

**CALL FOR TENDER F4E-[.]**

**ANNEX 1**

**MODEL CONTRACT**



**FRAMEWORK SERVICE CONTRACT**

**for [***concise* *subject matter***]**

between

**THE EUROPEAN JOINT UNDERTAKING FOR ITER AND THE DEVELOPMENT OF FUSION ENERGY**

and

[*Full name of Contractor(s)*]

**(*F4E- [.]*)**

The footnotes and the options in blue are internal instructions only and must be read and **deleted** before contracts are sent out.

Options [in roman in square brackets] are to be used or deleted.

Comments [*in grey italics in square brackets*] are to be deleted and/or replaced by appropriate data.

In order to avoid cross-referencing problems between the general conditions and the special conditions, re-numbering of the special conditions (and Annexes) **should be avoided**; unnecessary articles (or Annexes) can be replaced by "not applicable".

The general conditions should be left unchanged. Derogations should be inserted in the special conditions. In case of any modification to the standard version of the model contract, Legal officer (‘LO’) is to be consulted.

CONTRACT NUMBER — **[**F4E-[*XXX*] -*complete***]**

1. The European Joint Undertaking for ITER and the Development of Fusion Energy (hereinafter referred to as “**F4E**” or the “**Contracting Authority**”), established by Council Decision (Euratom) No 2007/198 of 27 March 2007, [(hereinafter referred to as the “**Lead Contracting Authority**") and the following contracting authorities [*insert relevant list*] (hereinafter collectively referred to as the “**Contracting Authority**”)][[1]](#footnote-1), represented for the purposes of signing this framework contract by [*forename, surname, function, department of authorising officer*],[[2]](#footnote-2)

on the one part

and

2. [*Full Contractor’s official name*]

[*Official legal form*][[3]](#footnote-3)

**[***Statutory registration number or ID or passport number***]**[[4]](#footnote-4)

[*Full official address*]

[*VAT registration number*][[5]](#footnote-5)

[appointed as the leader of the group by the members of the group that submitted the joint tender]

[*For joint tenders,* r*epeat these data as many times as there are contractors and continue numbering*]

([collectively] the “**Contractor**”), represented for the purposes of the signature of this framework contract by[*forename, surname, function of legal representative and name of company in the case of a joint tender*],

on the other part,

(each of F4E and the Contractor, individually referred to as a “**Party**” and jointly referred to as “**Parties**”)

HAVE AGREED

to the **special conditions,** the **general conditions for framework contracts** for services and the following annexes:

**Annex A** [Model for Order Forms] [and] [Model for Specific Contracts][[6]](#footnote-6)

**Annex B** Technical Specifications (IDM reference [*complete*])

**Annex C** Excerpt ofContractor’s tender (reference No [*complete*] of [*insert date*])

**Annex D** Instructions for invoicing

**Annex E** Power of attorney

**[Annex F** Daily subsistence allowances flat-rate and ceilings for accommodation][[7]](#footnote-7)

[*Insert other annexes*]][[8]](#footnote-8)

which form an integral part of this framework contract (the special conditions, the general conditions and the annexes, collectively, the “**FWC**”).

This FWC sets out:

1. the procedure by which the Contracting Authority may order Services (as defined below) from the Contractor;
2. the provisions that apply to any Specific Contract or Order Formwhich the Contracting Authority and the Contractor may conclude under this FWC; and
3. the rights and obligations of the Parties during and after the duration of this FWC.

All documents issued by the Contractor (end-user agreements, general terms and conditions, etc.) except its tender, are held inapplicable unless explicitly mentioned in the special conditions of this FWC. In all circumstances, in the event of contradiction or ambiguity between this FWC and documents issued by the Contractor, this FWC will prevail, regardless of any provision to the contrary in the Contractor’s documents.

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# Special Conditions

## Definitions - Order of priority

**I.1.1** **Definitions**

For the purpose of this FWC, in addition to the other terms specifically defined in the same FWC with initial capital letter, the following definitions, when used with capitalized terms, shall apply:

**‘Back Office’**: the internal system(s) used by the Parties to process electronic invoices.

**‘Breach of Obligations’**: failure by the Contractor to fulfil one or more of its contractual obligations.

**‘Confidential Information or Document’**: any information or document received by either Party from the other or accessed by either Party in the context of the Implementation of the FWC, that any of the Parties has identified in writing as confidential. It may not include information that is publicly available.

**‘Conflict of Interest’**: a situation where the impartial and objective Implementation of the FWC by the Contractor is compromised for reasons involving family, emotional life, political or national affinity, economic interest, any other direct or indirect personal interest, or any other shared interest with the Contracting Authority or any third party related to the subject matter of the FWC.

**‘Creator’**: means any natural person who contributes to the production of the Result.

**‘DACC’:** Electronic platform developed by F4E for managing contracts’ signature, deviations, amendments and contract changes with Contractors and to process commercial operations in accordance with the contract (e.g. release of Options, Indexation). Approval of documents in DACC is legally binding.

**‘EDI** **Message’** (electronic data interchange): a message created and exchanged through the electronic transfer, from computer to computer, of commercial and administrative data using an agreed standard.

**‘e-PRIOR’**: the service-oriented communication platform that provides a series of web services and allows the exchange of standardised electronic messages and documents between the Parties. This is done either through web services, with a machine-to-machine connection between the Parties’ Back Office systems (EDI Messages), or through a web application (the Supplier Portal). The Platform may be used to exchange electronic documents (e-documents) such as electronic Requests for Services, electronic Specific Contracts, electronic acceptance of services and electronic invoices between the Parties.

**‘Force Majeure’**: any unforeseeable, exceptional situation or event beyond the control of the Parties that prevents either of them from fulfilling any of their obligations under the FWC or a Specific Contract. The situation or event must not be attributable to error ornegligence on the part of the Parties or on the part of the subcontractors and must prove to be inevitable despite their exercising due diligence. Defaults of service, defects in equipment or material or delays in making them available, labour disputes, strikes and financial difficulties may not be invoked as Force Majeure, unless they stem directly from a relevant case of Force Majeure.

**‘Formal Notification’** (or ‘Formally Notify’): form of communication between the Parties made in writing by mail or email or DACC, which provides the sender with compelling evidence that the message was delivered to the specified recipient. Formal Notifications may take place through DACC.

