic operators submitting a joint tender.
Group members must appoint a *Group leader* and a single point of contact authorised to act on their behalf in connection with the submission of the tender and all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contract signature. The model power of attorney attached in *Annex 3* is to be used.

The joint tender must clearly indicate the role and tasks of each member and of the *Group leader* who will act as the *Contracting authority*’s contact point for the contract's administrative or financial aspects and operational management. The *Group leader* will have full authority to bind the group and each of its members during contract execution. If the joint tender is successful, the *Contracting authority* shall sign the contract with the Group leader, authorised by the other members to sign the contract on their behalf via power of attorney drawn up in the model attached in *Annex 3*.

Changes in the composition of the group during the procurement procedure (after the submission deadline and before contract signature) shall lead to rejection of the tender except in case of a merger or takeover of a member of the group (universal succession), provided that the new entity has access to procurement (see *Section 2.2*) and is not in an exclusion situation, (see *Section 3.1*).

In any case the selection criteria must be still fulfilled by the group and the terms of the originally submitted tender may not be altered substantially, i.e. all the tasks assigned to the former entity must be taken over by the new entity member of the group, the change must not make the tender non-compliant with the tender specifications, and the evaluation of award criteria of the originally submitted tender may not be modified.

### 2.4.2 Subcontracting

Subcontracting is the situation where the contractor enters into legal commitments with other economic operators which will perform part of the contract on its behalf. The contractor retains full liability towards the *Contracting authority* for performance of the contract as a whole.

The following shall not be considered subcontracting:

a) Use of workers posted to the contractor by another company owned by the same group and established in a Member State (“intra-group posting” as defined by Article 1, 3, (b) of *Directive 96/71/EC concerning the posting of workers in the framework of the provision of services*).

b) Use of workers hired out to the contractor by a temporary employment undertaking or placement agency established in a Member State (“hiring out of workers” as defined by Article 1, 3, (c) of *Directive 96/71/EC concerning the posting of workers in the framework of the provision of services*).

c) Use of workers temporarily transferred to the contractor from an undertaking established outside the territory of a Member State and that belongs to the same group (“intra-corporate transfer” as defined by Article 3, (b) of *Directive 2014/66/EU on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer*).

d) Use of staff without employment contract (“self-employed persons working for the contractor”), without the tasks of the self-employed persons being particular well-defined parts of the contract.
e) Use of suppliers and/or transporters by the contractor, in order to perform the contract at the place of performance, unless the economic activities of the suppliers and/or the transporting services are within the subject of this call for tenders (see Section 1.4).
f) Performance of part of the contract by members of an EEIG (European Economic Interest Grouping), when the EEIG is itself a contractor or a group member.

The persons mentioned in points a), b), c) and d) above will be considered as “personnel” of the contractor as defined in the contract.

All contractual tasks may be subcontracted unless the Technical specifications expressly reserve the execution of certain critical tasks to the sole tenderer itself, or in case of a joint tender, to a member of the group.

By filling in the form available in Annex 4, tenderers are required to give an indication of the proportion of the contract that they intend to subcontract, as well as to identify and describe briefly the envisaged contractual roles/tasks of subcontractors meeting any of these conditions (hereafter referred to as identified subcontractors):

- on whose capacities the tenderer relies upon to fulfil the selection criteria as described under Section 3.2;
- whose individual share of the contract, known at the time of submission, is above 10%.

Any such subcontractor must provide the tenderer with a commitment letter drawn up in the model attached in Annex 5.1 and signed by its authorised representative.

Changes concerning subcontractors identified in the tender (withdrawal/replacement of a subcontractor, additional subcontracting) during the procurement procedure (after the submission deadline and before contract signature) require the prior written approval of the Contracting authority subject to the following verifications:

- any new subcontractor is not in an exclusion situation;
- the tenderer still fulfils the selection criteria and the new subcontractor fulfils the selection criteria applicable to it individually, if any;
- the terms of the originally submitted tender are not altered substantially, i.e. all the tasks assigned to the former subcontractor are taken over by another involved entity, the change does not make the tender non-compliant with the tender specifications, and the evaluation of award criteria of the originally submitted tender is not modified.

Subcontracting to subcontractors identified in a tender that was accepted by the Contracting authority and resulted in a signed contract, is considered authorised.

2.4.3 Entities on whose capacities the tenderer relies to fulfil the selection criteria

In order to fulfil the selection criteria a tenderer may also rely on the capacities of other entities, regardless of the legal nature of the links it has with them. It must in that case prove that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment letter in the model attached in Annex 5.2, signed by the authorised representative of such an entity, and the supporting evidence that those other entities have the respective resources. If the contract is awarded to a tenderer intending to rely on another entity to meet the minimum levels of economic and financial capacity, the Contracting
authority may require the entity to sign the contract or, alternatively, to provide a joint and several first-call financial guarantee for the performance of the contract.

