ENERGISE

EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY

Call for tenders

in

GreenDependent Institute Nonprofit Ltd's

"EUROPEAN NETWORK FOR RESEARCH, GOOD PRACTICE AND INNOVATION FOR SUSTAINABLE ENERGY"

ENERGISE PROJECT

(Grant Agreement No: H2020/727642)

TO DESIGN AND DEVELOP

AN ONLINE MONITORING PLATFORM

Procurement process

15th February 2018

Validated by:

Kristóf Vadovics
Executive Director
GreenDependent Institute Nonprofit Ltd.

This project has received funding from the European Union's Horizon 2020 Research and Innovation programme under Grant Agreement No 727642.

1. Introduction

GreenDependent Institute Nonprofit Ltd (GDI) publishes a call for tenders for the services and tasks defined in chapter 2.3 of the present call.

The tendering is done for the ENERGISE project (Grant Agreement No: H2020/727642) and it will be managed by GreenDependent Institute Nonprofit Ltd, which is a partner organisation of the above project and responsible for its Communication and Dissemination Work Package (WP7).

1.1. Role and function of the Online Monitoring Platform in the ENERGISE project

Between September 2018 and March 2019, the ENERGISE project will roll-out energy efficiency initiatives among 320 private households in eight different European countries (two groups of 20 households per country). Throughout the entire run-time of these initiatives, the Online Monitoring Platform (to be developed) will be in-use in eight different countries. The platform will function as the main interface and on-line portal for four different user groups involved in the energy initiatives (ENERGISE admins, ENERGISE project partners, local implementers and participating households). Crucially, the platform will enable the collection and storage of quantitative (numerical) and qualitative (text-based) data and provide graphic feedback on energy use to participating households.

This Call for Tender specifies individual tasks and technical requirements pertaining to the Online Monitroing Platform to be developed by the winning and contracted Applicant, in collaboration with GreenDependent Institute (GDI) and Maastricht University (UM).

2. Information for submission

2.1. Contracting Entity

GreenDependent Institute Nonprofit Ltd

Central Business Register:	13-09-147893
Tax number:	HU23393862
Established at:	Éva u. 4, Gödöllő, 2100, Hungary
Represented by:	Kristóf Vadovics, Executive Director

2.2. Definition of Contract

The Contracting Entity will sign an assignment contract (henceforth: Contract) with the winning Applicant after closing the tendering process.

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2.3. Object of the tender

The object of the tender is the ***design and development of an Online Monitoring Platform*** (in the framework of Work Package 4 led by Maastricht University - http://www.energise-project.eu/work-packages) to be linked to the official, already existing national websites of the ENERGISE project.

Accordingly, the Contracting Entity would like to receive tenders for the implementation of the following tasks and services:

1. Developing an Online Monitoring Platform (according to the technical requirements outlined in Annex 2);
2. Co-developing the design and content of the user interface with responsible project partners of the ENERGISE consortium, UM and GDI);
3. Testing the Online Monitoring Platform together with project partners of the ENERGISE consortium;
4. Linking the Online Monitoring Platform to the existing eight national project websites;
5. Providing easy-to-use user manuals and (on-line) training on the use and management of the Online Monitoring Platform to the ENERGISE consortium;
6. Providing continuous maintenance support (correction of bugs, errors, etc.).

Further details on the technical requirements to be fulfilled can be found in Annex 2.

Applicants will be asked to prepare brief **periodic reports about their activities and their outcomes**. These will need to be submitted to GreenDependent Institute and Maastricht University and will constitute criteria for acceptance of task completion and delivery, and the payment of invoices.

2.4. Timeframe

The ENERGISE project runs between 1 December 2016 and 30 November 2019.

Tasks and services in the framework of the present tender shall be conducted between March 2018 and March 2019. Please see Annex 3 for details.

2.5. Financial aspects

The project has a maximum budget for the completion of activities in the framework of the present tender.

Applicants must bear in mind that the subcontracting cost for the above tasks shall ***include VAT*** and ***all other costs*** (personnel, direct, travel, overhead, etc.) related to the services and tasks to be completed.

The financial plan (budget) submitted by Applicants should contain comprehensible details related to the planned budget items.

