



**Invitation to tender**

for open competition under the EEA threshold  
when procuring:

**Baltic-Nordic Roadmap for Cooperation on Clean Energy Technologies**

**(Deadline: 02.06.2021, 13:00 CEST)**

## Baltic-Nordic Roadmap for Cooperation on Clean Energy Technologies

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## 1. Introduction

### 1.1. About the contracting authority

Nordic Energy Research is an institution under the Nordic Council of Ministers which manages and finances international research programs and projects that add value to national work in the Nordic countries. In addition, we perform certain secretariat and analytical functions in the energy policy cooperation under the Nordic Council of Ministers. The board of Nordic Energy Research comprises representatives from the authorities and ministries responsible for energy research funding in the five Nordic countries Denmark, Finland, Iceland, Norway, and Sweden, who also contribute to most of the organisation's funding.

In this invitation to tender, Nordic Energy Research acts as the contracting partner on behalf of the [Baltic-Nordic Energy Research Programme](#) which funds this report and was initiated by Nordic Energy Research to promote energy research and analysis in the Baltic states and to inspire intra-Baltic and Baltic-Nordic collaboration.

### 1.2. Overview

The Board of the Baltic-Nordic Energy Research Programme recognises the need for low-carbon, energy efficient technologies, and to organise research, development, demonstration/pilot and innovation activities from a digital energy system and network perspective. This requires cooperation across the energy, transport, infrastructure, and buildings sectors, on areas such as electrification, energy storage, zero carbon fuels, and smart cities.

There is a need for insight into the status of clean energy-related technologies in the Baltic countries as well as European and worldwide tendencies, regarding research, development, demonstration/pilot and innovation activities, and with respect to their strengths, limitations, and potential applications. This study sets out to determine which clean energy-related technologies should be pursued through Baltic-Nordic cooperation and prioritized by the Baltic countries in terms of investment, from now to 2030, 2050 and beyond.

#### 1.2.1. Background

The Baltic and Nordic countries need to identify high-priority clean energy-related technologies and associated research, development, demonstration and innovation activities to invest in over the coming years, both individually and collectively, that could mature for 2030, 2050 and beyond, and

contribute to the decarbonization targets of the individual countries, the Baltic-Nordic region, and the EU. As such, the exact technologies detailed in this study should correspond to the decarbonization scenarios previously outlined in other relevant studies, as well as the Horizon Europe work programme and global technology trends.

For example, [Baltic Energy Technology Scenarios 2018](#) found that, amid electrification and increasing electricity demand, greenhouse gas reductions in the Baltic countries should be led by the electricity and district heating sectors, followed by transport, buildings, and other sectors. Biofuels may be needed to decarbonise heavy trucks, airplanes, and ships, while heat pumps, solar electricity and solar heating in buildings could become more common. Recently, [Heat Pump Potential in the Baltic states](#) assessed the viability and potential of heat pump technology across the region.

The European Commission is also finalising its research and innovation framework for 2021-2027, and the first [Horizon Europe work programmes](#) are expected to be adopted by May 2021. The Horizon Europe Partnership [Clean Energy Transition](#) has been endorsed by 28 European countries and the European Commission in November 2020, and is expected to be approved by May 2021 – as part of [Horizon Europe Cluster 5](#) Climate, energy and mobility subgroup's work program for 2021-2022 – featuring 8 transdisciplinary challenge-driven priority areas. The [Driving Urban Transitions](#) partnership has been similarly drafted, listing technologies to be prioritised. The Commission also released the [Clean Energy Transition – Technologies and Innovations Report](#) analysing the potential of various energy technologies.

Other initiatives include the first annual report on [progress of clean energy competitiveness](#) of EU industry and technologies, which checks if their development is on track to deliver on long-term climate goals. Moreover, Mission Innovation – a global initiative of 24 countries and the European Commission – released the [Innovation Challenges Impact Report](#), which details the outcomes of key collaboration projects on clean energy research and development. Additionally, the International Energy Agency's (IEA) [Energy Technology Perspectives 2020](#) offers advice regarding clean energy technologies needed to reach international climate and sustainable energy goals.

