



Barcelona, 27 August 2020

ANSWERS TO QUESTIONS

External Evaluation of the Ministerial Declaration on Energy (2016) - 19 - PRO286ECA-2020

With reference to the above-mentioned procedure, please find below the answers to the questions posed by the interested companies:

REQUEST FOR CLARIFICATIONS Nr. 1 (dated Fri 17/07/2020 14:52)

Question 1: Please can you kindly confirm whether there is a minimum number of days foreseen for this contract and per category of expert?

Answer: There is no a minimum number of days foreseen for this contract per category of expert. Tenderers should, based on the methodology proposed, demonstrate that the offered number of working days is sufficient to reach the objective of the task.

REQUEST FOR CLARIFICATIONS Nr. 2 (dated Mon 20/07/2020 16:22)

Question 2: Incidental expenditure.

With regard to section 4.7 (requested services and activities – Missions – page 23 of 21):

- 'It is envisaged that the external evaluator (s) will conduct mission to Southern and Eastern Mediterranean Countries'

With regard to section 5 (logistics and timing – page 24 of 31):

- 'Most activities of the external evaluation, including phone interviews, surveys, data gathering and analysis, shall be carried out remotely. Regular briefings will be carried out by phone/Skype. The
- consultant/s will also be required to go on missions to the UfM Secretariat HQ either for consultation or to attend meetings of the UfM Energy Platforms to monitor the process and/or to present the work that has been undertaken with regards to the external evaluation. Several missions to UfM Southern and Eastern Mediterranean (SEMED) Member States are also foreseen for consultation...'

Section 6.5 (Incidental Expenditure – page 27 of 31) finally stipulates that incidental expenditure covers:

- 'Travel costs and subsistence allowances for missions, outside the normal place of posting, as part of this contract...'
- 'The maximum provision for incidental expenditure for this contract is EUR 2,000.00'

In light of the above, please can you kindly confirm that the experts' normal place of posting is 'home-based'?



In light of the above, the provision of EUR 2,000.00 is insufficient with respect to:

- the number of countries to visit (UfM secretariat at least four times, plus Eastern and Southern Mediterranean countries);
- the costs incurred to undertake these visits (travel+per diem)
- the number of experts (two).

Please can you therefore increase the provision for incidental expenditure with regards to the envisaged travel and subsistence costs alluded to in the Terms of Reference?

Answer: The normal place of posting shall be at the contractor's home office.

Two missions during phase 1 (2020) are foreseen, where the contractor will be required to visit the UfM Secretariat headquarters in Barcelona in order to discuss the work plan, questionnaires, consultation strategy and missions (1st mission) and to attend the coordination meeting of the UfM Energy Platforms in November 2020 (2nd mission), in accordance with section 5.1 and 4.7 of the terms of reference. The incidental expenditure should cover these travels required during phase 1 (to the UfM headquarters), in accordance with section 6.5 of the terms of reference. The maximum provision for incidental expenditure during phase 1 is EUR 2,000.00 in accordance with section 6.5 of the terms of reference.

The second phase of the contract (2021) will consist in the realisation by the full expert team of those specific actions as defined in the work plan and logframe in the first phase. The quoted price in a tenderer's financial offer must be a fixed amount for Phase 2, which includes all charges. As a result, any fees, any travel, accommodation and subsistence expenses must be included in the global price offered by a tenderer.

Question 3: Global price and fee-based contract. Please can you kindly clarify which part of the evaluation is global price and which part fee-based?

Answer: The nature of the contract is a mixed contract: Fee-based component and global price component, as specified in section 6 of the contract notice.

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid in Part C3 Evaluation grid - Global price v2019.0 of this tender dossier. No other award criteria will be used. Please see Instructions to tenderers point 12 for further details on the evaluation procedure.

Question 4: Expenditure verification. As per EC rules, we understand that the global price part of the contract will not be subject to expenditure verification. Please kindly confirm?

Answer: Your understanding is correct, Global price component (Phase 2) will not be subject to expenditure verification



REQUEST FOR CLARIFICATIONS Nr. 3 (Mon 03/08/2020 19:04)

Question 5: The Annexes listed to the ToRs in Section 8 of the ToRs are not on the shared folder, will we receive them only in case of contract award?

Answer: All annexes listed in Section 8 of the ToRs 8 will be made available from the signature of the contract.

