I approve

Lt.Col. Nicolas HENRY
NATO ENSECCOE Deputy Director

Vilnius, 16 December 2014

No. E-01-191-

STATEMENT OF WORK

For the procurement of the second part of the study/project
"ENERGY MANAGEMENT IN THE MILITARY EXPEDITIONARY ENVIRONMENT"

I. GENERAL PROVISIONS

1. NATO Energy Security Centre of Excellence (NATO ENSECCOE hereinafter referred to as the Contracting Authority or the Authority), located at Šilo g. 5a, LT-10322, Vilnius, taxpayer's identification code – 9000052783, intends to procure services for the second part of the study/project "ENERGY MANAGEMENT IN THE MILITARY EXPEDITIONARY ENVIRONMENT" (hereinafter referred to as the Services).

2. The procurement is to be carried out in accordance with the rules approved by NATO Energy Security Centre of Excellence, the Civil Code of the Republic of Lithuania (Official Gazette, 2000, No. 74-2262) (hereinafter referred to as the Civil Code), and other regulations governing procurement as well as the terms and conditions present in this statement of work (hereinafter referred to as the tender conditions).

3. The procurement is to be carried out in accordance with pertinent international laws and regulations, the principles of equality, non-discrimination, transparency, mutual recognition, proportionality, confidentiality and impartiality.
   The language of the procurement is English.

4. The Contracting Authority is not a value-added tax (hereinafter referred to as VAT) payer.

5. Any information or clarifications of the tender conditions, reports or any other communications between the Contracting Authority and Service Providers are to be carried out only in writing (only the users on the Service Provider's side who have accepted an invitation and are attributed to the procurement shall receive the messages). The following persons are authorised to keep direct contact with the Service Providers:
   - for procurement/administrative issues: Ona Tatolytė, Administrative officer of the NATO ENSECCOE, phone 003706870671008, fax 00370870671010, e-mail ona.tatolytė@enseccoe.org;
   - for contents/services practical issues: Lt Col Luca Dottarelli, Head of Doctrine and Concept Development Division in the NATO ENSECCOE, phone 0037052032546 (mobile 0037061642014) e-mail luca.dottarelli@enseccoe.org .

II. SUBJECT OF PROCUREMENT

6. The aim of this study is to identify relevant means, present recommendations and a detailed ad hoc application plan how ISO (International Organization for Standardization) 50001:2011 *Energy management systems* can be applicable in the military expeditionary environment, implementing energy use control, improving energy efficiency and better energy performances, through the production of a practical handbook with comprehensive technical valuable consistency, including the identification of all indicators and constrains (including legal/copyright connected with full ISO 50001 application), for possible certification containing a specific customised proposal for NATO military expeditionary environment following *"Energy management systems, requirements with guidance for use of ISO 50001"* (Licensed copy already in NATO ENSECCOE).

   The results (introduction study, handbook, certification application (action) and material for lectures - as better specified in points 6.1 and 6.2) of the Services provided under this agreement intent to be the second part of the study for the experiment ""ENERGY MANAGEMENT IN THE MILITARY EXPEDITIONARY

ENVIRONMENT", a project to test and discover primary in exercises/training if an energy management model can be able to improve energy efficiency in the sustainment of military compounds through exploiting non-material aspects of energy use and power generation in operational environment without limiting operational capabilities (energy management contributes to ENSEC) in power projection in different environments and for all services.

The starting point and basement to use for the services is the report from the first part of the study composed of a baseline study, containing data and record collection from available studies and research, trials and experiments on the application of energy management and energy efficiency model in the military expeditionary environment, with specific focus on the ones related to the reducing of energy consumption through energy management systems/models/tools. This report provides an overview of the theoretical and practical work done so far portraying and analysing how these experiences have contributed in the military capabilities and energy saving. It will be available for the Service provider (report available on request, use under copyrights rules).

In fact it is considered essential to provide NATO with an international recognised customary model for an effective energy management system, inclusive of intelligent monitoring and metric to control power sources monitoring of energy use in real-time through the development of an energy management system (EnMS) and an energy management information system (EMIS, if needed) in order to help the organization in reducing its expenditure related to energy (saving money, reduce logistic tail and conserve resources in the NATO deployments increasing operational capabilities during exercises and operations.
The ISO 50001 Energy Management Systems represents international best practice and most valuable standards in energy management and thereby improves energy efficiency.
Those means and expected results are to be further tested and validated during relevant experiments and exercises in the framework of NATO CD&E and are expected to be used for preparation of tailor-made education and training courses as well as exercises and for future ISO standardization certification.

Following the above mentioned framework, the characteristics of the services to be procured are specified below and the services to be offered therein must comply with the requirements set forth as in the following point 6.1 and 6.2:

6.1 The Service Provider shall undertake a research and produce a study on the applicability of energy management models based on ISO (International Organization for Standardization) 50001:2011 and present recommendations and a detailed ad hoc application plan how energy management system can be applicable in the military expeditionary environment.
The expected results will be an introduction study , including argumentation, methodise, data, example and record from existing available studies and research, as a scientifically valid summary on possibility EMS in military deployed infrastructures and energy/fuel saving results and the following deliverables:

6.1.1 a practical user friendly handbook" *Energy management systems- guidance for energy efficiency model applied in the military deployed compound*" with comprehensive technical valuable consistency, including the identification of all indicators and constrains, for possible certification and possible legal constrains for the specific customised proposal for NATO military expeditionary environment following "Energy management systems- requirements with guidance for use of ISO 50001" (Licensed copy already in NATO ENSECCOE) energy efficiency model applied in the military deployed compounds.

6.1.2 a detailed application plan for possible future certification in the framework of NATO ACT CD&E and training/exercise contest on tailored implementation of ISO 50001 in order to improve energy efficiency of military units during deployment in exercise and operations.