With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required.

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Relying on the capacities of other entities is only necessary when the capacity of the tenderer is not sufficient to fulfil the required minimum levels of capacity. Abstract commitments that other entities will put resources at the disposal of the tenderer will be disregarded.
3 EVALUATION AND AWARD

The evaluation of the tenders that comply with the submission conditions will consist of the following elements:

- Check if the tenderer has access to procurement (see Section 2.2);
- Verification of administrative compliance (if the tender is drawn up in one of the official EU languages and the required documents signed by duly authorised representative(s) of the tenderer);
- 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 specified in the procurement documents;
- Evaluation of tenders on the basis of the award criteria.

The Contracting authority will evaluate the abovementioned elements in the order that it considers to be the most appropriate. If the evaluation of one or more elements demonstrates that there are grounds for rejection, the tender will be rejected and will not be subjected to further full evaluation. The unsuccessful tenderers will be informed of the ground for rejection without being given feedback on the non-assessed content of their tenders. Only tenderer(s) for whom the verification of all elements did not reveal grounds for rejection can be awarded the contract.

The evaluation will be based on the information and evidence contained in the tenders and, if applicable, on additional information and evidence provided at the request of the Contracting authority during the procedure. If any of the declarations or information provided proves to be false, the Contracting authority may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

For the purposes of the evaluation related to exclusion and selection criteria the Contracting authority may also refer to publicly available information, in particular evidence that it can access on a national database free of charge.

3.1 Exclusion criteria

The objective of the exclusion criteria is to assess whether the tenderer is in any of the exclusion situations listed in Article 136(1) of the Financial Regulation.

Tenderers found to be in an exclusion situation will be rejected.

As evidence of non-exclusion each tenderer needs to submit with its tender a Declaration on Honour\(^{34}\) in the model available in Annex 2.\(^{35}\) The declaration must be signed by an authorised representative of the entity providing the declaration.

\(^{34}\) The European Single Procurement Document (ESPD) may not be used yet in European Commission’s calls for tenders.

\(^{35}\) Unless the same declaration has already been submitted for the purposes of another award procedure of the European Commission, the situation has not changed, and the time elapsed since the issuing date of the declaration does not exceed one year.
The initial verification of non-exclusion of tenderers will be done on the basis of the submitted declarations and consultation of the European Union's Early Detection and Exclusion System. The documents mentioned as supporting evidence in the Declaration on Honour need to be provided whenever requested and where this is necessary to ensure the proper conduct of the procedure within a deadline given by the Contracting authority.

Annex 1 specifies which of the involved entities participating in a tender need to provide the Declaration on Honour and, when requested by the Contracting authority, the supporting evidence.

Before the award decision, the contracting authority may request documentary evidence on compliance on the exclusion criteria set out in the present tender specifications. All tenderers are invited to prepare in advance the documents related to the evidence, since they may be requested to provide such evidence within a short deadline. Failure to provide valid documentary evidence within the deadline set by the Contracting Authority shall lead to the rejection of the tender for the award of the contract, unless the tenderer can justify the failure on the grounds of material impossibility.

Please note that a request for evidence in no way implies that the tenderer has been successful.

3.2 Selection criteria

The objective of the selection criteria is to assess whether the tenderer has the legal, regulatory, economic, financial, technical and professional capacity to perform the contract.

The selection criteria for this call for tenders, including the minimum levels of capacity, the basis for assessment and the evidence required, are specified in the following subsections.

Tenders submitted by tenderers not meeting the minimum levels of capacity will be rejected.

When submitting its tender each tenderer shall declare on honour that it fulfils the selection criteria for the call for tenders. The model Declaration on Honour available in Annex 2 shall be used.

The initial assessment of whether a tenderer fulfils the selection criteria will be done on the basis of the submitted declaration(s).

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36 The obligation to provide the supporting evidence will be waived in the following situations:
- if the same documents have already been provided in a previous award procedure of the European Commission, have been issued no more than one year before the date of their request by the Contracting authority and are still valid at that date;
- if such evidence can be accessed by the Contracting authority on a national database free of charge, in which case the economic operator shall provide the Contracting authority with the internet address of the database and, if needed, the necessary identification data to retrieve the document;
- if there is a material impossibility to provide such evidence.
The subsections below specify which selection criteria evidence must be provided with the tender or may be requested later, at any time during the procurement procedure\(^{37}\). In any case, to the extent that there is no ground for a waiver, the evidence must be provided, upon request and within a deadline given by the *Contracting authority*. The evidence must be provided in accordance with the applicable basis for assessment of each criterion: in case of a consolidated assessment – only by the *involved entities* who contribute to the fulfilment of the criterion, and in case of individual assessment – by each *involved entity* to whom the criterion applies individually.