**‘Fraud’:** an act or omission committed in order to make an unlawful gain for the perpetrator or another by causing a loss to the F4E's financial interests, and relating to: i) the use or presentation of false, incorrect or incomplete statements or documents, which has as its effect the misappropriation or wrongful retention of funds or assets from F4E budget, ii) the non-disclosure of information in violation of a specific obligation, with the same effect or iii) the misapplication of such funds or assets for purposes other than those for which they were originally granted, which damages F4E's financial interests.

**'Grave Professional Misconduct'**: a violation of applicable laws or regulations or ethical standards of the profession to which a contractor or a Related Person belongs, including any conduct leading to sexual or other exploitation or abuse, or any wrongful conduct of the Contractor or a Related Person which has an impact on its professional credibility where such conduct denotes wrongful intent or gross negligence.

**‘Implementation of the FWC’**: the purchase of Services envisaged in the FWC through the signature and Performance of Specific Contracts.

**‘Interface Control Document’**: the guideline document which lays down the technical specifications, message standards, security standards, checks of syntax and semantics, etc. to facilitate machine-to-machine connection. This document is updated on a regular basis.

**‘Irregularity’**: any infringement of a provision of Union Law resulting from an act or omission by an economic operator, which has, or would have, the effect of prejudicing the Contracting Authority’s budget.

**‘Notification’** (or ‘Notify’): form of communication between the Parties made in writing including by electronic means or DACC.

**‘Order Form’**: a simplified form of Specific Contractby which the Contracting Authority orders services under this FWC.

**‘Performance of a Specific Contract’**: the execution of tasks and delivery of the purchased Services by the Contractor to the Contracting Authority.

**‘Personnel’**: persons employed directly or indirectly or contracted by the Contractor to implement the FWC.

**‘Pre-existing Material’**: any material, document, technology or know-how which exists prior to the Contractor using it for the production of a Result in the Implementation of the FWC.

**‘Pre-existing Right’**: any industrial and intellectual property right on Pre-existing Material; it may consist in a right of ownership, a licence right and/or right of use belonging to the Contractor, the Creator, the Contracting Authority as well as to any other third parties.

**‘Professional Conflicting Interest’**: a situation in which the Contractor’s previous or ongoing professional activities affect its capacity to implement the FWC or to perform a Specific Contractto an appropriate quality standard.

**‘Related Person’**: any natural or legal person who is a member of the administrative, management or supervisory body of the Contractor, or who has powers of representation, decision or control with regard to the Contractor.

**‘Request for Services’**: a document from the Contracting Authority requesting that the Contractors in a multiple FWC with re-opening of competition provide a specific tender for Services whose terms are not entirely defined under the FWC.

**‘Result’**: any intended outcome of the Implementation of the FWC, whatever its form or nature. A Result may be further defined in this FWC as a deliverable. A Result may, in addition to newly created materials produced specifically for the Contracting Authority by the Contractor or at its request, also include Pre-existing Materials.

**‘Specific Contract’**: a contract implementing the FWC and specifying details of a Service to be provided.

**‘Supplier Portal’**: the e-PRIOR portal, which allows the Contractor to exchange electronic business documents, such as invoices, through a graphical user interface.

‘**Working Day’**: any day other than (i) Saturday, Sunday or any other day in which banks are required or authorized by law to be closed in Barcelona (Spain)[[9]](#footnote-9) and, if different, (ii) F4E public holidays in Barcelona (Spain), as published annually in the F4E Industry and Fusion Laboratories Portal website.

**I.1.2** **Order of priority of provisions**

If there is any conflict between different provisions in this FWC, the following rules must be applied:

1. The provisions set out in the special conditions take precedence over those in the other parts of the FWC.
2. The provisions set out in the general conditions take precedence over those in the Order Form and Specific Contract (Annex A).
3. The provisions set out in the Technical Specifications (Annex B) take precedence over those in the Contractor’s tender (Annex C).
4. The provisions set out in the FWC take precedence over those in the Specific Contracts or Order Forms.
5. [The provisions set out in the Specific Contracts take precedence over those in the Requests for Services.
6. The provisions set out in the Requests for Services take precedence over those in the specific tenders.]

Any reference in this FWC to Specific Contracts applies also, *mutatis mutandis*, to Order Forms.

## Subject matter

**I.2.1** Thesubject matter of the FWC is [*description of subject*], as better detailed in [*Section [insert relevant section, if any] of*] the Technical Specifications(Annex B)] (the “**Services**”).

**I.2.2** Signature of the FWC imposes no obligation on the Contracting Authority to purchase any of the Services. Only performance of the FWC through Order Forms or Specific Contracts is binding on the Contracting Authority for the purchasing of Services.

**I.2.3** The FWC does not confer on the Contractor any exclusive right to provide the Services to the Contracting Authority.

## Entry into force and duration of the FWC[[10]](#footnote-10)

**I.3.1** The FWC enters into force [on the date on which the last Party signs it][[11]](#footnote-11) [on [*insert date*] if both Parties have already signed it] (the “**Effective Date**”).

**I.3.2** The Implementation of the FWC cannot start before the Effective Date. Execution of the tasks may under no circumstances begin before the date on which the Specific Contract enters into force. Specific Contracts enter into force on the date indicated therein or, should such reference date be missing, on the date on which the last Party signs the Specific Contract.

**I.3.3** The FWC is concluded for a period of [*insert*] months with effect from the Effective Date (the date of expiration of the FWC in accordance with this Article I.3.3 or - in case of renewal pursuant to Article I.3.5 - the renewed date of expiration, hereafter referred as the “**Expiration Date**”).

**I.3.4** The Parties must sign any Specific Contractbefore the Expiration Date.

The FWC continues to apply to such Specific Contracts after the Expiration Date. The Services relating to such Specific Contracts must be performed no later than [6 (six)] months after the Expiration Date.

**[I.3.5 Renewal of the FWC**[[12]](#footnote-12)

The FWC is renewed automatically [*complete*] times for [*complete*] months each, under the same terms and conditions, unless either (i) the Contractor receives Formal Notification to the contrary by the Contracting Authority at least [3 (three)] months before the Expiration Date or (ii) the Contracting Authority receives Formal Notification to the contrary by the Contractor at least [6 (six)] months before the Expiration Date. Renewal does not change or postpone any existing obligations.]

## Appointment of the contractor and implementation of the FWC

### Appointment of the Contractor

The Contracting Authority appoints the Contractor for a [single FWC] [multiple FWC in cascade in [*complete*] position] [multiple FWC with reopening of competition between [*complete*] Contractors].