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2.6. Additional requirements

To ensure smooth collaboration:

1. Employees of the winning Applicant working on the development of the Online Monitoring Platform are required to be proficient in English as it is the official language of the ENERGISE project.
2. A brief work and communication plan needs to be submitted with the Contracting Entity (e.g. work flow, feedback cycles during development, details of response time for correcting problems with the database, etc.).

Applicants should submit proof of satisfying the above requirements (e.g. in the form of references, details in experts' CVs and a comprehensive work and communication plan).

2.7. Contracting conditions

The Contracting Entity can accept invoices from the supplier only after issuing a written performance certificate based on the performance of the Contractee. Upon 30 days from the arrival of the invoice it is paid by the Contracting Entity.

If required there is a possibility for payments in several instalments based on performance. Applicants should indicate and provide reasoning in their proposals if they wish to take advantage of this opportunity.

Applications can be made by a single organization, or a consortium of organizations. However, in case of a consortium, the consortium leader shall be responsible for all communications with the Contracting Entity, and this should be marked clearly in the application.

2.8. Deadline and contact for submitting the tender

The tenders must be sent to the following address via email

kristof@greendependent.org
Kristóf Vadovics
Executive Director
GreenDependent Institute

Deadline for submitting tenders: **24:00 CET on 15 March 2018**, but the **Contracting Entity should be notified** at the above email address until **17:00 CET on 28 February 2018** the latest about the intention of submitting a tender.

Tenders should be submitted in ***pdf*** format until the above deadline.

Tenders arriving after the deadline will be considered invalid.

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2.9. Causes for exclusion

Applications will not be considered if the applicants are in any of the following situations:

a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities;
b) they have public law debt;
c) they approach project partners for information concerning this present tender differently than prescribed in point 4.1.

Applicants must submit an official statement indicating that the above situations a) and b) are not relevant to them.

2.10. Evaluation of tenders

The Contracting Entity will examine the tenders to assess if they comply with the formal and content requirements of the call, if they contain financial mistakes and if they can be considered complex, possessing all the necessary appendices.

Before conducting a thorough evaluation, the Contracting Entity assesses if there are any excluding causes for the tenders.

After that the Contracting Entity establishes which tenders are valid and ready for the detailed evaluation.

A tender is not valid if

a) it is submitted after the deadline,
b) there are excluding causes in connection to the bidders,
c) the bidding organisation does not comply with the requirements defined in the present call.

Only the valid tenders will be evaluated by the Contracting Entity. Evaluation will be based on:

(1) satisfying additional requirements listed in 2.6;

(2) satisfying technical requirements listed in Annex 2;

(3) best value for cost.

The Contracting Entity will sign a contract only with the legal representative of the overall best Applicant.

The Contracting Entity reserves the right to reject all tenders, and thus declaring the tendering process unsuccessful if none of the submitted tenders fulfils all requirements.

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If a tender contains unreasonably low pricing, the Contracting Entity is entitled to request further details or justification from the applicant. The Contracting Entity reserves the right not to accept an offer if it cannot be accepted or can be considered as irrational from an economic point of view.

3. Requirements in connection with the tender and the Applicant

3.1. General rules

The proposal must address all technical and management-related requirements of the call, partial proposals will not be considered.

3.2. Content and structure of the tender

The tender must contain the following documents in the order described below (please adhere to the following order when compiling the tender):

- Table of Contents
- Basic data of the Applicant (Annex 1);
- Statement/Proof in connection to cases mentioned in 2.9;
- Proposal for conducting the tasks and services specified under 2.3, including:
    - suggestion and brief description of the methodology to be used;
    - a time plan for conducting the tasks and services including suggested deadlines for periodic reports;
    - a work and communication plan detailing moments of feedback and testing with the ENERGISE consortium;
    - a detailed budget with explanation where necessary.
- References
    - Relating to the experience of the applying organization, including specific examples of similar or comparable projects completed;
    - CVs (following the Europass format and including language skills) of the experts to be involved in the activities.
- Filled in *ENERGISE Online Monitoring Tool technical requirements* document (Annex 2)

3.3. Formal requirements for the tender

- The tender must be submitted ***in the English language***,
- in ***pdf format***, and
- must be ***signed by the legal representative*** of the Applicant.