Before the award decision, the contracting authority may request documentary evidence on compliance with the selection criteria set out in the present tender specifications. All tenderers are **invited to prepare in advance the documents related to the evidence**, since they may be requested to provide such evidence in a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract, will be requested to provide such evidence.

Failure to provide valid documentary evidence within the deadline set by the Contracting Authority shall lead to the rejection of the tender for the award of the contract, unless the tenderer can justify the failure on the grounds of material impossibility.

**1.1.1. Legal and regulatory capacity**

Tenderers do not need to prove specific legal and regulatory capacity to perform the contract.

**3.2.1 Economic and financial capacity**

Tenderers must comply with the following selection criteria in order to prove that they have

<table>
<thead>
<tr>
<th>Criterion F1</th>
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<tbody>
<tr>
<td><strong>Minimum level of capacity</strong></td>
</tr>
<tr>
<td>Total yearly turnover for all members of the consortium of the last 2 financial years above EUR 300 000.</td>
</tr>
<tr>
<td><strong>Basis for assessment</strong></td>
</tr>
<tr>
<td>This criterion applies to the tenderer, i.e. a consolidated assessment of the combined capacities of all <em>involved entities</em> will be carried out.</td>
</tr>
<tr>
<td><strong>Evidence</strong></td>
</tr>
<tr>
<td>Copy of the profit and loss accounts and balance sheets for the last 2 years for which accounts have been closed from each concerned <em>involved entity</em>, or, failing that, appropriate statements from banks. The most recent year must have been closed within the last 18 months.</td>
</tr>
</tbody>
</table>

\(^{37}\) The obligation to provide the supporting evidence will be waived in the following situations:

- if the same documents have already been provided in a previous award procedure of the European Commission and are still up-to-date;
- if such evidence can be accessed by the *Contracting authority* on a national database free of charge, in which case the economic operator shall provide the *Contracting authority* with the internet address of the database and, if needed, the necessary identification data to retrieve the document.
All of the above specified evidence of economic and financial capacity must be provided with the tender.

3.2.2 Technical and professional capacity

Tenderers must comply with the following selection criteria in order to prove that they have the necessary technical and professional capacity to perform the contract.

The tenderers are asked to propose a core team of minimum 6 persons for the implementation of the action. Each member of the team shall have a very good knowledge of English (writing and speaking).

<table>
<thead>
<tr>
<th>Criterion T1</th>
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<tbody>
<tr>
<td><strong>The tenderers are asked to propose a core team of minimum 6 persons for the implementation of the action with very good drafting skills; experience in drafting reports, analysis, legal information, public information.</strong></td>
</tr>
<tr>
<td><strong>Minimum level of capacity</strong></td>
</tr>
<tr>
<td><strong>Basis for assessment</strong></td>
</tr>
<tr>
<td><strong>Evidence</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Criterion T2</th>
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<tbody>
<tr>
<td><strong>The tenderer must prove experience in the field of construction and the built environment.</strong></td>
</tr>
<tr>
<td><strong>Minimum level of capacity</strong></td>
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<tr>
<td><strong>Basis for assessment</strong></td>
</tr>
<tr>
<td><strong>Evidence</strong></td>
</tr>
</tbody>
</table>

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<tr>
<th>Criterion T3</th>
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</thead>
<tbody>
<tr>
<td><strong>At least 3 team members with experience in the development of tools/platforms/databases that serve the construction sector, or the management of buildings or of the built environment or public sector operations.</strong></td>
</tr>
<tr>
<td><strong>Minimum level of capacity</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
or in the context of multi-country (over 2 countries) research projects.