The Board of the Baltic-Nordic Energy Research Programme takes the clean energy-related technologies identified in the above-mentioned initiatives as the point of departure for this study.

### *1.2.2 Objective*

The objective of this study is to determine which clean energy-related technologies identified in the above initiatives are most relevant for the Baltic and Nordic countries and for Baltic-Nordic research cooperation, in terms of synergies, digital interconnectivity, fuel production capabilities, demand-side management and development potential, from now to 2030, 2050 and beyond.

### *1.2.3. Tasks*

The following tasks are set forth, with percentages indicating their weight relative to one another:

1. (15 %) Provide an overview of smart city solutions, energy systems integration, and digital energy technologies, as well as associated research, development, and innovation activities in each Baltic country, in terms of technological readiness level, data collection practices and impacts;
2. (15 %) Consider the future energy balance in the power generation, transport, heating and cooling, infrastructure, and building sectors, and assess the needs of each Baltic country for clean energy-related solutions, such as low or zero carbon technologies, integration of renewables, electrification, digitalisation, energy storage, and alternative fuels such as hydrogen or biofuels;

3. (30 %) Compare the most relevant clean energy-related technology options according to the needs of each Baltic country, considering the strengths, limitations, and applications of each technology, as well as regional and spatial aspects, including impacts of different technology options in densely versus sparsely populated municipalities;
4. (40 %) Identify potential synergies between Baltic-Nordic energy research cooperation and green export potential of relevant technology options, and based on this, define a roadmap for further development of these technologies from now to 2030, 2050 and beyond, building on key economic, policy and supply chain assumptions, and with emphasis on the EU market.

The study should be delivered as a single report with annexes on Estonia, Latvia, Lithuania and the Nordic countries, along with two visualised factsheets summarising the main results, most relevant technologies, and a flow chart illustrating the cooperation roadmap.

#### 1.2.4. Method

The study shall be based on a review of authoritative literature and interviews with relevant stakeholders. The consultant is responsible for defining a detailed approach to the above tasks.

The study is to be conducted in collaboration with Nordic Energy Research. The tender should document the consultant's understanding of energy research in the Baltic countries, Baltic-Nordic cooperation on energy technologies, and relevant Horizon Europe policy initiatives.

#### 1.2.5. Preliminary timeframe & deliverables for the project execution

In the table below, the proposed timeframe and deliverables are set out:

Action	Deliverable	Date	Responsible
Contract signed	Contract	29.06.2021	NER
Kick-off meeting	Minutes from meeting	29.06.2021	Consultant
Pre-draft sketch	Pre-draft sketch	09.09.2021	Consultant
Present draft sketch report to Board	Oral presentation, Baltic capital/video call	21.09.2021	Consultant
Draft report	Draft report	04.11.2021	Consultant
Second draft report	Draft report	06.01.2022	Consultant
Final report	Final report, incl. two visualised factsheets with main results, most relevant technologies and cooperation roadmap	03.02.2022	Consultant
Language check of final report	Comments to editor	17.02.2022	Consultant/NER
Layout customization of the report	Comments to NordPub	23.02.2022	Consultant/NordPub
Final report presentation, for energy-technology related interest groups	Oral presentation, Baltic capital/video call	March/April 2022	Consultant

Contract signature will be done by e-mail or mail. The kick-off meeting will be conducted via Teams/teleconference. The presentation of the final report should be determined during the project.

#### 1.2.6. *Use of the report and the results*

The report will be offered as a tool to be used by Baltic ministries and other relevant stakeholders. The finalized report will be published in English and made publicly available on Norden Publications portal (NordPub, <https://norden.diva-portal.org/smash/search.jsf?dswid=-7222>). Applicants are requested to make themselves familiar with the Norden design manual (<http://design-en.norden.org/>) when preparing the final report.