### Period of provision of the Services

The period for the provision of the Services starts to run from the date expressly provided in the Specific Contract or, failing that, on the date on which the Specific Contract is signed by the last Party.

### Implementation of [single] [multiple] FWC [in cascade] [with reopening of competition]

[The FWC is implemented in accordance with this Article I.4.3, as further detailed in this Article 1.4.3 below]

*Option 1: single FWC*

The Contracting Authority orders any of the Services by sending the Contractor a Specific Contract[in paper format] [by e-mail] [via e-PRIOR][[13]](#footnote-13) [via DACC].

Within [*complete*] Working Days, the Contractor must either:

- send back to the Contracting Authority the Specific Contractdulysigned and dated [in paper format] [via e-PRIOR] [via DACC] [via QES (Qualified electronic signature)]; or

- send an explanation of why it cannot accept the order.

If the Contractor [repeatedly] refuses to sign Specific Contracts or [repeatedly] fails to send [them] [it] back on time duly signed, the Contractor may be considered in breach of its obligations under this FWC as set out in Article II.18.1 (c).[[14]](#footnote-14)

[For the sake of clarity, the Parties agree and acknowledge that, for the purpose of this Article I.4.3, the term “repeatedly” means refusal by the Contractor to sign – and/or failure to send back on time – no. [*complete*] Specific Contract(s) or more.]

*Option 2: multiple FWC in cascade*

The FWC is implemented as follows: the Contracting Authority orders any of the Services by sending a Specific Contract[in paper format] [by e-mail] [via e-PRIOR] [via DACC] to the Contractor who is ranked first in the cascade.

Within [*complete*] Working Days, the Contractor must either:

1. send back to the Contracting Authority the Specific Contractdulysigned and dated [in paper format] [via e-PRIOR] [via DACC] [via QES (Qualified electronic signature)]; or
2. send an explanation of why it cannot accept the order.

If the Contractor [repeatedly] refuses to sign Specific Contracts or [repeatedly] fails to send [them] [it] back on time duly signed, the Contractor may be considered in breach of its obligations under this FWC as set out in Article II.18.1 (c).[[15]](#footnote-15)

[For the sake of clarity, the Parties agree and acknowledge that, for the purpose of this Article I.4.3, the term “repeatedly” means refusal by the Contractor to sign – and/or failure to send back on time – no. [*complete*] Specific Contract(s) or more.]

Fusion for Energy shall be entitled to send the Task Order to the next contractor in cascade or any other economic operator selected in accordance with the provisions laid down in the Financial Regulation, in case the Contractor is unavailable.

The Contractor shall be considered ‘unavailable’ without any right to compensation in the following situations:

(a) If the Contractor does not accept the order, or   
(b) In the event of failure to observe the deadlines as set out in this Article, or   
(c) If the Parties cannot agree on the Task Offer, the allocation of resources, price or technical/safety/quality/management/contractual issues after discussions within 30 (thirty) Working Days, or  
(d) If the Contractor is in a situation of Conflict of Interest or Professional Conflict of Interest that may negatively affect the performance of the Specific Contract(see Article II.7), after having given the opportunity to the Contractor to submit its observation

*Option 3: multiple FWC with reopening of competition*

The FWC is implemented as follows: the Contracting Authority orders any of the Services by sending a Request for Services [in paper format] [by e-mail] [via e-PRIOR] [via DACC] to all Contractors.

The Contractors send their specific tenders to the Contracting Authority within [[*complete*] Working Days of receipt] [the time limit indicated in the Request for Services] [in paper format] [by e-mail] [via e-PRIOR] [via DACC].

The Contracting Authority evaluates the specific tenders and selects the most economically advantageous one on the basis of the award criteria set out in the procurement documents (Invitation to tender). When doing so, it takes into account any Conflicting Interests which may negatively affect the Performance of the Specific Contract (see Article II.7). The Contracting Authority awards and sends the Specific Contract to the successful Contractor for its signature.

The Contractor must send back to the Contracting Authority the Specific Contract duly signed and dated [in paper format] [via e-PRIOR] [via DACC] [via QES (Qualified electronic signature)] within [*complete*] Working Days of receipt.

## Prices

### Maximum amount of the FWC and maximum prices

The maximum amount covering all purchases of the Services under this FWC [, including [all renewals] [and] [reimbursement of expenses]] is EUR [*amount in figures and in words*]. However, this does not bind the Contracting Authority to purchase for the maximum amount.

The [maximum][[16]](#footnote-16) prices of the Services are [:] [as listed in Annex C].

### Price revision index

*Option 1: not applicable*

[Price revision is not applicable to this FWC.]

*Option 2: applicable formula*

[Price revision is determined by the formula set out in Article II.20 and using the trend in the harmonised indices of consumer prices (HICP) [*complete*][[17]](#footnote-17) published at <http://ec.europa.eu/eurostat/web/hicp/data/database> under HICP (2015 = 100) - monthly data (index) (prc\_hicp\_midx).]

### Reimbursement of expenses[[18]](#footnote-18)

*Option 1: Not applicable*

[Reimbursement of expenses is not applicable to this FWC. Any expenses incurred by the Contractor in connection with the Implementation of the FWC must be considered as included in the price(s) for the Services provided under this FWC.]

*Option 2: Reimbursement in the form of lump sum*

[The Contracting Authority shall reimburse [the [travel] [subsistence] [accommodation] expenses] which are directly connected with execution of the tasks in the form of a lump-sum agreed in advance by the Parties prior to the expenses being incurred by the Contractor. The relevant criteria and guidelines to be used to determine in advance the lump sum are those indicated in Article II.22. The [maximum] amount of such lump sum and any further criteria used for its calculation – in line with this FWC - shall be indicated in the Specific Contract.][[19]](#footnote-19)

*Option 3: Reimbursement*

[The Contracting Authority shall reimburse the following in accordance with Article II.22:

1. travel, subsistence, accommodation [and shipment expenses][[20]](#footnote-20); and
2. any other expenses provided for in the Technical Specifications.

The total value of expenses may not exceed:

1. [EUR [*amount in figures and in words*] throughout the duration of the FWC including renewals;]
2. [EUR [*amount in figures and in words*] for [each Specific Contract];]
3. [EUR [*amount in figures and in words*] for [*insert maximum price per trip or per type of cost*].]