<table>
<thead>
<tr>
<th>Basis for assessment</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>This criterion applies to each team member.</td>
<td>CV of the team members with web links or annexed documents of their participating projects.</td>
</tr>
</tbody>
</table>

**Criterion T4**

**At least 3 team members with experience in stakeholder engagement, consultation, and event organisation**

<table>
<thead>
<tr>
<th>Minimum level of capacity</th>
<th>Basis for assessment</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least 3 years’ experience</td>
<td>This criterion applies to each team member.</td>
<td>CV of the team members with web links or annexed documents of their participating projects.</td>
</tr>
</tbody>
</table>

**Criterion T5**

**At least one knowledge manager should be involved throughout the execution of the contract involved in the coordination of the different work streams**

<table>
<thead>
<tr>
<th>Minimum level of capacity</th>
<th>Basis for assessment</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least 5 years of working experience as knowledge manager, or university degree in knowledge management and 2 years of experience.</td>
<td>This criterion applies to one team member.</td>
<td>University degree (in the second case) and CV with links/references including the job description.</td>
</tr>
</tbody>
</table>

**Criterion T6**

**A software engineer with experience in the development of complex tools and platforms that include linking of databases.**

<table>
<thead>
<tr>
<th>Minimum level of capacity</th>
<th>Basis for assessment</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least 5 years experience and holder of bachelor’s and Master's degree (300 ECTs),</td>
<td>This criterion applies to one team member.</td>
<td>University degree and CV with links/references including the job description.</td>
</tr>
</tbody>
</table>

⚠️ All of the above specified evidence of technical and professional capacity must be provided with the tender.

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3.3 Compliance with the minimum requirements specified in the procurement documents

By submitting a tender a tenderer commits to perform the contract in full compliance with the terms and conditions of the procurement documents for this call for tenders. Particular attention is drawn to the minimum requirements specified in Section 1.4 of these specifications and to the fact that tenders must comply with applicable data protection, 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.

The minimum requirements shall be observed throughout the entire duration of the contract. Compliance with these requirements is mandatory and cannot be subject to any assumptions, limitations, conditions, or reservations on the part of a tenderer.

| Tenders that are not compliant with the applicable minimum requirements shall be rejected. |

3.4 Award criteria

The objective of the award criteria is to evaluate the tenders with a view to choosing the most economically advantageous tender.

Tenders will be evaluated on the basis of the following award criteria and their weighting:

1. Price - 30%

The price considered for evaluation will be the total price of the tender, covering all the requirements set out in the tender specifications. Tenders presenting a total price superior to the maximum amount of EUR 750,000 will be excluded from the rest of the assessment procedure.

2. Quality – 70%

The quality of the tender will be evaluated with a maximum of 100 points based on the following criteria:
<table>
<thead>
<tr>
<th>Criterion</th>
<th>Qualitative Award Criteria</th>
<th>Weighting (maximum points)</th>
</tr>
</thead>
</table>
| 1.        | Understanding of the requirements, organisation, and quality of the proposal  
This criterion will assess the following:  
- Completeness of the offer, all needs and tasks described in the specifications are taken into account.  
- Capacity of the tenderer to explain in detail and clarity the steps to undertake for the completion of each deliverable.  
- Understanding of the requested services, demonstration of knowledge of existing and relative initiatives.  
- Proposal of a comprehensive timeline for the execution of the tasks, including necessary preparatory steps as research, engagement of experts, approval from the client | 40 |
| 2.        | Team structure, communication with the contracting authority, stakeholder engagement  
This criterion will assess the following:  
- Quality of the proposed stakeholder engagement plan including number of activities, time planning throughout their execution of the contract in alignment with other activities, engagement targets, proposal of principal target audiences, identification of risks and their mitigation plan.  
- Team structure proposal including pairing of people and tasks in an efficient manner (time allocated, task to be delivered).  
- Proposal of an efficient plan for communication with the contracting authority throughout the project execution assuring agreement and validation in a regular basis. | 30 |
| 3.        | Innovation of the offer  
This criterion will assess the following:  
- Understanding of technological developments, and detail of the proposal in resolving technical challenges in the implementation of logbooks.  
- Proposals on creating an EU wide tool while responding to different conditions in the different MS. The bid takes adequately into account removing or keeping to the absolute minimum administrative burdens in the development of digital building logbooks.  
- Approach presented for the role of logbook as getaway, proposal for the interface/central platform and the development of its visual identity and sections.  
- Proposed structure, means of presentation and other innovative proposals for the guidelines to public authorities. | 30 |

Total number of points 100

The selected tender is assessed according to the above qualitative award criteria and the weighting applicable to each criterion.

**Tenders scoring**

* less than 70 % in the overall points total or  
* less than 50% in the points awarded for a single criterion  
will be excluded from the rest of the assessment procedure.
3.5 Award (ranking of tenders)

Tenders shall be ranked according to the best price-quality ratio in accordance with the formula below:

\[
\text{Score for Tender X} = (\text{Technical Score} \times 0.7) + [(\text{Lowest price}/\text{Price of Tender X}) \times 100] \times 0.3
\]

Where the "lowest price" refers to the lowest price among the tenders having passed the quality threshold

Should the outcome of the formula lead to two or more tenders with the same result, the tenderer who has been awarded the highest marks for award criterion 1 will be deemed to be the most economically advantageous tender. This approach will continue to be applied to each of the award criteria in the descending order listed above.