Question 6: Section 4.7 of the ToRs: Could you please confirm that in case travel restrictions to Barcelona remain, the tentative missions to the UfM Secretariat headquarters could be held remotely?

Answer: The tentative meetings to the UfM Secretariat headquarters may be hold online in case travels' restriction are still in place. Online meetings/workshops are not an acceptable alternative under normal conditions.

Question 7: Section 4.7 of the ToRs: How many country visits should be considered by the tenderers for their financial offer? In case of travel restrictions, will these visits/interviews be maintained and held remotely?

Answer: There is no definition of the minimum number of countries to visit in the terms of reference. The selection of countries may be proposed in the methodology. The costs of the missions in second phase of the contract (2021) should be accounted for in the tenderer's financial offer (see answer to question 2). Until the issues with Covid-19 are resolved all meetings will be virtual (videoconferences) (Please see answer to question 6).

Question 8: Section 6.5 of the ToRs: Could you please confirm Per diem allowances are part of the overall incidental expenditure budget?

Answer: Yes, per diems are an incidental expenditure and are part of the overall incidental expenditure budget in accordance with section 6.5 of the terms of reference.

Question 9: Section 4.1 (1) a) of the Instructions to Tenderers (Experts working on EU projects): How do you define EU/EDF-financed project, and Key expert in the frame of this exclusion clause? Would it be allowed for a support expert to work for a limited period of time (1-2 months) in parallel on a study for the European Commission (i.e. service contract with the European Commission for a study), provided the workload is compatible with his/her tasks within this evaluation? A statement proving this compatibility could be issued, if required by the UfM (please kindly let us know if needed).

Answer: It is possible for an expert to be working part-time on another EU/EDF-financed project and there is not a minimum number of days for the experts. However, please carefully read the Statement of Exclusivity and Availability in Annex D and the details set out in the Instructions to Tenderers point 4.3 (1) a).



Question 10: Section 4.1 (3) of the Instructions to Tenderers (Experts subject to evaluation) Could you please specify which criterion from the evaluation grid (Part C) addresses the CVs of the key experts? In case of several support experts, how are the CVs for this position assessed (e.g. average score, overall skills...?)

Answer: The assessment of key experts' profiles is part of the strategy.

Question 11: Section 4.2 of the Instructions to Tenderers (Financial offer). As per NOTE #3 of the excel template, is it possible to include in the Financial offer an Expert who is not defined as instrumental in the Terms of Reference (ie. an additional row "Non key experts"), or should his/her time be included in the indicated categories (i.e. Senior / Junior expert)?

Answer: The profiles as per Model Financial (Annex V) are meant for a uniform evaluation amongst the different tenders. It is therefore not permitted to add profiles.

REQUEST FOR CLARIFICATIONS Nr. 4 (dated Fri 07/08/2020 15:47)

Question 12: Section 4.1 (5) Technical capacity: Are invited tenderers allowed to present project references of a subsidiary company (in this case 85% participated company, part of the same group)? If not, could you please indicate how to formally include this possibility?

Answer: Although not a subcontractor, the entity on whose capacities the tenderer relies for the fulfilment of technical selection criteria shall produce a statement that proves to the contracting authority that the tenderer will have at its disposal the resources necessary for the performance of the contract (Please see section 19 of the service contract notice)

REQUEST FOR CLARIFICATIONS Nr. 5 (dated Mon 10/08/2020 16:32)

Question 13: Invitation to tenderers Section 4.2 (Financial offer) - On Annex V to the TOR (excel file), the Provision for incidental expenditure is allocated to Phase 1 (2020). Could you please confirm this provision covers also the Phase 2 of the assignment (e.g., travelling costs for the tentative missions identified in the TOR) or indicate the amount of the provision for 2021? The worksheet "working days" is also only showing 2020, could you please confirm tenderers are expected to include in this worksheet the monthly nr. of work-days per expert also for Phase 2 (2021)?

Answer: The eligible costs under the incidental budget are defined under the section 6.5 of the Terms of reference and can be used to cover travel costs and subsistence allowances for missions, outside the normal place of posting, undertaken as part of this contract, during phase 1 (2020) of the contract.

Any travel, accommodation and subsistence expenses during the second phase of the contract (2021) must be included in the global price component offered by the tenderer.