6.2 The Service Provider shall participate to connected workshop/working groups and panel that may be organized (as set in the point 12) in order to discuss validate/tested analyse the proposed EMS and shall provide material (i.e. power point presentation with notes) for lectures (1,5 hours/2 periods) in residential course as well as for a module (30 min.) for distant learning course on energy management and implementation of ISO 50001 .

7. The results (introduction study, handbook, application plan and lectures material) of the Services provided under this agreement shall be the second part of the study for the project/experiment ""ENERGY MANAGEMENT IN THE MILITARY EXPEDITIONARY ENVIRONMENT", in order to finalize the project to test and discover in exercises/training if an energy management model can be able to improve energy efficiency in the sustainment of military compounds through exploiting non-material aspects of energy use and power generation in operational environment without limiting operational capabilities.

8. The Contracting Authority shall undertake to provide, within its capabilities, the information and the documents necessary to support the Service Provider.

The services and procurement completion (delivery of results of the services) date **shall be within 7 months from the awards of the contract.** The location of the provision of the services shall be the territory of the Republic of Lithuania.

III. QUALIFICATION REQUIREMENTS FOR THE SERVICE PROVIDERS

9. The Service Provider must meet the minimum qualification requirements and possess necessary knowledge, experience as defined in the following points; it has the right to engage qualified personnel in the activities required for the execution of the contract:

- ISO 9001 Quality Management Systems certified entity;
- International energy management certification experience (minimum 2 years) and capabilities in ISO application and certification including legal aspects related to ISO applicability;
  administrative and project management abilities and experiences in the management of certification and other customised projects;
- university-type education and preferred professional military experiences;
- project development and management experience and good organisational abilities (participation in research and ISO certification in military is desirable);
- experience and ability in carrying out research/study work together with military personnel with adequate networking in NATO military environment;
- recent experience in the preparation of analytical studies, customized research and/or implementation plans;
- recent experience in executing or developing projects/research in areas connected to energy;

The tender shall include documents/example to prove the above mentioned requirements.

10. During the execution of the contract, the Service Provider should prepare and present 2 interim reports;
- Interim Report no. 1 should be provided by 3 months from the contact awards;
- Interim Report no.2 should be provided by 6 months from the contract awards (3 months after the 1st interim report) in order to show and outline the work done and to discuss/agree on the progress of the contract.

Interim Report no.1 should include the drafts of the introduction study (summary) and ISO handbook plan.
Interim Report no.2 should include finalized introduction, draft handbook, application plan and material for lectures concerning EMS (as for point 6.2).

11. At the end of the execution of the contract, the Service Provider should produce and present the final products (introduction study, handbook ,ISO application plan for future possible certification and material for lectures), where in the notes received from the Contracting Authority in the debates during the interim reports are taken into account. Amendments/supplements should be coordinated with the responsible employees of

the Contracting Authority and their positive evaluation should be obtained. All the reports should be drawn up in a correct English language. The final presentation of the products will be organized and coordinated by the contracting authority

IV. PROPOSAL OF THE SERVICE PROVIDER

12. The Service Provider should provide a tender proposal with indication of the total price of the proposal in terms of euro excluding VAT. The tender proposals higher than 30.000 euro will be not considered.
Travel cost for participation to activities (if needed) decided by ENSECCOE (point 6.2) will be reimbursed on NATO Travel for duty (TDY) financial regulations (reimbursement of travel expenditure, accommodation and per diem with specific limits) and the service provider should make available also a separate optional offer concerning cost for expert participation to different activities and it has not to be considered in the main tender proposal.
The Service Provider should provide the CVs (curricula vitae) of all the person/s/experts (not to be changed in the service provision period) defining the responsible contracting authority with regard to the specified requirements.
The final products (services), excluding appendices and bibliography, should be:
- introduction= at least 10 pages (approx. 3000 words) including data/statistics;
- handbook= at least 50 pages (approx. 15000 words) including data/statistics/metrics;
- the plan for ISO 50001 application should be at least 30 pages (approx 15000 words);
- material for (2 hours lectures and 30 min ADL module) in EMS/ISO 50001 applicability/implementation in military deployed environment.

Tender proposals will be evaluated on :
- technicality and concreteness of the proposal solution including methodology;
- qualification and experience:
- price.
Moreover, the quality of study and the analysis should be acknowledged as satisfactory by a majority of the members of the Contract Awards Committee. Likewise, the quality of the proposed handbook and planning process how ISO 50001:2011 Energy management systems can be applicable in the military expeditionary environment should be unanimously considered as satisfactory by all the members of the Commission.

13. The Contracting Authority shall not demand that group of entities, after declaring its tender as a successful one and the proposal of the Contracting Authority to award the contract, to acquire any particular legal form.

14. Special provisions will be agreed upon the parties to detail the contract.

15. The Service Provider, either individually or as a member of a group of entities, may submit only one tender by e mail or hard copy. If the Service Provider submits more than one tender, or a member of the group of entities is involved in several tenders, all such tenders will be rejected. The Service Provider must indicate in the tender what sub-Service Providers it intends to invoke. Such indication shall not alter the main Service Provider's responsibility for performance of the contract.

16. When submitting a tender, the Service Provider must offer the full scope of services.

17. **All the tender proposal should be delivered/sent by the 9th of February 2015** 10.00 Lithuanian time at the NATO Energy Security Centre of Excellence, Šilo g. 5A, LT-10322 Vilnius, Lithuania.

18. Immediately after having analysed, evaluated, and compared the submitted tenders, the Commission shall establish the ranking of tenders proposals and the successful tender, as well as shall take a decision on the award of the contract.