The contract shall be awarded to the tender ranked first, which complies with the minimum requirements specified in the procurement documents and is submitted by a tenderer having access to procurement, not in an exclusion situation and fulfilling with the selection criteria.
4 FORM AND CONTENT OF THE TENDER

4.1 Form of the tender: how to submit the tender?

Tenders are to be submitted via the eSubmission application according to the instructions laid down in the Invitation to tender letter and the eSubmission Quick Guide.

Make sure you prepare and submit your electronic tender in eSubmission early enough to ensure it is received within the deadline specified under Heading IV.2.2 of the contract notice.

4.2 Content of the tender: what documents to submit with the tender?

The documents to be submitted with the tender in eSubmission are listed in Annex I.

The following requirements apply to the technical and financial offer to be uploaded in eSubmission:

- **Technical offer.**

  The technical offer must provide all the information needed to assess the compliance with Section 1.4 of these specifications and the award criteria. Tenders deviating from the minimum requirements or not covering all the requirements may be rejected on the basis of non-compliance and not evaluated further.

- **Financial offer.**

  A complete financial offer, including the breakdown of the price needs to be uploaded. [For this purpose, the Financial Model in Annex 6 shall be completed and uploaded in eSubmission. The total amount of the offer as indicated in cell D13 must be encoded in the field “Total amount” under the section “Tender data” in eSubmission].

  It is the responsibility of each tenderer to ensure that the total amount of the tender inserted in the eSubmission field “Total amount” corresponds to the amount indicated in the uploaded financial offer. In case of discrepancies, only the amount indicated in the financial offer will be taken into account.

  The financial offer shall be:

  - expressed in euros. 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.
  - quoted free of all duties, taxes and other charges, i.e. also free of VAT.

The European Union Institutions are exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union of 8 April 1965 annexed to the Treaty on the Functioning of the European Union. Exemption is granted to the Commission by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption.
In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact his or her national authorities to clarify the way in which the European Union is exempt from VAT.

4.3 Signature policy: how can documents be signed?

Where a document needs to be signed, the signature must be either hand-written or a qualified electronic signature as defined in Regulation (EU) No 910/2014 on electronic identification and trust services for electronic transactions in the internal market (the eIDAS Regulation).

For hand-written signatures see Section 1 of the Invitation to tender.

For electronic signatures see: https://webgate.ec.europa.eu/fpfis/wikis/x/YIrgIw

All documents must be signed by the signatories (when they are individuals) or by their duly authorised representatives.

For the following documents, when signed by representatives, tenderers must provide evidence for the delegation of the authorisation to sign:

- The Declaration on Honour of the tenderer (in case of joint tender – the Declarations on Honour of all group members);
- (If applicable – in the case of joint tender) the power(s) of attorney drawn up using the model attached in Annex 3).

The delegation of the authorisation to sign on behalf of the signatories (including, in the case of proxy(-ies), the chain of authorisations) must be evidenced by appropriate written evidence (copy of the notice of appointment of the persons authorised to represent the legal entity in signing contracts (together or alone), or a copy of the publication of such appointment if the legislation which applies to signatory requires such publication or a power of attorney). A document that the Contracting authority can access on a national database free of charge does not need to be submitted if the Contracting authority is provided with the exact internet link and, if applicable, the necessary identification data to retrieve the document.

4.4 Confidentiality of tenders: what information and under what conditions can be disclosed?

Once the Contracting authority has opened a tender, it becomes its property and shall be treated confidentially, subject to the following:

- For the purposes of evaluating the tender and, if applicable, implementing the contract, performing audits, benchmarking, etc., the Contracting authority is entitled to make available (any part of) the tender to its staff and the staff of other Union institutions, agencies and bodies, as well as to other persons and entities working for the Contracting authority or cooperating with it, including contractors or subcontractors and their staff provided that they are bound by an obligation of confidentiality.

- After the signature of the award decision tenderers whose tenders were received in accordance with the submission modalities, who have access to procurement, who are not found to be in an exclusion situation referred to in Article 136(1) of the FR, who are not rejected under Article 141 of the FR, whose tenders are not found to be
incompliant with the procurement documents, and who make a request in writing will be notified of the name of the tenderer to whom the contract is awarded, the characteristics and relative advantages of the successful tender and the price of the offer and/or contract value. The Contracting authority may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial offer, technical or trade secrets\textsuperscript{38}. 