#### 1.2.7. *Value of the assignment*

The total cost for the tender may not exceed 330 000 NOK, VAT excluded. All expenses should be included.

#### 1.2.8. *Contract*

A contract shall be established with the awarded consultant.

The supplier may have subcontractors to specific task, but it will be the supplier who should have the entire responsibility regarding deadlines, quality insurance and finances etc. vis-à-vis the purchaser. If subcontractors are used, documentation for their participation in the project must be submitted, their role must be described and together with their estimated budget allocated.

#### 1.3. *Announcement of the tender*

The invitation to tender will be sent to Doffin and TED as specified in Chapter 2.5.

## 2. Administrative regulation

#### 2.1. *Purchase procedure*

The procurement directive is not directly applicable to Nordic Energy Research as an international organization located in Oslo. Consequently, only the general principles of the EU/EEA will apply to this procurement process. This procurement process will be conducted in accordance with the Norwegian Act on Public Procurement of 17 June 2017 (Lov om Offentlige Anskaffelser – LOV-2016-06-17-73) and the Norwegian Regulation on Public Procurement (FOA; Forskrift om offentlige anskaffelser – FOR-2016-08-12-974) of 18 August 2016 part I.

The purchase procedure will be executed in an open competition according to the main principles of FOA. This procedure allows all potential suppliers to bid.

#### 2.2. *Requested structure of the competition*

The competition will be based on:

- this document, containing information about the content, procedures and frames describing the process until the award and signing of the contract, and
- the appendices as presented below.

Appendices:

Appendix A: EHS declaration

Appendix B: Tender

Appendix C: Disclaimer and Deviation

Appendix D: Consultancy Agreement Draft

Appendix E: Standard Terms of Contract for Consultants

Appendix F: ESPD (optional)

#### 2.3. *Contact information*

Contact persons concerning this purchase are  
Kevin Johnsen, Senior Adviser at Nordic Energy Research. E-mail: [Kevin.Johnsen@nordicenergy.org](mailto:Kevin.Johnsen@nordicenergy.org)  
and Marton Leander Vølstad, Adviser. E-mail: [Marton.Leander.Volstad@nordicenergy.org](mailto:Marton.Leander.Volstad@nordicenergy.org)

#### 2.4. Language

All communication, written and oral, regarding this matter should be made in English. This also applies for the tender itself. Possible legal questions must be communicated in Norwegian.

#### 2.5. Execution of the tendering process

Activity	Date
Announcement in Doffin and TED	30.04.2021
Deadline for questions concerning the invitation to tender	24.05.2021
Answers to questions concerning the invitation to tender	26.05.2021
Deadline for tender submission	02.06.2021, 13:00 CEST
Opening of tender	02.06.2021, 14:00 CEST
Evaluation of tender	02.06-14.06.2021
Contract award intention announced	16.06.2021
Deadline for submitting objections to award	25.06.2021
Contract award and signing	29.06.2021
Kick-off meeting	29.06.2021

#### 2.6. Correction, addition and/or change of the competition

Before the deadline of the competition, the purchaser is entitled to make corrections, additions or changes to the competition that are not significant.

#### 2.7. Questions for the competition

Any questions the suppliers may have for the competition must be received by the deadline indicated in the schedule 2.5.

Questions must be sent by e-mail to the contact person of the competition as indicated in 2.3. All questions will be answered anonymously and made available for all who have registered to receive the competition on Doffin and TED in due time before the deadline of the competition.

#### 2.8. The participation cost of the supplier

Any cost that the supplier may have in connection with the preparation, delivery or follow-up of the tender and the procurement process will not be refunded. Participation in the tendering process will in no way commit the purchaser to enter into a contract with the supplier or involve the purchaser in financial obligations.

#### 2.9. Return of tender

The purchaser will not return the tender of the supplier.

