



## INVITATION FOR A TENDER

Multi-sided Online Platform for stimulation and growth of energy savings for dwellings

<b>Date Published:</b>	<b>2<sup>nd</sup> March 2021</b>	
<b>Deadline for Submission:</b>	<b>24<sup>th</sup> March 2021</b>	<b>At 08:00 pm CET</b>
<b>Tender Opening:</b>	<b>2<sup>nd</sup> March 2021</b>	<b>At 08:00 pm CET</b>

This invitation for a tender seeks to outline the main criteria and requirements put forward by Ekubirojs in its capacity of the Employer to assign the design, creation and maintenance of an online platform for the use of multiple stakeholders seeking to implement energy efficiency measures.

## Opening letter

From

**Funding for Future B.V.**

Reg. No. 853870317

VAT No. NL853870317B01

Address: Stetweg 43b, 1901 JD Castricum, The Netherlands

Dear Sir/Madam,

With the current we inform you of the opening of a tender procedure to select an assignee to execute an enhancement of a multi-side online platform (“**MSP**” or the “**Platform**”). The Platform is designed to bring together all stakeholders in the process of implementation of a deep renovation driven by energy efficiency measures. The enhancement creates the interface between a building owner/resident by delivering a “user journey” to closure of a transaction. You are kindly invited to qualify for the tender on the Platform modification.

If you request any clarification to the tender requirements and documents made currently available, such a request must be sent via e-mail to the following email [admin@fcubed.eu](mailto:admin@fcubed.eu).

We may reply in writing or via e-mail to any reasonable request for clarification. If we, either on our own initiative or in response to a request from a Tenderer, provide additional information upon request, such information shall be incorporated in the tender document as published and made available to all Tenderers at the same time.

Any costs incurred by the Tenderer in preparing and submitting the tender proposals are for the tenant's own account of the Tenderer.

**We look forward to your tender proposals. All participants in this tender shall be informed via e-mail of the final outcome of the tender.**

Applications for participation in this Tender should be received on the email [admin@fcubed.eu](mailto:admin@fcubed.eu) before the deadline **24<sup>th</sup> March, 2021**.

Yours faithfully,

Nicholas Stancioff

**This work subject to assignment under this tender is funded by the European Commission under the Framework program for Research and Innovation – Horizon 2020**



**F3 has the right to accept or to reject any Tender Document and/or to cancel the whole tender process and to reject all Tender Documents. We may do so at any time before awarding the Contract and have no liabilities to the Applicants.**

**We are not liable to select the lowest price and may change any condition in the tender procedure with no consequences.**

**After the opening of the Tender Documents, we shall not reveal any information or the successful Applicants to any third parties with regard to the review, evaluation, clarification comparison and evaluation of Tender documents or decisions connected to the Contract award.**

**We have the right to reject any Applicant without clarifying the reasons for that, as well as to reject any Applicant who presented untrue, fraudulent or misleading information.**

## 1. Terminology

<b>BEEF</b>	Building Energy Efficiency Facility. The BEEFs are funds created to facilitate long-term investments necessary for multifamily building and public building renovation projects.
<b>BEEF Business Model</b>	Deep Renovations financed by Long Term Energy Savings by aligning value chain through standardization and constant innovation, thus increasing scale and decreasing costs and risks to owners and investors. The BEEF Business Model aims to scale up "Guaranteed Safety, Health, Well-being" Renovations to owners/occupants of buildings built in series.
<b>BEEF Guidelines</b>	The rules approved by the supervisory body of the Building Energy Efficiency Facility, the "BEEF" of each partner country, define the minimum standards that a project has to comply with to apply for forfaising.
<b>Contract</b>	The assignment agreement to be concluded upon completion of this tender procedure with the selected applicant for the execution of the scope of works to be specified in greater details therein.
<b>Documentation</b>	The written, printed or otherwise recorded or stored (digital or paper) material relating to the Platform and the Source Code, including technical specifications and instructions for its use including Source Code annotations and other descriptions of the principles of operation of the Source Code and Tools and detailed and comprehensible instructions for its use.
<b>Ekubirojs</b>	Ēku saglabāšanas un energotaupības birojs, Registration number 40008198558, EUROPA projectpartner responsible for managing the SUNSHINE Platform. Ekubirojs will collaborate closely with the winning applicant on the development described on this tender.
<b>Employer</b>	The legal entity in charge of assigning the current tender, its conduct and selection of a tenderer to procure and commission the assigned work, which is F3.
<b>F3</b>	,Funding for Future B.V., , a company incorporated and operating under Dutch legislation, registered in the Commercial Register under Reg. No. 853870317 and VAT No: NL853870317B01, having its seat and registered address at Stetweg 43b, 1901 JD Castricum, The Netherlands or any other third party having been assigned by the latter in full or partially with any of the rights or obligations under the Agreement.
<b>EPC</b>	Energy Performance Contract pursuant to which implementation of energy efficiency measures in multi-family dwellings or public buildings is pursued.
<b>EES</b>	Energy Efficiency Subscription
<b>Fund</b>	Investment management fund that invests in long-term renovations of MFBs. See <a href="http://fcubed.eu/">http://fcubed.eu/</a> for more information.
<b>MSP</b>	Multi-stakeholder platform, further referred to as the "SUNSHINE Platform" is the information system to support all phases and actors involved in an EPC project and the creation of which is the scope of works of this tender
<b>MFB</b>	Multi-family building