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4. Other information

4.1. Contact information

All enquiries in connection to the **technical content and design requirements** of the call shall be made in writing **no later than 17:00 CET 8 March 2018** to the following address:

j.backhaus@maastrichtuniversity.nl
Backhaus Julia
Doctoral Researcher
Maastricht University – leader of WP4 of the ENERGISE project

All other enquiries in connection to the **administrative part** of the call shall be made in writing **no later than 17:00 CET 8 March 2018** to the following address:

kristof@greendependent.org
Kristóf Vadovics
Executive Director
GreenDependent Institute – leader of WP7 of the ENERGISE project

Responses to all questions received will be sent to all Applicants and will also be made public on the project website (www.energise-project.eu).

Any attempt by any applicants to influence the Contracting Entity or any of their employees in the selection process will result in the immediate exclusion from the tendering process.

4.2. Opening the tenders

The opening of the tenders will not take place at a public event.

4.3. Negotiation

The Contracting Entity may initiate a negotiation process with the winning Applicant if some parts of the tender need further clarification.

4.4. Announcement of tender result

Every Applicant will be informed of the result of the tender by the Contracting Entity after selecting the winner, **not later than 15 April 2018**.

4.5. Risks of the Applicant

The Contracting Entity declares that every Applicant enters the tendering process on its own risk, and all costs occurring in connection to the tender must be borne by the Applicant. The Contracting Entity cannot be made accountable for these costs and risks.

4.6. Subcontracting

The Applicants will be allowed to involve subcontractors in the contracted services to be performed.

All subcontractors have to be mentioned in the application and it has to be made transparent which services are provided by subcontractors.

In case the Applicant wishes to involve a new subcontractor after signing the Service Contract, the Contracting Entity has to be notified beforehand. A new subcontractor can only be involved with the approval of the Contracting Entity.

4.7. Reservation of rights

The Contracting Entity reserves the right to

- declare the tendering process unsuccessful in case of unfavourable tenders and close the process without any justification or signing a contract with anyone;
- withdraw the Call and its documents before the deadline for submission without any explanation and not bearing any responsibility towards the Applicants. The Tender Manager is to notify all the Applicants in such a case;
- select the best offer from every perspective from the Contracting Entity's point of view.

In case the winning Applicant withdraws from the process, the Contracting Entity reserves the right to start negotiations with the second-best offer and sign the Contract with its legal representative.

In case the Contract cannot be signed with the winning Applicant within 15 days after the announcement of the winner due to reasons arising on the Applicant's side, the Contracting Entity reserves the right to enter into negotiations with the second-best offer and sign the Contract with its legal representative.

As a general rule the governing law of the tendering and contracting process is the Hungarian legislation.

The Applicants understand that announcement of the winner of the tendering process does not automatically initiate a contractual relationship between the Contracting Entity and the winning Applicant, which is only established by signing the Contract.

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Annexes

Annex 1

DATASHEET

Company name:	
Address:	
Postal address:	
Represented by:	
Contact person:	
Contact person phone number:	
Contact person email address:	
VAT no:	
Bank account number:	- -
Name of bank:	
IBAN:	
SWIFT:	
Company ID/registration number:	
Name of legal representative:	

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Annex 2

Description of the tasks of the present call to be conducted in the ENEGISE project

1. Developing an Online Monitoring Platform (see technical requirements below);
2. Co-developing the design and content of the user interface with project partners of the ENERGISE consortium responsible for its development (UM and GDI);
3. Testing the Online Monitoring Platform together with project partners of the ENERGISE consortium;
4. Linking the Online Monitoring Platform to the existing eight national project websites;
   i. http://ireland.energise-project.eu
   ii. http://uk.energise-project.eu
   iii. http://denmark.energise-project.eu
   iv. http://germany.energise-project.eu
   v. http://switzerland.energise-project.eu
   vi. http://finland.energise-project.eu
   vii. http://energise-lab.nl
   viii. http://energise.hu
5. Providing easy-to-use user manuals and (on-line) training on the updating/management of the Online Monitoring Platform to the ENERGISE consortium;
6. Providing continuous maintenance support (correction of bugs, errors, etc.).