- The Contracting authority may disclose the submitted tender in the context of a request for public access to documents, or in other cases where the applicable law requires its disclosure. Unless there is an overriding public interest in disclosure\textsuperscript{39}, the Contracting authority may refuse to provide full access to the submitted tender, redacting the parts (if any) that contain confidential information, the disclosure of which would undermine the protection of commercial interests of the tenderer, including intellectual property.

G The Contracting authority will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. The Contracting authority reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

\textsuperscript{38} For the definition of trade secrets please see Article 2 (1) of DIRECTIVE (EU) 2016/943 on the protection of undisclosed know-how and business information (trade secrets) against their unlawful acquisition, use and disclosure.

\textsuperscript{39} See Article 4 (2) of the REGULATION (EC) No 1049/2001 regarding public access to European Parliament, Council and Commission documents.
**APPENDIX: LIST OF REFERENCES**

<table>
<thead>
<tr>
<th>Term</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award criteria</td>
<td>See Section 3.4</td>
</tr>
<tr>
<td>Contracting authority</td>
<td>See Section 1.1</td>
</tr>
<tr>
<td>Entities on whose capacities the tenderer relies to fulfil the selection criteria</td>
<td>See Section 2.4.3</td>
</tr>
<tr>
<td>EU Validation services</td>
<td>See Section 2.3.</td>
</tr>
<tr>
<td></td>
<td><strong>EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment</strong></td>
</tr>
<tr>
<td>Exclusion criteria</td>
<td>See Section 3.1</td>
</tr>
<tr>
<td>Financial Regulation</td>
<td>See Section 3.1</td>
</tr>
<tr>
<td>Framework contract</td>
<td>See Section 1.6</td>
</tr>
<tr>
<td>Framework contract ceiling</td>
<td>See Section 1.6</td>
</tr>
<tr>
<td>Group leader</td>
<td>See Section 2.4.1</td>
</tr>
<tr>
<td>Identified subcontractors</td>
<td>See Section 2.4.2</td>
</tr>
<tr>
<td>Involved entities</td>
<td>See Section 2.4</td>
</tr>
<tr>
<td>Joint tender</td>
<td>See Section 2.4.1</td>
</tr>
<tr>
<td>Participating entities</td>
<td>See Section 1.1</td>
</tr>
<tr>
<td>Participant Register</td>
<td>See Section 2.3.</td>
</tr>
<tr>
<td></td>
<td><strong><a href="https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register">https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register</a></strong></td>
</tr>
<tr>
<td>Selection criteria</td>
<td>See Section 3.2</td>
</tr>
<tr>
<td>Sole tenderer</td>
<td>See Section 2.4</td>
</tr>
<tr>
<td>Subcontracting/subcontractor</td>
<td>See Section 2.4.2</td>
</tr>
<tr>
<td>Treaties</td>
<td>See Section 2.3.</td>
</tr>
<tr>
<td></td>
<td><strong>The EU Treaties:</strong></td>
</tr>
<tr>
<td></td>
<td><strong><a href="https://europa.eu/european-union/law/treaties_en">https://europa.eu/european-union/law/treaties_en</a></strong></td>
</tr>
</tbody>
</table>
ANNEXES
Annex 1. List of documents to be submitted with the tender or during the procedure

<table>
<thead>
<tr>
<th>Description</th>
<th>Sole tenderer</th>
<th>Joint tender</th>
<th>Identified Subcontractor</th>
<th>Entity on whose capacity is being relied</th>
<th>When and where to submit the document?</th>
<th>Instructions for uploading in eSubmission (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Group leader</td>
<td>Member of the group</td>
<td></td>
<td></td>
<td></td>
<td>How to name the file? Where to upload?</td>
</tr>
</tbody>
</table>

### 1. Identification and information about the tenderer.

**eSubmission view**

![Diagram of eSubmission process](image)

**Declaration on Honour on Exclusion and Selection Criteria** (see Section 3.1)

- With the tender in eSubmission
- 'Declaration on Honour'
- With the concerned entity under 'Parties'
  - 'Identification tenderer'
  - 'Attachments'
  - 'Declaration on Honour'.