<b>Platform</b>	The Information System supporting all phases and actors of an EPC project and whose further development is subject to the current tender
<b>Source Code</b>	The computer programming source code form of the software used for the execution of the Work assigned under the Contract to be concluded pursuant to this Tender, and including all non-third-party executables, libraries, components, and Documentation (as defined above) created or used in the creation, development, maintenance, and support of Single ID Plugin as well as all updates, error corrections and revisions thereto.
<b>Tenderer</b>	Any company that meets the requirements and criteria as defined further hereinbelow and which is free to participate in the current tender procedure by submitting all relevant and requested documents in the envisioned deadlines

## 2. Scope of works

### 2.1 High level overview of EUROPA project and the One-Stop-Shop in development under it

This procurement procedure is conducted as an open tender by Funding for Future B.V. “F3” for the purposes of assigning the execution of the following scope of services to the SUNSHINE platform for the H2020 EUROPA project.

The concept of deep renovation and Near-zero energy building has been introduced recently in energy regulations and policies and it should become the standard for the building renovation both for public and private buildings. In the EU, up to 40% of energy consumption is used in the building sector and the most of it by private households. Energy-efficient buildings represent a key lever for achieving environmental policy objectives. This focus must be widened and aimed to tap into the enormous potential offered by existing building stock. The rate of energy refurbishment is still too low across Europe and in the regions involved it is at the EU average (about 1-1,5%). Only 10% or lower is going in the direction of deep renovation. This rate must increase in the years to come.

In the countries involved in the project, some interesting incentives schemes are already in practice that are promoting deep renovation. These are grants, tax deduction, soft loans, white certificates, etc. Besides, a good commitment for the energy transition is also recognized by the governmental institutions. This is creating a positive framework for deep renovation and the market is developing. This is good, but it is not enough. There is still reticence from the market operators to take a risk of performance and this is perceived as a barrier in the market. The business model of a number of actors only focuses on low hanging fruit: basic energy efficiency measures or renewables to lower the CO2 footprint of the building. Besides, the offer that comes to end users for deep renovation is nowadays mainly tailored as a commercial offer and no attention is paid to the real impact of the measures. No verification or contractual guarantee is introduced. There is, thus, a need for coordination and support action and the project is really focusing on that, providing technical assistance and introducing higher standards and guarantees in the market with internationally recognized protocols for measurement and verification.

The EUROPA project is developing an Energy Efficiency Subscription (“EES”) model supporting the players –

ESCOs (Energy Service Companies), banks, facility managers or other representatives of owners associations - in the correct activation of investments for deep renovations of private multi-occupancy buildings towards nearly zero-energy buildings (NZEb) standards. The project is setting up actions for the activation of demand and trust among final users, implemented with a one-stop approach that will be tailored to specific regions.

The EES will include:

- A list of subscribers (ESCOs and market operators which endorse the subscription)
- Reviews of products/technologies according to a set of indicators (value for money, speed of application, eco-certification, etc.)
- Reviews of subcontractors, including certifications of skills and competences;
- Model contracts for the implementation of energy-efficiency measures;
- Performance measurement and validation plans
- Financing schemes balanced with respect to the distribution of expenses and risk (e.g. higher capital requirement and higher risk in a short timeline during the works; lower risk and steady expenditure during management phase)

The ESS subscription will be delivered through the SUNSHINE platform and other documents and tools to be developed during the EUROPA project. The upgraded platform and related documents and tools will be used:

- as a marketing tool: the ESCOs adopting the best practice contract will have a commercial advantage being seen by the clients as honest, transparent and delivering benefits coming from energy efficiency;
- as tools to check the validity and efficacy of the energy efficiency activities by the occupants of buildings and their representatives, the weakest link in the commercial operations;
- for credit applications: access to bank financing by the ESCOs will be granted on the basis of such a contract as the lenders would be able to evaluate the credit applications from a quality perspective also.