## 3. Wages and working conditions

If this competition includes services or construction work in accordance with regulations of February 8, 2008 no.112 on wages and working conditions in public contracts, separate requirements and remedies related to this apply.

## 4. Requirements for the tender

### 4.1. Structure of the tender

The tender should contain the following documentation that should be structured according to the following sectioning.

Section no.	Documentation
1.	Tender which should include the following: 1.1 Reference to the name of the competition 1.2 The address, phone number and e-mail address of the supplier 1.3 The contact person of the supplier and his phone number and e-mail address 1.4 Confirmation of the validity of the tender, cf. section 4.3. 1.5 Binding signature from a person with authority to sign on behalf of the supplier
2.	Documentation of eligibility: Documentation as described in 6.2-6-4, or alternatively, via completion of the European Single Procurement Document (ESPD) available as Appendix F
3.	Requirements for technical and professional qualifications ref. section 6.5 Documentation of award criteria ref. section 7.1.
4.	Any modifications or alteration to the competition or the contract ref. section 4.7. and Appendix C.
5.	Other relevant information.

### 4.2. Delivery Format of the tender

Tenders should be delivered by e-mail to [tender@nordicenergy.org](mailto:tender@nordicenergy.org) with the following subject line:  
**Baltic-Nordic Roadmap for Cooperation on Clean Energy Technologies – TENDER**

The tender should be in PDF format and/or another Microsoft Office compatible format.

### 4.3. Validity

The tender must have a validity of a minimum of 90 days from the day of the deadline of the tender.

### 4.4. Contract

The supplier must base his tender on the enclosed contracts (Appendices D and E).

### 4.5. Tender for all or part of the delivery

It is not permitted to submit tenders for part of the delivery.

### 4.6. Alternative tenders

It is not permitted to submit alternative tenders.

### 4.7. Reservations and amendments

Significant reservations and amendments shall be stated precisely and unambiguously so that the purchaser can evaluate the offer without making contact with the supplier. Reservations and amendments shall clearly and unambiguously refer to the relevant appendix and point in the tender documents and shall be annexed to the tender.

The supplier shall clearly specify the consequences that any reservations and amendments have or may have on the performance, price and/or other aspects of the tender.

### 4.8. Revocation of tender

A tender may be revoked or altered until the deadline of the tender. Revocation shall be done in writing. Change of the tender is considered a new offer.

## 5. Delivery of tender

### 5.1. Deadline of tender

The tender must reach the purchaser no later than the deadline specified in section 2.5. The deadline is absolute. Late submitted tenders will be rejected. The supplier carries the risk of failure or delay in shipment.

### 5.2. Delivery method and delivery address

The tender must be delivered in the format specified in section 4.2.

## 6. Eligibility requirements

### 6.1. About the eligibility requirements

The supplier must meet the requirements listed below in order to be eligible for participation in the competition. The supplier is responsible for providing all documentation requested below as proof of the requirements imposed. Lack of documentation or incomplete information may lead to the rejection of the tender. Only qualified suppliers can be awarded the contract.

*Self-declaration:* Documentation regarding 6.2 – 6.4 may be provided by completing the European Single Procurement Document (ESPD), available as Appendix F. In which case, the formal documents will be required later in the evaluation process, for the selected tender candidate.

### 6.2. Mandatory requirements

Requirements	Documentation requirements
The supplier must have fulfilled their obligation relating to the payment of tax, payroll tax and VAT.	<p>Tax certificates not older end six months calculated from the deadline of the tender. Tax certificates are:</p> <p>For Norwegian suppliers:</p> <ul style="list-style-type: none"> <li>Form from the Tax Commission for VAT (RF-1244) issued by the tax office.</li> <li>Form from the Tax Commission (RF-1244) for tax issued by the Treasurer</li> </ul> <p>For foreign suppliers:</p> <p>Foreign suppliers must submit corresponding certificates from their country showing that they have complied with tax matters. If the authorities in the country concerned do not issue such certificates, the supplier shall submit a statement confirming that all taxes have been paid. The declaration must be approved and signed by the supplier's CFO/finance manager.</p>
For work to be performed in Norway, the supplier must fulfil Norwegian HES requirements.	<p>Only for Norwegian suppliers:</p> <p>Completed and signed HES statement according to the Norwegian Regulation health, environment, and safety at work (FOR-1996-12-06-1127 Forskrift om systematisk helse-, miljø- og sikkerhetsarbeid i virksomheter (Internkontrollforskriften). Please use the attached template, see Appendix A.</p>