[The daily subsistence allowance referred to in Article II.22.4 (d) and the accommodation ceiling referred to in Article II.22.4(e) are [EUR [*complete*]] [as listed in Annex [F] (Daily subsistence allowances flat-rate and ceilings for accommodation)] [as listed below].[[21]](#footnote-21)]

[By derogation to Article II.22.3(c), travel by car shall be reimbursed at the rates of EUR [0.22] [0.12] per km. Car rental is not reimbursed.]

F4E reserves the right to change unilaterally Annex F and apply the new rates as published by the European Commission. The new Annex F shall apply to any future specific contract to sign as of the date of the notification made by F4E.

## Payment arrangements[[22]](#footnote-22)

### Pre-financing[[23]](#footnote-23)

*Option 1: Not applicable*

[Pre-financing is not applicable to this FWC.]

*Option 2: Pre-financing applicable*

[Following signature of the Specific Contractby the last Party and its receipt by the Contracting Authority, the Contractor (or leader in the case of a joint tender) may claim a pre-financing payment of [*complete*] % of the price referred to in the relevant Specific Contract. The Contractor (or leader in the case of a joint tender) must send to the Contracting Authority an invoice [in paper format] [via e-PRIOR][[24]](#footnote-24) [via DACC] for the pre-financing payment.

[The Contractor (or leader in the case of a joint tender) must also provide a financial guarantee equal to [*complete*] % of the price of the Specific Contract.][[25]](#footnote-25)

The Contracting Authority must pay the pre-financing within 30 days of receiving the invoice [provided it has received the guarantee].

[Each year, for Specific Contracts over EUR 5 million, the Contractor (or leader in the case of a joint tender) must inform the Contracting Authority by [31 December] [30 November] about the cumulative expenditure incurred under these ongoing Specific Contracts as from the start date of each concerned Specific Contract. This information is required for the Contracting Authority’s accounting purposes.][[26]](#footnote-26)

### Interim payment[s][[27]](#footnote-27)

*Option 1: Not applicable*

[Interim payment is not applicable to this FWC.]

*Option 2: Interim payment(s) applicable*

[1[(a)]. The Contractor (or leader in the case of a joint tender) may claim [an] [a first] interim payment equal to [*complete*] % of the price referred to in the relevant Specific Contractin accordance with Article II.21.6 [minus the amount of the pre-financing payment paid in accordance to Article I.6.1].[[28]](#footnote-28)

The Contractor (or leader in the case of a joint tender) must send an invoice [in paper format] [via e-PRIOR] [via DACC] for the interim payment as provided for in this FWC, including Annex D (Instructions for invoicing), accompanied by the following:

* [*insert relevant progress report or deliverable result or reference to Technical Specifications or specific contract;*]
* [statements of reimbursable expenses in accordance with Article II.22].

***Repeat point 1(with 1(a), 1(b)…) as many times as there are interim payments as well as points 2 to 3 if they change for each interim payment.***

2. The Contracting Authority must approve any submitted documents or deliverables and pay within [30] [60][90][[29]](#footnote-29) days from receipt of the invoice.

3. The Contracting Authority may suspend the time limit for payment specified in point (2.) in accordance with Article II.21.7. Once the suspension is lifted, the Contracting Authority shall give its approval and pay within the remainder of the time-limit indicated in point (2.) unless it rejects partially or fully the submitted documents or deliverables.]

### Payment of the balance

1. The Contractor (or leader in the case of a joint tender) may claim the payment of the balance in accordance with Article II.21.6. [The amount of the pre-financing paid in accordance to Article I.6.1 shall be cleared against the payment of the balance].[[30]](#footnote-30)

The Contractor (or leader in the case of a joint tender) must send an invoice [in paper format] [via e-PRIOR] [via DACC] for payment of the balance due under a Specific Contract, as provided for in this FWC, including Annex D (Instructions for invoicing), accompanied by the following:

* [*insert relevant final progress report or deliverable or reference to Technical Specifications or specific contract*]
* [statements of reimbursable expenses in accordance with Article II.22].

2. The Contracting Authority must approve the submitted documents or deliverables and pay within [30] [60] [90][[31]](#footnote-31) days from receipt of the invoice.

3. The Contracting Authority may suspend the time limit for payment specified in point (2.) in accordance with Article II.21.7. Once the suspension is lifted, the Contracting Authority shall give its approval and pay within the remainder of the time-limit indicated in point (2.) unless it rejects partially or fully the submitted documents or deliverables.

### Performance guarantee[[32]](#footnote-32)

*Option 1: Not applicable*

[Performance guarantee is not applicable to this FWC.]

*Option 2: performance guarantee applicable*

[A performance guarantee constituted by a bank guarantee in accordance with the conditions laid down in Article II.21.5 may be requested for the amount provided in the relevant Specific Contract.]

### Retention money guarantee

*Option 1: Not applicable*

[Retention money guarantee is not applicable to this FWC.]

*Option 2: retention money guarantee applicable*

[A retention money guarantee may be requested for an amount provided in the relevant Specific Contractand constituted by a corresponding deduction on each payment. At the request of the Contractor, and subject to approval by the Contracting Authority, the deduction on payment may be replaced by a bank guarantee in accordance with the conditions laid down in Article II.21.5.]

### Other payments arrangements and value added tax

Payments under the FWC shall be made after the Specific Contract to which it refers comes into force. Payments shall be made only if the Contractor has fulfilled all his contractual obligations by the date on which the invoice is submitted. Payment requests cannot be made if payments for previous Specific Contracts have not been executed as a result of default or negligence of the Contractor.

F4E is, as a rule, exempt from all taxes and duties, including VAT, pursuant to the provisions of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union[[33]](#footnote-33).

In accordance with Article II.19.1, the Contractor shall remain responsible for the proper application of the rules on VAT at the place where is taxable. The Contracting Authority reserves the right to communicate information on the Contract to the Member State in which the Contractor is liable to VAT.

Based on EC Directive 2006/112/EC and on decision 2513 of Spanish Foreign Affairs Ministry published in BOE n° 33 of 7 February 1997, F4E, as an European Communities body, is exempted from value added tax (VAT), for the delivery of goods and services for official use, if the amounts of each transaction are equal or higher than 300.05 €, VAT excluded (751.27 € if related to constructions).