For entities on whose capacity is being relied and who are not subcontractors, the document must be uploaded in the section of the Sole tenderer or Group leader:

- 'Identification tenderer'
- 'Attachments'
- 'Other'
<table>
<thead>
<tr>
<th>Evidence that the person signing the documents is an authorised representative of the entity</th>
<th>☒</th>
<th>☒</th>
<th>☒</th>
<th>With the tender in eSubmission</th>
<th>'Authorisation to sign' documents'.</th>
<th>With the concerned entity under 'Parties' → 'Identification tenderer' → 'Attachments' → 'Other documents'.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Power of attorney</strong>&lt;br&gt;(see Section 2.4.1)&lt;br&gt;model in Error! Not a valid result for table.</td>
<td>☒</td>
<td></td>
<td></td>
<td>With the tender in eSubmission</td>
<td>'Power of attorney'</td>
<td>In the Group leader's section under 'Parties' → 'Identification tenderer' → 'Attachments' → 'Other documents'.</td>
</tr>
<tr>
<td><strong>List of identified subcontractors</strong>&lt;br&gt;(see Section 2.4.2)&lt;br&gt;model in Annex 4. List of identified subcontractors</td>
<td>☒</td>
<td>☒</td>
<td></td>
<td>With the tender in eSubmission</td>
<td>“List of identified subcontractors”</td>
<td>In the Sole tenderer’s or the Group leader's section under 'Parties' → 'Identification tenderer' → 'Attachments' → 'Other documents'.</td>
</tr>
<tr>
<td><strong>Commitment letter</strong>&lt;br&gt;(see Section 2.4.2 and 2.4.3)</td>
<td>☒</td>
<td>☒</td>
<td></td>
<td>(model in Annex 5.1) (model in Annex 5.2)</td>
<td>'Commitment letter'</td>
<td>With the concerned entity under 'Parties' → 'Identification tenderer' → 'Attachments' → 'Other documents'.</td>
</tr>
<tr>
<td><strong>Evidence of non-exclusion</strong>&lt;br&gt;(see Section 3.1)</td>
<td>☒</td>
<td>☒</td>
<td>☒</td>
<td>Only upon request by the Contracting authority</td>
<td>n.a.</td>
<td>n.a.</td>
</tr>
</tbody>
</table>

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40 A document that the Contracting authority can access on a national database free of charge does not need to be submitted if the Contracting authority is provided with the exact internet link and, if applicable, the necessary identification data to retrieve the document.
| Evidence of legal existence and status | ☒ | ☒ | ☒ | At any time during the procedure | Only upon request by the EU Validation services | n.a. | n.a. |
| Evidence of legal capacity (see Section 3.2.1) | | | | | Only upon request by the Contracting authority | | n.a. |
| Evidence of economic and financial capacity F1 (see Section 3.2.2) | | | | The documents must be provided only by the involved entities who contribute to reaching the minimum capacity level for criterion F1 | With the tender in eSubmission | 'Balance_sheet_entity_year' | 'Group leader or the sole tenderer under 'Parties' → Identification tenderer' → 'Attachments' → 'Economic and financial capacity'. |
| Evidence of technical and professional capacity T1 to T5 (see Section 3.2.3) | | | | The documents must be provided only by the involved entities | With the tender in eSubmission | 'Tx-Project_reference_No.1' | 'Group leader or the sole tenderer under 'Parties' → Identification tenderer' → 'Attachments' → 'Technical and professional capacity'. |
who contribute to reaching the minimum capacity level for criteria T1 to T5

2. Tender data.

_eSubmission view_

<table>
<thead>
<tr>
<th>Ways to submit</th>
<th>Parties</th>
<th>Tender data</th>
<th>Submission report</th>
<th>Submit</th>
</tr>
</thead>
</table>

**Failure to upload the following documents in eSubmission will lead to rejection of the tender.**

<table>
<thead>
<tr>
<th>Technical offer</th>
<th>With the tender in eSubmission</th>
<th>'Technical offer'</th>
<th>Under section 'Tender Data' \rightarrow 'Technical offer'</th>
</tr>
</thead>
<tbody>
<tr>
<td>(see Section 4.2)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial offer</td>
<td>With the tender in eSubmission</td>
<td>'Financial offer'</td>
<td>Under 'Tender Data' \rightarrow 'Financial offer'</td>
</tr>
<tr>
<td>(see Section 4.2)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[model in Annex 6]</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Annex 2. Declaration on Honour on exclusion and selection criteria

Annex 2 is published as a separate document
Annex 3. Power of attorney

Call for tenders  GROW/2021/OP/0014
Technical study for the development and implementation of digital building logbooks

POWER OF ATTORNEY

The undersigned:

– Signatory  (Name, Function, Company, Registered address, VAT Number)

having the legal capacity required to act on behalf of his/her company,

HEREBY AGREES TO THE FOLLOWING:

1) To submit a joint tender as a member of a group of tenderers (the Group), constituted by Company 1, Company 2, Company N (Group members), and led by Company 1 (Group leader), in accordance with the conditions specified in the tender specifications and the terms specified in the tender to which this Power of attorney is attached.