The establishment of such one-stop shops is one of the possible indicators and milestones advised for Member States in the Annex of the Commission Recommendation (EU) 2019/786 of 8 May 2019 on building renovation, hence it is likely to receive wide support.

## 2.2 SUNSHINE platform current development

The Platform brings together several stakeholder segments, getting them involved in projects that generate energy savings. The Business Model that the platform supports provides a distinct value proposition to each in order to stimulate their participation:

1. Building owners/tenants benefit from reduced energy bills, improved building quality, decrease of energy poverty and potentially increased property values as a result.
2. The key market operators benefit in different ways:

- Ability to sell to the Fund the energy savings receivables arising from these projects, allowing to renovate more buildings simultaneously due to removal of financial restrictions;
  - The Service provider who renovated the building has a long-term agreement with the building that goes beyond the renovation, to maintain the building in the same conditions as in the commissioning. This guarantees years of service instead of only the months of renovation;
  - Once the construction companies have the possibility to scale through forfeiting, also the suppliers of materials have more buildings to supply for.
  - Building contractors are retained by the service providers to carry out the renovation projects;
  - Suppliers of key construction materials used in the renovation projects provide these materials to the contractors.
3. Financial institutions such as commercial banks and non-bank lenders provide project, bridge and/or working capital loans to the service providers. The forfeiting allows the construction companies to return the loans received from the banks short-term.
  4. Investors finance the purchases of energy savings receivables arising from building renovation projects. The Fund provides to them a green low-risk long-term investment.
  5. National and local governments may provide incentives for various participants in the ecosystem as it helps them implement EU directives and national legislation aimed towards energy efficiency. These projects generate decarbonization of the buildings in large scale, and provide a viable solution for renovating many buildings in an affordable way (based on energy savings), which would not be possible for the local governments due to insufficient funds to solve such a large-scale problem.

A core activity of the Platform is to introduce and oversee standard protocols that underpin all interactions in the ES ecosystem as well as to keep them updated.

The Platform includes instruments and tools for deep energy efficient renovation of multifamily residential buildings (MFB). Service providers will use the platform for developing their energy efficient renovation projects, which will then be ready for forfeiting. Residents of MFBs can use the platform to benchmark and check their own building.

This Platform is developed in such a way as to provide necessary tools (technical, economic and financial) for planning and implementing deep energy efficient renovation projects and will function as a “one stop” online portal, where service providers and residents of MFBs can find all necessary technical, economic and financial information about deep renovation.

The secondary objective is to ensure consistently appropriate scale for such ecosystems so that they can generate sufficient volumes of energy savings receivables that the Fund can invest in as its core financial asset thus further attracting Private Sector funding.

The platform is already available in English, Latvian, German, Polish, Bulgarian, Romanian, Slovakian.

## 2.3 Additional information

For more information, see the document:

[SUNShINE Platform - software description](#)

## 3. Planned Development

### 3.1 Specific deliverables under the tender

The Platform is intended to complement the supporting activities provided by EUROPA partners to the end users which can be also provided vis a vis and with direct contacts. It is also a way to engage additional users that have not been directly met.

The platform will use or reuse as much as possible the structure of the already running SUNSHINE platform, as mentioned above. It will be developed in English and then translated to 4 project partners' languages. The applicant will collaborate to adapt existing visuals, infographics and animations as appropriate as part of -or as reference to- the user journey (sharex.lv).

This tender's development will include:

1. Creation of Frontend onboarding of SUNSHINE platform, consisting of the development of an onboarding process for the clients of SUNSHINE platform, prioritizing Owners/Residents.

This onboarding process should align with welcoming the user, helping the user identify his/her correct needs, walking the user through the journey and ensuring that they meet eligibility criteria to align with the BEEF guidelines, understand the models of renovation, the value of deep renovation and how financing can be met in each pilot region. It should support users to decide which energy saving measures they can implement on their homes

Informing users about how he or she can be a part of such a project in each pilot region, including the standard investment packages that are presented according to the typologies of targeted buildings in each pilot region.

2. Implementation of Eligibility criteria for selection of market operators when implementing energy savings activities:
  - a. The list of subscribers (ESCOs and market operators which endorse the subscription).
  - b. Products eligibility standards (Reviews of products/technologies according to a set of indicators (value for money, speed of application, eco-certification, etc.)
  - c. Reviews of subcontractors, including certifications of skills and competences (level of expertise of craftsmen and professionals)

3. Improvements to the existing frontend of the platform focusing on User interface and User experience. This includes Implementation of “tips for the users” or instructions on how to use the platform, embedding it in the system (not as separate material).