Depending on the country where the Contractor is taxable, the VAT exemption may be direct or indirect:

* If direct exemption applies, the Contracting Authority shall not pay VAT to the Contractor and the latter, to this purpose, shall issue the invoice without applying VAT; or
* If indirect exemption applies, the Contracting Authority shall first pay VAT to the Contractor and subsequently will request reimbursement to the Member State where the Contractor is taxable.[[34]](#footnote-34)

I. In case of the so called direct exemption, invoices presented by the Contractor to F4E, for an amount equal or higher to the above mentioned value, shall apply a 0 % VAT rate and shall indicate the following statement:

1. For local purchases in Spain: “*Exoneración directa del I.V.A. en base a la disposición 2513 del Mtrio. de AA.EE. publicada en el BOE n° 33 del 7 de febrero de 1997, páginas 3917 a 3919*”; and
2. For intracommunity EU purchases: “VAT Exemption / European Union / Article 151 of Council Directive 2006/112/EC”.

F4E will provide the Contractor with a VAT exemption certificate in accordance with the note 125/08 from the “Agencia tributaria” (Spanish tax authorities) dated 25 April 2008 for local purchases in Spain, and with Directive 2006/112/EC – Article 151 and Directive 2008/118/EC – Article 13 for intracommunity EU purchases; [[35]](#footnote-35)

II. In case of indirect exemption, the Contractor shall present their invoices including VAT (VAT rate to be indicated separately), which F4E will recover later on from the Member State involved.

## Bank account

Payments must be made to the Contractor’s (or leader’s in the case of a joint tender) bank account denominated in [EUR] [*insert local currency where the receiving country does not allow transactions in EUR*], identified as follows:

Name of bank: [*complete*]

Full address of branch:[*complete*]

Exact denomination of account holder: [*complete*]

Full account number including bank codes: [*complete*]

[IBAN[[36]](#footnote-36) code:] [*complete*]

Unless otherwise indicated by F4E, any modification of the Contractor’s bank account shall be approved through DACC.

## Communication details

For the purpose of this FWC, communications must be sent to the following addresses:

Contracting authority:

The European Joint Undertaking for the Development of ITER and Fusion Energy

c/Josep Pla 2

Torres Diagonal Litoral

Building B3

08019 Barcelona

Spain

To the attention of: *[name of Responsible Officer]*

E-mail: [*insert functional mailbox*]

Contractor (or leader in the case of a joint tender):

[*Full name*]

[*Function*]

[*Company name*]

[*Full official address*]

To the attention of: *[complete]*

E-mail: [*complete*]

By derogation from this Article, different contact details for the Contracting Authority or the Contractor may be provided in Specific Contracts.

Any communication or document sent, notified or approved through DACC is considered as equivalent to a paper document with a handwritten signature and shall be admissible as evidence in legal proceedings.

## Processing of personal data

**I.9.1 Processing of personal data by the contracting authority**

For the purpose of Article II.9.1:

1. the data controller is [*insert position of the data controller and name of the organisational entity*];
2. the data protection notice is available at *[*<https://______________________>*]*

**I.9.2 Processing of personal data by the Contractor**

*Option 1: Not applicable (no processing)*

[This clause is not applicable to this FWC.][[37]](#footnote-37)

*Option 2: processing applicable*

[For the purpose of Article II.9.2,

1. the subject matter and purpose of the processing of personal data by the Contractor are [*provide a* *concise description of the subject matter and purpose*];
2. The localisation of and access to the personal data processed by the Contractor shall comply with the following[[38]](#footnote-38):
3. the personal data shall only be processed within the territory of [the European Union and the European Economic Area][…] and will not leave that territory;
4. the data shall only be held in data centres located with the territory of [the European Union and the European Economic Area][…];
5. [no access shall be given to such data outside of [the European Union and the European Economic Area][…]] [access to data may be given on a need to know basis only to authorised persons established in a country which has been recognised by the European Commission as providing adequate protection to personal data];
6. the Contractor may not change the location of data processing without the prior written authorisation of the contracting authority;
7. any transfer of personal data under the FWC to third countries or international organisations shall fully comply with the requirements laid down in Chapter V of Regulation (EU)2018/1725[[39]](#footnote-39).]

## Exploitation of the results of the FWC

*Option 1: Not applicable*

[This Article is not applicable to this FWC.][[40]](#footnote-40)

*Option 2: Exploitation of results applicable*

### [Detailed list of modes of exploitation of the Results

For the purposes of Article II.13 of the general conditions, any Results or rights thereon, including copyright and other intellectual or industrial property rights, obtained in implementation of the FWC o performance of the Specific Contract(s), shall be owned solely by the Contracting Authority, which may use, publish, assign or transfer them as it sees fit, without geographical or other limitation.

The Contractor shall authorise F4E to process, use, distribute and publish, for whatever purpose, by whatever means and on whatever medium, any data contained in or relating to the contract, in particular the identity of the Contractor, the subject matter, the duration, the amount paid and the reports. Where personal data is concerned, Article II.9 shall apply.

The use of information obtained by the Contractor in the course of the FWC for purposes other than its performance shall be forbidden, unless the Contracting Authority has specifically given prior written authorisation to the contrary.

In accordance with Article II.13.1 whereby F4E acquires ownership of the Results as defined in this FWC, including the Technical Specifications, these Results may be used for any of the following modes of exploitation:

(a) use for its own purposes:

* making available to the staff of the Contracting Authority;
* making available to the persons and entities working for the Contracting Authority or cooperating with it, including contractors, subcontractors whether legal or natural persons;
* making it available to the other European Union institutions, agencies and bodies, Member States’ institutions;
* installing, uploading, processing;
* arranging, compiling, combining, retrieving;
* copying, reproducing in whole or in part and in unlimited number of copies;
* storage of the original and copies;
* archiving in line with the document management rules applicable to the contracting authority.