ENERGISE Online Monitoring Platform technical requirements

Priority levels set by Contracting Entity:

1. Mandatory; 2. Strongly suggested; 3. Optional but recommended

Numbers for insertion by Applicant (one number per row only):

[Blank]	**Cannot be actualized**
1	**Built-in**
2	**Tailored / customized**
3	**Other, see comments**

Instructions: The Applicant fills in the appropriate number next to each item. Anything else in this document must not be altered. Any blank items with priority “1” will lead to rejection of the Applicant. All comments must be provided on a separate page, indicating the item number on which the Applicant wishes to comment. All items regardless of the number

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inserted by the Applicant can be commented on if the Applicant wishes to do so. Items can also be referred to in the Applicant's work and communication plan. Any comment on priority "1" item that suggests weakening of the stated requirement will lead to rejection of the Applicant. Except for blanks, the evaluation of a tender will not be based on the responses filled in by the Applicant. However, assigned numbers will be used when evaluating the Applicant's ability to fulfill its proposed work and communication plan.

The filled in *ENERGISE Online Monitoring Tool technical requirements* document is to be provided as a part of the tender documentation.

GENERAL

No.	Feature description	Priority	Applicant's response
1	The system can handle 400 simultaneous users browsing and filling in forms.	1	
2	The system provides security features protecting the inserted data and providing password-protected user accounts to all users.	1	
3	The system allows logging in with Gmail or facebook user account data.	3	
4	The system makes use of a single database that is accessible in eight different countries in eight different languages.		
5	Four different user privilege levels, each with their own web page and control interface. All levels are easy to use. They are intended to be following: (1) Admin level (app. 5 users): Admins can add and modify forms (for survey questionnaires). They also have access to all the data in anonymised form (without identification of households). At least 5 admins are to be designated. (2) ENERGISE project partner level (app. 40 users): project partners can create and modify forms, add data (e.g. observations, interviews), enter free text (where this is facilitated), can access all data of their own country (not anonymised) and all data of other countries (anonymised). (3) Local support level (app. 30 users): Implementing partners can input data (e.g. observations, interviews) and can access data of their own country (not anonymised). (4) Household level (app. 320 users): households can input data, access their own data and (graphic) summaries of their own data.	1	

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6	Each user (household) can be flagged with predefined and freely chosen attributes, e.g. Activity status (1. active, 2. resigned)	1	
7	Easy-to-use instruction manual for all user levels	1	
8	Search function	1	
9	The system automatically transfers the user to the right language interface by location or web site address.		
10	The system collects and provides statistics that include loaded but unfilled forms, time spent filling in forms and all other usage.	1	
11	The system logs user actions, e.g. when a form or a page is created/modified or the database is accessed, exported or modified.	1	
12	The system fully supports special characters that can be added by the site / form creators and users filling in forms. The text entered into forms is stored keeping the characters correct.	1	
13	The system is able to send e-mail and text messages with automation and custom-timing features.	1	
14	The web address is simple.	1	
15	The system is based on readily available platform.	2	

INFORMATION COLLECTING

No.	Feature description	Priority	Applicant's response
16	Easy-to-use form creating tool that supports free-text fields, selectable items and semi-free fields (e.g. user-inserted temperature allowing range 15-30°C).	1	
17	Size of the form items is customizable (e.g. size of a free field).	1	
18	User instructions for filling in forms can be inserted on any part of the form.	1	
19	The collected data is organized in a database that provides structured access.	1	
20	The form provides saving feature to allow the user to continue filling in the form at a later date/time.	2	
21	Once a filled-in form is submitted, only ENERGISE partner level users can change the data.	2	
22	Form creators can set forms to be automatically published on specified date and time.	1	
23	Form templates can be saved.	1	
24	A personal link or invitation to the form can be sent to e-mail addresses and mobile phones with accompanying, explanatory text. The system tracks which households have responded and sends automatic reminders to those who have not.		
25	The system supports browser-based and mobile (app or mobile-compliant web UI) responses and can link received data to correct household.	1	

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26	The system supports the following ways to insert data: (1) Pre-entered data, fed in by ENERGISE partners (directly and uploading from xls-files). (2) Data to be entered by participating households. These are collected via automated form-based surveys via the online monitoring platform. (3) Data to be entered by ENERGISE partners and local implementing partners. These data include interview and survey questionnaire responses, which are entered directly during or after the interviews with households. The interviews and surveys are rendered in English, French, German, Hungarian, Dutch, Danish, Irish and Finnish and need to be attributable to specific households. (4) Data from logging devices can be uploaded in csv or xls-format and attributed to specific households.	1	
27	The form creation and management tool is based on readily available software.	3	
28	Data from household interviews (conducted by ENERGISE partners) can be inserted/uploaded as free text and connected properly to the household that provided the data.	1	
29	Questionnaire forms support eight languages so that there is no need to create all of them separately. ENERGISE partners can translate the original English form into their own national language.	1	
30	Data collected via paper-based surveys can be manually inserted into the system and connected to the specific household that provided the data.	1	