REQUEST FOR CLARIFICATIONS Nr. 6 (dated Thu 13/08/2020 10:41)

Question 14: TOR Section 4.1 (3) (Experts subject to evaluation). TOR indicates tenderers must propose at least one Support expert, suggesting it is possible to propose several support experts. However, the Check list of the tender documents indicates "The CVs of the experts. Each CV must be confined to 5 pages and only one CV should be provided for each position identified in the Terms of Reference". Could you please clarify?

Answer: The technical proposal must provide for this expert position at least 1 expert. Tenderers are allowed to propose more than one expert for each profile. However, all proposed experts should fulfil the minimum requirements set for this profile.

Question 15: (TOR Timeline): On Annex II to the ToRs (Studies v2019.0 2V), the timeline / schedule and the different deliverables for the mission are presented several times:

- A. Section 2.4: Page 12 to 14
- B. Section 4.7: Page 23 to 24
- C. Section 7.2: Page 28 to 30

We would like some information to clarify a few points:

1. Naming and duration of the phases

- In A (Section 2.4), the "phase 1" of the external evaluation report seems to match with the "phase 2.1" of B and C.
- In B (Section 4.7) and C (7.2), the phase 2.1 is scheduled for January 2021 but among the corresponding deliverables, a briefing on work undertaken, and main challenges encountered is placed before the UfM Coordination Meeting in November 2020. Should we consider that the phase 2.1 begins Mid October?

2. Interim reports

- In Section 7.1, only two interims reports are mentioned but in Section 7.2, a third interim report is mentioned for phase 2.2, although the name for this interim report is the same as the one for phase 2.1 ("Interim Report 2").

Could you please confirm that 3 interim reports are due during the project?

- i. End of phase 1
- ii. End of phase 2.1 (January 2021)
- iii. End of phase 2.2 (End of February 2021, Beginning of March 2021)

3. Tentative missions

- When are the tentative missions to SEMED Member States expected to take place? As explained above, the TOR indicate they will take place in January 2021 during phase 2.1, while the duration of this phase is unclear for us
- Four tentative missions to the UfM Secretariat headquarters in Barcelona are mentioned. The fourth one aims to present the findings of the evaluation before the ad-hoc SOM in April according



to Section 4.7. But in Section 7.2, it is mentioned that the consultant has to present the main findings during the first Ad-hoc SOM.

Could you please clarify when is the fourth Tentative mission foreseen?

Answer: Phase 2.1 is performed during 2021.

Your understanding is correct, 3 interim reports are required, as follows: 1) during phase 1 (in 2020, 6 weeks after the start of the implementation), 2) during phase 2.1 (January 2021) and 3) during phase 2.2 (1st week of March 2021).

The tentative missions to SEMED Member States are expected to take place during phase 2 (2021).

Four tentative missions to the UfM Secretariat headquarters in Barcelona are foreseen:

1. the first to discuss the work plan, questionnaires, consultation strategy, and missions during the inception phase
2. The second to attend the coordination meeting of the UfM Energy Platforms in November 2020
3. The third to attend the 4th Annual Meeting of the UfM Energy Platforms in January 2021
4. The fourth to present the findings of the evaluation before the ad-hoc SOM in April, if necessary.

REQUEST FOR CLARIFICATIONS Nr. 7 (dated Mon 17/08/2020 13:03)

Question 16: Would the UfM provide a list of key stakeholders in each country to be interviewed for purposes of data gathering, or is it up to the contractor to identify key institutions, and individuals within those institutions?

Answer: the list of the main stakeholders of each platform will be provided from the signature of the contract the awarded tenderer.

Question 17: Would the UfM write the contractor an official letter endorsing the contracted work so that this letter can be sent to the stakeholders?

Answer: Once the selection process is finished, all tenderers will be notified about the result of this call for tender. Then a contract with the successful tenderer will be signed after confirmation of the availability of their key-experts within 5 days from the date of the notification of award. In addition, the corresponding service contract award notice will be published on the UfM Secretariat website, once the contract is signed with the awarded tenderer.

Question 18: Is an external expenditure verification mandatory?

Answer: Yes, all invoices for phase 1 (Fee-based component) must be accompanied by an expenditure verification report and need to be audited by an external auditor before they are submitted to the UfM (in accordance with article 28 of the General Conditions). Please see answer to question 4.