(b) distribution to the public in hard copies, in electronic or digital format, on the internet including social networks as a downloadable or non-downloadable file or otherwise in any other form or by any other method;

(c) communication through press information services or public presentation, and broadcasting by any kind of transmission technique;

(d) inclusion in widely accessible databases or indexes, such as via ‘open access’ or ‘open data’ portals, or similar repositories, whether freely accessible or accessible only upon subscription;

(e) modifications by the Contracting Authority or by a third party in the name of the Contracting Authority, including:

* shortening;
* summarising;
* modifying the content, the dimensions;
* making technical changes to the content (necessary correction of technical errors), adding new parts or functionalities, changing functionalities, providing third parties with additional information concerning the Result (e.g. source code) with a view to making modifications;
* addition of new elements, paragraphs, titles, leads, bolds, legend, table of content, summary, graphics, subtitles, sound;
* addition of metadata, for text and data-mining purposes; addition of right-management information; addition of technological protection measures;
* preparation in audio form, preparation as a presentation, animation, pictograms story, slide-show, public presentation;
* extracting a part or dividing into parts;
* incorporating, including by cropping and cutting, the Results or parts thereof in other works, such as on websites and webpages;
* translating, inserting subtitles, dubbing in different language versions:
* English, French, German;
* all official languages of EU;
* languages used within EU;
* languages of candidate countries;

(f) rights to authorise or license the modes of exploitation set out in any of the points (a) to (e) to third parties, provided however that this does not apply to Pre-existing Rights and Pre-existing Materials, if they are only licensed to the Contracting Authority, except as foreseen by Article II.13.2;

(g) other adaptations which the Parties may later agree; in such case, the following rules apply: the Contracting Authority must consult the Contractor. If necessary, the Contractor must in turn seek the agreement of any Creator or other right holder and must reply to the Contracting Authority within one month by providing its agreement, including any suggestions of modifications, free of charge. The Contractor may refuse the intended modification only if a Creator can demonstrate that the intended modification may harm his/her honour or reputation, thereby violating his/her moral rights.

The modes of exploitation may be defined in more details in the Specific Contract.

The list above is in addition to whatever rights already accrue to the Contracting Authority on the basis of existing exceptions in the applicable legislation, such as the copyright exception to ensure the proper performance or reporting of administrative proceedings, in cases where such exceptions apply.

### Licence or transfer of Pre-existing Rights

All Pre-existing Rights incorporated in the Results, if any, are licensed to F4E as set out in Article II.13.2.

### Provision of list of Pre-existing Rights and documentary evidence

In case Pre-existing Rights were incorporated to the Results, the Contractor must provide the Contracting Authority with a list of the Pre-existing Rights as set out in Article II.13.4 together with the delivery of each Result incorporating Pre-existing Rights.

In addition, the Contractor must provide the Contracting Authority with relevant and exhaustive evidence of the acquisition of all the necessary Pre-existing Rights together with a presentation of relevant Result. To this effect, the Contractor must provide the relevant evidence listed in Article II.13.5 as appropriate].[[41]](#footnote-41)

## Termination by F4e for convenience

F4E may, at any time and at its discretion, terminate the FWC and/or any Specific Contract or any part thereof in accordance with this Article I.11.

Any such termination shall be effected by delivery to the Contractor of a Formal Notification sent by registered letter with acknowledgement of receipt. This notice shall specify the extent to which Performance under the FWC or Specific Contract is to be terminated and the effective date of termination.

Upon receipt of a notice under this Article, the Contractor shall discontinue Performance of the FWC and/or Specific Contract, as the case may be, in accordance with the notice and shall take any reasonable steps which are necessary or desirable to terminate performance in a safe and timely manner, as well as minimise the costs, prevent damages and cancel or reduce its commitments in connection with the termination.

F4E shall reimburse the Contractor for those direct costs actually and reasonably incurred in the Implementation of the FWC, if applicable, and claimed in accordance with this Article by the Contractor as a direct result of termination of the FWC, a Specific Contract or of any portion thereof, as well as a cancellation fee corresponding to 3% (three percent) of the remaining payments of any Services that have been explicitly ordered but not yet delivered in accordance with the FWC or Specific Contract.

As promptly as possible and in no event later than 30 (thirty) days after the effective date of termination, the Contractor shall submit to F4E its claim for reimbursement in writing by registered letter with acknowledgement of receipt. Such claim for reimbursement shall include a cost breakdown of unavoidable direct costs reasonably and actually incurred as a result of termination that it is seeking to recover from F4E with supporting evidence.

The amount of reimbursement payable under this Article shall be fixed on the basis of the evidence produced by the Contractor and accepted by F4E. It shall take account of the proportion of the FWC or Specific Contract, as the case may be, completed and accepted by F4E in accordance with the provisions of the FWC, and shall be consistent with this Article. The Contractor hereby expressly waives the right to claim any loss of profit in respect of the uncompleted or outstanding works which were to be performed after the termination date.

F4E shall in no circumstances be liable to pay any sum which, when added to the other sums paid, due or becoming due to the Contractor under the FWC, exceeds the total contract price payable under the FWC.

Within 60 (sixty) days of the date of termination, the Contractor must submit any report, deliverable or Result and any invoice required for Services that were provided before the date of termination. Ownership of all materials, parts and unfinished work paid for by F4E under the provisions of the FWC or Specific Contract shall be vested in or transferred to F4E as soon as they have been paid for.

## Applicable law and settlement of disputes

**I.12.1** TheFWC is governed by Community and European Union law (“**Union law**”), complemented, where necessary, by the national substantive laws of Spain other than its rules of private international law (conflict of laws/renvoi rules).

**I.12.2** The Courts of Barcelona (Spain) have exclusive jurisdiction over any dispute regarding the interpretation, application or validity of the FWC.

## Inter-institutional FWC[[42]](#footnote-42)

*Option 1: Not applicable*

[This Article is not applicable to the FWC.]

*Option 2: Inter-institutional contract applicable*

[**I.13.1** This FWC is inter-institutional. The Lead Contracting Authority acts on its own behalf and on behalf of the bodies listed in the title of the FWC as the contracting authorities, which provided the Lead Contracting Authority with a power of attorney before FWC signature. The Lead Contracting Authority signs the FWC and any amendments on behalf of itself and of all other contracting authorities.

**I.13.2** Each Contracting Authority is responsible for the particular Specific Contracts it awards.

**I.13.3** If the Contractor has a complaint about the conclusion, Performance or Termination of a Specific Contract, the Contractor remains bound by its obligations under the FWC and other Specific Contracts.]

## Liquidated damages[[43]](#footnote-43)

### Delay in delivery

If the Contractor fails to perform its contractual obligations within the applicable time limits set out in this FWC or in the relevant Specific Contracts the Contracting Authority, without prejudice to the other rights and remedies provided in this FWC and by applicable laws, may claim liquidated damages for each day of delay using the following formula:

0.3 x(*V/d*)

where:

V is the price of the relevant purchase or deliverable or Result;

d is the duration specified in the relevant Specific Contract for delivery of the relevant purchase or deliverable or Result or, failing that, the period between the date specified in Article I.4.2 and the date of delivery or performance specified in the relevant Specific Contract, expressed in days.