THE MOBILE SYSTEM AND USER INTERFACE

No.	Feature description	Priority	Applicant's response
31	The system provides a web interface for all user levels, all of the web pages being different depending on user privilege.	1	
32	The web interface provides customizable web pages (e.g. welcome and instruction page) but the forms and other pages require login with password to be accessed.	1	
33	Forms and web pages are designed to be visually elegant according to the ENERGISE project identity guide (to be made available by ENERGISE partners) and retain their formatting and functionality on all of the most common mobile/stationary	1	

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	devices and browsers.		
34	Easy-to-use web site editor.	1	
35	Customizable web site structure.	1	
36	The interface provides eight language versions. The system automatically transfers the user to the right language interface by location or web site address.	1	
37	The web pages can be updated and modified even after roll-out of the system.	1	
38	The system provides a mobile interface that is easy to use and has a fast response time.	1	
39	The mobile system scales items automatically to fit the screens of mobile devices. No horizontal scrolling is allowed.	1	
40	The mobile system works on Android, iPhone and Windows Phone–platforms.	1	
41	The login information can be saved so that users do not need to enter password every time they log in.	2	
42	The primary way to actualize the mobile interface is a mobile-compliant web page instead of a dedicated app.	3	
43	Should the mobile system be built as a phone app, the contractor is responsible for the qualification process to Apple, Google and Windows mobile store.	2	
44	The mobile system shows the same forms as the web interface. If no separate mobile version of a form or web page is created, the system automatically scales the form / page to fit the screen properly.	1	
45	The user interface (both mobile and web) allows viewing previously sent forms and personal summary/progress reports.	1	
46	The household web page includes graphic feedback on household progress. The graphic feedback is automatically calculated based on household responses provided in forms and pre-entered formulas (*see section "Information processing"*).	1	

INTEGRATIONS

No.	Feature description	Priority	Applicant's response
47	The system has e-mail and text message sending capability.	1	
48	The logger data can be uploaded as csv or xls-files and properly stored in the database, clearly linked to the household where it was attained.	1	
49	All data is exportable to Microsoft Excel. The data to be exported can be searched/filtered and selected (e.g. all logged temperature data in DK or all survey data from FI and HU).	1	
50	User contact information can be managed in Excel by exporting and importing correct file.	1	

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INFORMATION PROCESSING

No.	Feature description	Priority	Applicant's response
51	The platform includes pre-entered data and calculation formulae (provided by the ENERGISE partners) for producing data and graphs of (changes in) household energy and electricity use. For example, the formula to assess energy use will consist of temperature corrections based on weather data and other variables. The formulae will be household- or country-specific.	1	
52	The household web page includes graphic feedback on their progress. This feedback is based on values provided by households via weekly forms (e.g. number of laundry wash cycles) and formulae (e.g. to show energy use for heating).	1	
53	Calculation formulae to generate household feedback can be managed by user admins.	1	
54	The system is able to collect weather data from a pre-specified reliable source (e.g. a web page).	1	
55	Managing formulae can be done by user admins via upload from xls-file. The input data can be collected automatically (e.g. weather data), retrieved from the database (e.g. households' survey answers) and uploaded from xls-files (e.g. country-specific variables).	2	
56	The system provides straight integration to Microsoft Excel. Correctly structured database can be viewed and modified (e.g. add or modify calculating formulae).	3	

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Annex 3

Timing and Deadlines of Tasks

1. Beta version of the Online Monitoring Platform needs to be ready by 15 May 2018.
2. Linking the Online Monitoring Platform to the existing national project websites must be finalized by 15 June 2018.
3. Testing the form feature for data collection via the Online Monitoring Platform must be ready by 15 June 2018.
4. Provision of easy-to-use user manuals and training project partners on the management of the form feature of the Online Monitoring Platform shall be done by 15 June 2018.
5. Testing the built-in calculation feature for graphic feedback to households must be ready by 31 July 2018.
6. Provision of continuous maintenance support until 31 March 2019.

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