

JASPERS Networking Platform
Supporting investments in Smart Grids in 2014-2020

Application and Implementation Procedures

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AGENDA

- **Legal/Administrative eligibility criteria and application guide**
- Proposed standard tender documents
- Proposed requirements of project implementation units

PROPOSED ELIGIBILITY CRITERIA

- Eligibility criteria

1. **Technical eligibility criteria**

- Competitive selection of eligible projects

- **Eligible projects to be compared based on a cost-effectiveness index (KPI score/project cost per user)**

In order to support project promoters' applications:

- **Application guide and standard tender documents have been produced**

Legal/administrative eligibility criteria

1. Application meets formal requirements

- Does the application comply with application procedures and requirements?

2. Project implementation units possess necessary skills

- Do project implementation units possess the necessary skills to implement the project?

Application guide

- Description of the Operational Programme, of the Priority Axis and Investment Priority and the Institutional framework for implementation of the Operational Programme
- Rules for the Call for Project Proposals
 - Eligibility of applicants
 - Eligibility of the smart grid investment
- Completion and Submission of the Application
- Assessment and selection
 - Administrative compliance of the application
 - Application eligibility assessment
 - Selection of the application
 - Approval of the application
- Application form template
- Compliance checklist

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Proposed standard Tender Documents

- **Model Invitation for Tenders:** in line with fundamental principles of **EU public procurement law** and the provisions of **directive 2004/17/EC**.
 - Recommendation of open-single stage procedure
- **Model contract** - For the procurement of Smart Grid assets and of services / minor works for their installation / integration into the grid, it is recommended to use contracts for “supply and installation of plant and equipment” based on international standards
 - → The contractual framework fits to the context of the majority of the contracts to be awarded
- **Modular structure: Both the Model Invitation for Tenders and the Model Contract include:**
 - A set of Standard General Conditions, not to be altered
 - A set of Special Conditions to be specified on a case-by-case basis, depending on the individual needs of the contract in question.
 - → Uniformity and best practice are ensured, while retaining an adequate degree of flexibility.

Structure of Standard Tender Documents

Volume I. Model Invitation for Tenders

- .i Instructions to Tenderers
- .ii Tender Data
- .iii Tender Form
- .iv Tender Security Form
- .v Manufacturer's Authorization Form
- .vi Letter of Acceptance
- .vii Covenant of Integrity

Volume III. The Requirements

- .i Technical Specifications
- .ii Variant
- .iii Drawings and Other
Documentation

Volume II. Model Contract Agreement

- .i General Condition of Contract
- .ii Special Conditions of Contract
- .iii Appendices to the Contract
 - A.1: Terms and Procedures of Payment
 - A.2: Price Adjustment
 - A.3: Insurance Requirements
 - A.4: Time Schedule
 - A.5: List of Subcontractors
 - A.6: Scope of Works & Supply by the Employer
 - A.7: List of Documents for Approval or Review
- .iv Performance Security Form
- .v Bank Guarantee for Advance Payment
- .vi Form of Completion Certificate
- .vii Form of Operational Acceptance Certificate
- .viii Change Order Procedure

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REQUIREMENTS FOR PROJECT IMPLEMENTATION UNITS

Level of competence of project implementation units are assessed in four domains:

- **Project management**
 - High quality project outputs within budget and deadlines
- **Cost control**
 - Ensuring that the project remains financially sustainable throughout its lifetime and is completed within the budget
- **Technical quality**
 - State of the art solutions and implementations, in compliance with technical best practices
 - Detailed plan to measure the project's impact for ex-post calculation of KPIs and benefits compared to pre-project conditions
- **Dissemination of project results**
 - Transparent dissemination of project results, for both technical and non-technical audiences, to support knowledge sharing

PROPOSED REQUIREMENTS FOR PROJECT IMPLEMENTATION UNITS

- **Project management - 3 recent references showing experience in:**

- Management of power system projects
- Management of projects of the same size of the proposed Smart Grid project
- Management of project consortia of a size of the proposed Smart Grid project
- Management of projects having a significant degree of innovation and requiring capabilities to manage project risks

- **Cost control**


- 3 recent references in projects of similar size/complexity

- **Technical quality**

- Strong knowledge of power systems, including relevant knowledge and experience in power system operation and control
- Strong knowledge of ICT and control systems, including relevant field experience in the application of automation and control systems for power system operation and control
- Strong knowledge in quantifying key performance indicators and carrying out economic cost-benefit analysis (including externalities evaluation etc.) in the energy/power sector
- (In case the project includes the participation of consumers) marketing/sociological expert(s), with proven experience in customer recruitment/relation for sociological studies

- **Dissemination of project results**

- Expert(s) in marketing and communication, with relevant experience in energy-related projects, to present clearly (ex-post) the results of the project to technical and non-technical audiences

 **Competences to be demonstrated at submission of application**

 **Recommended competences to be demonstrated before project implementation**



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