The procedure under Article II.15 shall apply.

Liquidated damages may be imposed together with a reduction in price under the conditions laid down in Article II.16.

## [Other special conditions[[44]](#footnote-44)

***IMPORTANT: Other special conditions or derogations to the general conditions may be considered. Please liaise with LO in that respect***

**[I.15.[1] Service provided on the premises of the Contracting Authority**[[45]](#footnote-45)

If necessary for Performance of a Specific Contract, the Contracting Authority may give the Personnel of the Contractor access to its premises by means of an access card. The access card remains the property of the Contracting Authority and must be returned to the F4E Security Office [(c/Josep Pla 2 –– Torres Diagonal Litoral, Building B3 – 08019 Barcelona (Spain) – Monday to Friday 8:00 – 18:30)] upon request, upon expiry or in cases where the application conditions are no longer met.

If the access card is not returned on the day it expires, the Contracting Authority may claim liquidated damages of 100 EUR (one hundred Euro) for each day of delay up to a maximum of EUR 1 000 (one thousand Euro). This represents a reasonable estimate of fair compensation for the damage incurred.

Personnel who have access to Contracting Authority’s premises shall be subject to certain F4E’s internal rules and procedures, such as without limitation those related to health & safety in the workplace. The Contractor commits to cause its Personnel to comply with such rules and procedures.]

**[I.15.[2] Stability of Services**

When a change of Personnel is unavoidable, there should be a [*insert number of days*]-day period of adjustment when both the replacement and original Personnel should work side by side for training and transfer of relevant information. The costs of the period of adjustment shall be borne by the Contractor.

In no event shall the Contractor be able to plead a change of Personnel as a reason for not meeting any of its obligations, in particular with regard to deadlines and quality.]

**[I.15.[3] Security**

Contractors working in F4E premises must conform to any internal F4E security rules, including the F4E’s Information Systems Security Policy.

In certain cases, when required by the F4E’s services for security reasons, the Contracting Authority may ask the Contractor to agree to a security clearance of the Personnel involved for the provision of certain services. This will be considered as a specific requirement for a specific project, and not influence the other conditions.

The Contracting Authority may request to the Contractor that all the people working at F4E as part of this Contract sign a confidentiality and non-disclosure agreement.]

**[I.15.[4] Non-disclosure agreements[[46]](#footnote-46)**

In light of the sensitivity of information to which the Personnel will have, or may have, access to in the context of the service provision, and in connection with Article II.8 (Confidentiality), F4E is entitled to request to the Contractor - and/or directly to the Personnel accessing to Confidential Information, as the case may be – which shall have to accept, signature of specific non-disclosure agreement with the Contracting Authority, which shall be signed upon signature of the relevant Specific Contract(s), with a text substantially consistent with Annex [ ] (NDA template)]

**[I.15.[5]** **Limitation of liability**

By partially derogating to the first paragraph of Article II.6.3, the Contractor is liable for any loss or damage caused to the Contracting Authority during or as a consequence of Implementation of the FWC, including in the event of subcontracting, only up to an amount not exceeding [*complete*] the total amount of the relevant Specific Contract.]

[**I.15.[6] Joint and several liability between the Contractor and other entities**

The Contractor and [*name of the entity/ies*] are jointly and severally liable for the Performance of the FWC and for any related Specific Contract.][[47]](#footnote-47)

# GENERAL CONDITIONS

## Independent contractor – Personnel of the Contractor

The Contractor is, and shall act as, an independent contractor performing the FWC and related Specific Contract(s). The Contract does not create any agency, partnership, joint venture or other joint relationship between the Contracting Authority and the Contractor.

Personnel is, and shall remain during the Performance of the Specific Contract, Personnel of the Contractor and (a) shall not have any direct contractual relationship with F4E, (b) shall not have direct power to represent or commit the Contracting Authority and (c) shall not be allowed to manage the Contracting Authority’s Personnel.

The Contractor will have sole responsibility for complying with all legal obligations incumbent on it, notably those arising from employment law, tax law and social security legislation regarding its Personnel. The Contractor will be responsible for the Personnel carrying out the work, who is not, and may not be, placed in a position of dependency in relation to F4E.

The Contractor is responsible for, and shall have to duly comply with, applicable laws regarding Personnel, with particular reference to labour law applicable in the country where the Contractor is established but also to mandatory labour law provisions applicable in the country where Personnel carry out the activity (if different from the country where the Contractor is established). The mentioned applicable laws include, but are not limited to, laws relevant to salaries and qualifications, social contributions, health & safety in the workplace, risk prevention and fitness to work, in relation to its Personnel and, if applicable, also to staff of subcontractors or F4E. Upon request of the Contracting Authority, the Contractor shall have to provide evidence on the fulfilment of any related applicable laws.

## Roles and responsibilities in the event of a joint tender

In the event of a joint tender submitted by a group of economic operators and where the group does not have legal personality or legal capacity, one member of the group is appointed as leader of the group.

## Severability

Each provision of this FWC is severable and distinct from the others. If a provision is or becomes illegal, invalid or unenforceable to any extent, it must be severed from the remainder of the FWC. This does not affect the legality, validity or enforceability of any other provisions of the FWC, which continue in full force and effect. The illegal, invalid or unenforceable provision must be replaced by a legal, valid and enforceable substitute provision which corresponds as closely as possible with the actual intent of the Parties under the illegal, invalid or unenforceable provision. The replacement of such a provision must be made in accordance with Article II.11. The FWC must be interpreted as if it had contained the substitute provision as from its entry into force.

## Provision of services

**II.4.1**  Signature of the FWC does not guarantee any actual purchase. The Contracting Authority is bound only by Specific Contracts implementing the FWC. If the Contractor has a complaint about the conclusion, performance or termination of a Specific Contract, the Contractor remains bound by its obligations under the FWC, such Specific Contract and any other Specific Contracts.

**II.4.2** The Contractor must provide Services of high quality standards, in accordance with the state of the art in the industry and the provisions of this FWC, in particular the Technical Specifications and the terms of its tender. Where the Contracting Authority has the right to make modifications to the result*s*, they must be delivered in a format and with the necessary information which effectively allow such modifications to be made in a convenient manner.