2) If the Contracting authority awards the contract resulting from this call for tenders to the Group on the basis of the joint tender to which this power of attorney is attached, all Group members shall be considered parties to the contract in accordance with the following conditions:

   (a) All Group members shall be jointly and severally liable towards the Contracting authority for the performance of the contract.

   (b) All Group members shall comply with the terms and conditions of the contract and ensure the proper delivery of their respective share of the services and/or supplies subject to the contract.

3) Payments by the Contracting authority related to the services and/or supplies subject to the Contract shall be made through the bank account of the Group leader: [Provide details on bank, address, account number].

4) The Group members grant to the Group leader all the necessary powers to act on their behalf in the submission of the tender and the conclusion of the contract, including:

   (a) The Group leader shall submit the tender on behalf of all Group members and indicate in the "Tender Contact Info" section in eSubmission the name and e-mail address of an individual - single point of contact authorised to communicate officially with the Contracting authority in connection with the submitted tender on behalf of all Group members, including in connection with all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contract signature.

   (b) The Group leader shall sign any contractual documents — including the contract, and amendments thereto — and issue any invoices related to the performance of the contract on behalf of all Group members.

   (c) The Group leader shall act as a single contact point with the Contracting authority in the
It shall co-ordinate the delivery of the services and/or supplies by the Group to the Contracting authority, and shall see to a proper administration of the contract.

Any modification to the present Power of attorney shall be subject to the Contracting authority’s express approval. This Power of attorney shall expire when all the contractual obligations of the Group have ceased to exist. The parties cannot terminate it before that date without the Contracting authority’s consent.

Place and date:

Name (in capital letters), function, company and signature:
Annex 4. List of identified subcontractors

<table>
<thead>
<tr>
<th>Identification details</th>
<th>Roles/tasks during contract execution</th>
<th>Proportion of subcontracting (% of contract volume)</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Full official name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statutory registration number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VAT registration number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[Full official name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statutory registration number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>VAT registration number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[REPEAT AS MANY TIMES AS THE NUMBER OF IDENTIFIED SUBCONTRACTORS]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other subcontractors that do not need to be identified under Section 2.4.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL % of subcontracting</strong></td>
<td><strong>0.00%</strong></td>
<td></td>
</tr>
</tbody>
</table>
Annex 5.1. Commitment letter by an identified subcontractor

[Letterhead, if any]

EUROPEAN COMMISSION

Call for tenders Ref. GROW/2021/OP/0014

Attn:

[Insert date]

Commitment letter by identified subcontractor

I, the undersigned,

Name:

Function:

Company:

Registered address:

VAT Number:

having the legal capacity required to act on behalf of the company [insert name of the entity] hereby confirm that our company agrees to participate as subcontractor in the offer of [insert name of the tenderer] for the call for tenders GROW/2021/OP/0014 – Technical study for the development and implementation of digital building logbooks.

In the event that the tender of the aforementioned tenderer is successful, [insert name of the subcontractor] commits itself to make available the resources necessary for performance of the contract as a subcontractor and to carry out the services that will be subcontracted to it in compliance with the terms of the contract. It further declares that it is not subject to conflicting interests which may negatively affect the contract performance and that it accepts the general conditions attached to the tender specifications for the above call for tenders, in particular the contractual provisions related to checks and audits.

Done at:

Name:

Position:

Signature:
Annex 5.2. Commitment letter by an entity on whose capacities is being relied

[Letterhead, if any]

EUROPEAN COMMISSION

Call for tenders Ref. GROW/2021/OP/0014

Attn:

[Insert date]

Commitment letter by an entity on whose capacity is being relied

I, the undersigned,

Name:

Function:

Company:

Registered address:

VAT Number:

having the legal capacity required to act on behalf of the company [insert name of the entity] hereby confirm that our company authorises the [insert name of the tenderer] to rely on its [financial and economic capacity] [technical and professional capacity] in order to meet the minimum levels required for the call for tenders GROW/2021/OP/0014 – Technical study for the development and implementation of digital building logbooks.

In the event that the tender of the aforementioned tenderer is successful, [insert name of the entity] commits itself to make available the resources necessary for performance of the contract. It further declares that it is not subject to conflicting interests which may negatively affect the contract performance, and that it accepts the general conditions attached to the tender specifications for the above call for tenders, in particular the contractual provisions related to checks and audits.

Done at:

Name:

Position:

Signature:
Annex 6. Financial offer form

Annex 6 is published as a separate document