*Supporting materials , such as visuals, videos, etc, is outside of the scope of this tender, and will be provided by F3 and its partners.`*

4. Modifying existing modules:

- Adapt the Contracts Module to include standard contracts for for the partner countries in the EUROPA project - France, Germany, Italy, Portugal
- Include Technical standards for investment package for deep renovations measurement and verification of the performance

The winning applicant will be responsible to co-design the additional modules and changes of the SUNSHINE platform with partners from the consortium, in particular Ekubirojs and F3 to ensure knowledge transfer. This will enable a more defined and detailed user journey and ultimate usability as well as deliverables of easy-to-understand visuals, infographics of the platform. (This will be produced together with Ekubirojs).

The winning applicant will start with a first assessment of the development of the existing SUNSHINE tool drafted in M6 and then a release of a first version of the tool in M12. The tool will be finally adopted along with the project implementation taking into account the outcomes of the pilot implementation in the regions involved in the project.

### 3.2 Timing of the execution of Planned Development (refer to 3.1)

A final timing will be agreed upon with the executor of the tender and F3.

Mapping and Scoping of the project <i>Mapping and understanding of the user journey with F3 and Ekubirojs staff to ensure understanding of all phases and actors of a typical EPC project to implement the project process and support the EUROPA One-Stop-Shop.</i>	Month 1
Assessment of the development of the existing SUNSHINE tool drafted	Month 3
Design and feedback with Ekubrojs and F3	Month 6
User Testing with stakeholders <i>To ensure usability throughout prototyping and development of new modules and frontend, the EUROPA partners will collaborate in the testing of the platform. This task will be coordinated by Ekubirojs and involve up to 10 selected stakeholders per region to ensure usability of the tool.</i>	Month 6 - 8
SUNSHINE platform powered by EUROPA delivered	Month 10

### 3.3 Requirements towards tenderers

The following requirements have to be fulfilled for all developments of the SUNSHINE platform.

- GR1. The platform assists in communicating with residents throughout the entire project.
- GR2. The platform allows residents to benchmark their building.
- GR3. The platform allows service providers to check EPC project feasibility using regression analysis, historical data, Bayesian statistics.
- GR4. The platform allows residents to rate the service provider.
- GR5. Service provider overall rating is calculated based on rating from residents and other EPC project quality metrics.
- GR6. The onboarding process is developed for Owners/Residents.
- GR7. The Products eligibility standards, review of subcontractors, as well as any other categories defined during development, will be created in external tables available for the Super Users to update them without need to involve the system administrators.
- GR8. The tips for users and their translations will be created as a separate module that can be updated by the Super Users without need to involve the system administrators.
- GR9. The Standard Contracts, must be created as an external table, not embedded in the code, to allow for versioning and updates.
- GR10. Reviews of subcontractors, including certifications of skills and competences (level of expertise of craftsmen and professionals)
- GR11. The Source Code of the SUNSHINE Platform and its components is available as open source and can be used or modified by anyone free of charge. Notwithstanding the above, not later than within 3 days upon completion of each of the separate stages of the Platform development an archive (ZIP file) that shall include the Source Code, the entire Project Documentation as well as all other relevant system and program files and appropriate documentation and instructions in English language shall be sent and made available to F3.
- GR12. The Tenderer shall ensure that all intellectual and industrial property rights related to or stemming from the Platform as created by the Tenderer on the basis of a mandate by F3 are automatically transferred to the benefit of F3 without the need for any formal legal acts. In case there are any copyrights and/or related rights to any of the executed work which are owned by the Tenderer and/or by a third party, the Tenderer shall procure that all such rights, save for the ones that are not transferable by law, be transferred to F3.
- GR13. The platform should be easily modifiable to take into account the legal regulations of each country.
- GR14. The platform should contain EPC project performance dataset and mathematical models that can be reused in multiple countries (data from Latvia can be used for decision making in Lithuania and vice versa). The instances of platform shouldn't act as isolated silos but rather exchange with data and share certain services.
- GR15. The platform must correspond to the EU's Data protection directive (see <http://eur-lex.europa.eu/legal-content/en/ALL/?uri=CELEX:31995L0046>)
- GR16. The developed modules will be presented to the regional authority in charge of sustainable energy policies for its official endorsement as a reference and recommended standards for deep renovations. The form and level of endorsement will be adapted to the local context in order to be more effective. The adaptation to the local context is part of the adjustments to be made to the platform during the full length of the project.

- GR17. The platform is available in English, Latvian, Slovak, Romanian, German, Polish and Bulgarian. Under this tender, French, Italian and Portuguese are added.
- GR18. The Technical Specifications documentation will be updated and shared with F3 at M6 and 2 months before the end of the assignment for validation .