### 6.3. Requirements for organizational and legal position

Requirements	Documentation requirements
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The supplier shall have a legally established company.	For Norwegian suppliers: Certificate of registration For foreign suppliers: Confirmation that the supplier is registered in a trade or business register acc. the legislation of the country where the supplier is established.
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#### 6.4. Requirements for economic and financial position

Requirements	Documentation requirements
The supplier shall have sufficient financial strength to perform contract.	Excerpt from the supplier's annual report including notes with the report from the Board and the auditors for the past two financial years.

#### 6.5. Requirements for technical and professional qualifications

Requirements	Documentation requirements
The supplier must have good experience from similar deliveries	References from a maximum of 3 relevant deliveries/assignments within the last 4 years for each supplier involved. References shall at least contain: <ul style="list-style-type: none"> <li>• A short description of the delivery</li> <li>• Implementation date</li> <li>• Scope of delivery and its price</li> <li>• Name and phone number of a contact person responsible for ordering</li> </ul>
The supplier must have appropriate contact information	Name and phone number for reference for the proposed assignment leader.

## 7. Award criteria and evaluation

### 7.1. Award criteria

The contract is awarded to the supplier who financially has the most favourable tender based on the below-mentioned criteria.

Award criteria	Documentation	Weight %
<b>Expected quality</b> Project description in the proposed assignment including relevance, ambition, quality, organization, and structure ref. section 1.2.1 – 1.2.7.	The supplier must supply the following documentation (maximum 5 A4 format pages, Times 12, 1,5 line spacing): <ul style="list-style-type: none"> <li>• The supplier must describe their understanding of the assignment and the implementation of it (project and solution description).</li> <li>• The supplier must account for the organization and structure of the project with deliveries/milestones in preparing the report, including planned budget and persons accountable for part deliveries</li> <li>• The supplier must describe their approach and choice of methodology</li> </ul>	45

	<ul style="list-style-type: none"> <li>The supplier must describe their sources for information</li> </ul>	
<b>Price of the assignment</b> The total price is maximum 330 000 excl. VAT.	Price must be in NOK excl. VAT. This includes all cost required to execute the tender (i.e. salaries, travel cost etc.)	10
<b>Offered expertise</b> Offered expertise means the expertise and experience of the key personnel who is offered to implement this specific contract.	<ul style="list-style-type: none"> <li>The supplier must present his/her CV with an overview of expertise and experience from relevant projects for the named key personnel.</li> <li>The distribution of labour input to key personnel shall be specified and will be considered.</li> </ul>	45

### 7.2. Evaluation

All approved offers will be evaluated with scores per award criterion, where 10 is the highest and 0 the lowest. The overall result per criterion will be weighted according to the weighing degree above, ref. section 7.1.

## 8. Termination of competition

### 8.1. Cancellation of competition and total rejection

The purchaser reserves the right to cancel the competition or to reject all offers, if there are reasonable grounds.

### 8.2. Notification of the choice of supplier and waiting period

The purchaser informs all suppliers in writing and simultaneously about whom the purchaser intends to award the contract as soon as the choice of supplier is made. The notification will include an explanation for the choice and specify the waiting period from the time the award is made known until the contract signing is planned (concluding the contract). If the purchaser finds that the award decision is not in accordance with the criteria for the choice of supplier, the decision can be annulled until contract is signed.