### 3.4 Corporate design requirements

Further development has to be consistent with the logo, design style and colors already used in the SUNSHINE platform.

The corporate design for the SUNSHINE platform will be developed by Ekubrojs staff. It contains:

- Logo specification, including logo variations, structure of the logo, usage examples, spacing considerations, examples of incorrect use and stationary like letterhead, envelope and business cards - this includes both the EUROPA logo and the SUNSHINE logo.
- Style guide that specifies how the project should be presented online, including typography, text, icons, layout, buttons, links, forms, lists and other elements - this includes both the EUROPA logo and the SUNSHINE logo;
- Visual identity guideline that suggests the right usage of color, imagery and typography this includes both the EUROPA logo and the SUNSHINE logo;
- Collateral templates providing files that contain examples of email signatures, presentation templates for PowerPoint, Keynote this includes both the EUROPA logo and the SUNSHINE logo.

This graphic identity must be maintained in the continued development of the platform and the onboarding process.

## 4. Specific requirements for the Tenderer

The tenderers are requested to read the tender document carefully and ensure compliance with all specifications / instructions herein. Non-compliance with specifications / instructions in this document may disqualify the tenderers from the tender exercise. Notwithstanding the above, the Employer reserves the right to assign only some of the activities.

All tenderers, irrespective of nationality or type of corporate organization, should meet the following **criteria** and attain the required competences and skilled personnel for the execution of:

The Applicant shall be a legal entity, or a combination of them (consortium), incorporated, registered and operating in any jurisdiction without limitations and being in good standing at the date of submission of the Tender Application Documents without any litigation pending or threatened to and/or claim and/or suit and/or actions and/or criminal, civil, tax or administrative proceedings before any competent authority or before any arbitrator of any nature, and there are no circumstances which have been or may give rise to litigations, claims, actions, suits, proceedings to which the Tenderer is a party that, if adversely determined,

would have a material adverse effect on its financial condition or prospects and ability of the Tenderer to perform its obligations hereunder. In the case of a consortium all partners shall be jointly and severally liable for all obligations of the consortium.

## 5. Applications for this tender

Applications for this tender shall be submitted to [admin@fcubed.eu](mailto:admin@fcubed.eu) no later than at **8:00 p.m. CET** on the **24<sup>th</sup> March, 2021**. The Tenderer can revoke or amend its tender application till the deadline for submission. Non revoked applications shall be deemed as binding on the respective tender applicant upon their acceptance by the Employer.

Any tender received after the deadline for submission or improperly arranged for security of its contents will be rejected and returned unopened to the tenderer.

### 5.1 Content of the tender application

Each tender application shall contain the following information:

- Company and contact details of the applicants.
- Registration information of the legal entity named above, including a certificate of good standing.
- In case of consortium, consortium agreement.
- Company presentation – general company information, list of the projects executed, overall company structure, number of personnel. Optional: names and education details of the company management, key personnel CVs enlisting relevant expertise from the field, etc.
- 
- CVs of the web designer, programmer, front-end developer and graphic designer to be in charge on behalf of the Tenderer with the execution of the work under this tender.
- Quality Assurance System deployed by the Applicant.
- Levelled-out hourly rate .
- Financial offer for the completion of the scope of works under this tender entailing the respective breakdown of costs.

[All documents forming part of the application should be in English language.](#)

Supporting documents and printed materials that are part of the application may be in another language, provided they are accompanied by an accurate translation of the relevant passages in English.

## 6. Procedure for evaluation of the applications

The Procurement Commission (hereinafter – Commission) which is composed of 3 independent persons solely appointed by the Employer can apply for prolongation of the tender validity in writing. If agreeing to prolong the tender, the Employer shall approve it in writing before the date set by the Commission no earlier than in 7 days.

From the deadline for submission of applications to the time of notification of the results of the Tender, any Applicant that wishes to contact the Employer on any matter related to the Tender award, may do so but only in writing.

The Contract shall be awarded to the Most Economically Advantageous Tender (MEAT).

The (MEAT) is established by weighing technical capacity and experience against price on a 80/20\* basis respectively. This is done by multiplying:

- the technical scores awarded to the offers by 0.80\*
- the financial scores awarded to the offers by 0.20\*

Information relating to the evaluation of applications shall not be disclosed to Applicants or any other persons not officially concerned with such process. On completion of the Tender procedure, notification for the personal result of each Applicant shall be sent. The applicant ranking highest in terms of its scores received by the Commission shall be invited to conclude the Contract.

**Funding for Future B.V.**

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