**II.4.3** The Contractor must comply with the minimum requirements provided for in the Technical Specifications. This includes compliance with applicable obligations under environmental, social and labour law established by Union Law, national law and collective agreements or by the international environmental, social and labour law provisions listed in Annex X to Directive 2014/24/EU[[48]](#footnote-48), compliance with data protection obligations resulting from Regulation (EU) 2016/679[[49]](#footnote-49) and Regulation (EU) 2018/1725[[50]](#footnote-50).

**II.4.4** The Contractor must obtain any permit or licence required in the State where the Services are to be provided.

**II.4.5** All periods specified in the FWC are calculated in calendar days, unless otherwise specified.

**II.4.6** The Contractor must not present itself as a representative of the Contracting Authority and must inform third parties that it is not part of the European public service.

**II.4.7** The Contractor is responsible for the Personnel who carry out the Services and exercises its authority over its Personnel without interference by the Contracting Authority. The Contractor must inform its Personnel that:

1. they may not accept any direct instructions from the Contracting Authority; and
2. their participation in providing the Services does not result in any employment or contractual relationship with the Contracting Authority.

The Contractor undertakes to indemnify and hold harmless the Contracting Authority – for the whole amount of costs incurred - for any claim towards the latter brought by the Contractor’s Personnel invoking any right arising from, or in connection with, the contractual relationship between the Contractor and the Contracting Authority.

**II.4.8** The Contractor must ensure that the Personnelimplementing the FWC and any future replacement Personnel possess the professional qualifications and experience required to provide the Services, as the case may be on the basis of the selection criteria set out in the procurement documents (Invitation to tender).

**II.4.9** At the Contracting Authority’s reasoned request, the Contractor must replace any member of Personnel who:

1. does not have the expertise required to provide the Services; and/or
2. has caused disruption at the premises of the Contracting Authority.

The Contractor bears the cost of replacing its Personnel and is responsible for any delay in providing the Services resulting from the replacement of Personnel.

**II.4.10** The Contractor must record and report to the Contracting Authority any problem that affects its ability to provide the Services. The report must describe the problem, state when it started and what action the Contractor is taking to resolve it.

**II.4.11** The Contractor must immediately inform the Contracting Authority of any changes in the exclusion situations as declared, according to Article 137 (1) of Regulation (EU) 2018/1046.

## Communication between the parties

### Form and means of communication

Any communication of information, notices or documents under the FWC must:

1. be made in writing in paper or electronic format in the language of the contract;
2. bear the FWC number and, if applicable, the Specific Contractnumber;
3. be made using the relevant communication details set out in Article I.8; and
4. be sent by mail, email or, for the documents specified in the special conditions (if any), via e-PRIOR.

If a Party requests written confirmation of an e-mail within a reasonable time, the other Party must provide an original signed paper version of the communication as soon as possible.

The Parties agree that any communication made by email in accordance with Articles II.5.1, II.5.2 and I.8 has full legal effect and is admissible as evidence in judicial proceedings.

Without prejudice to the above, communication through DACC is considered valid and equivalent to written communication.

### Date of communications by mail and email

Any communication is deemed to have been made when the receiving Party receives it, unless this FWC contract refers to the date when the communication was sent.

E-mail is deemed to have been received by the receiving Party on the day of dispatch of that e-mail, provided that it is sent to the e-mail address indicated in Article I.8. The sending Party must be able to prove the date of dispatch. In the event that the sending Party receives a non-delivery report, it must make every effort to ensure that the other Party actually receives the communication by email or mail. In such a case, the sending Party is not held in breach of its obligation to send such communication within a specified deadline.

Mail sent to the Contracting Authority is deemed to have been received by the Contracting Authority on the date on which the department responsible referred to in Article I.8 registers it.

Formal Notifications are considered to have been received by the receiving Party on the date of receipt indicated in the proof received by the sending Party that the message was delivered to the specified recipient.

### Submission of e-documents via e-PRIOR

1. If provided for in the special conditions, the exchange of electronic documents (e-documents) such as Requests for Services, Specific Contracts and invoices between the Parties is automated through the use of the e-PRIOR platform. This platform provides two possibilities for such exchanges: either through web services (machine-to-machine connection) or through a web application (the Supplier Portal).
2. The Contracting Authority takes the necessary measures to implement and maintain electronic systems that enable the Supplier Portal to be used effectively.
3. In the case of machine-to-machine connection, a direct connection is established between the Parties’ Back Offices. In this case, the Parties take the measures necessary on their side to implement and maintain electronic systems that enable the machine-to-machine connection to be used effectively. The electronic systems are specified in the Interface Control Document. The Contractor (or leader in the case of a joint tender) must take the necessary technical measures to set up a machine-to-machine connection and at its own cost.
4. If communication via the Supplier Portal or via the web services (machine-to-machine connection) is hindered by factors beyond the control of one Party, it must Notify the other immediately and the Parties must take the necessary measures to restore this communication.
5. If it is impossible to restore the communication within two Working Days, one Party must Notify the other that alternative means of communication specified in Article II.5.1 will be used until the Supplier Portal or the machine-to-machine connection is restored.
6. When a change in the Interface Control Document requires adaptations, the Contractor (or leader in the case of a joint tender) has up to six months from receipt of the Notification to implement this change. This period can be shortened by mutual agreement of the Parties. This period does not apply to urgent measures required by the security policy of the Contracting Authority to ensure integrity, confidentiality and non-repudiation of information and the availability of e-PRIOR, which must be applied immediately.

### Validity and date of e-documents

1. The Parties agree that any e-document, including related attachments exchanged via e-PRIOR:
2. is considered as equivalent to a paper document;
3. is deemed to be the original of the document;
4. is legally binding on the Parties once an e-PRIOR authorised person has performed the ‘sign’ action in e-PRIOR and has full legal effect; and
5. constitutes evidence of the information contained in it and is admissible as evidence in judicial proceedings.
6. The Parties expressly waive any rights to contest the validity of such a document solely on the grounds that communications between the Parties occurred through e-PRIOR or that the document has been signed through e-PRIOR. If a direct connection is established between the Parties’ Back Offices to allow electronic transfer of documents, the Parties agree that an e-document, sent as mentioned in the Interface Control Document, qualifies as an EDI Message.
7. If the e-document is dispatched through the Supplier Portal, it is deemed to have been legally issued or sent when the Contractor (or leader in the case of a joint tender) is able to successfully submit the e-document without any error messages. The generated PDF and XML document for the e-document are considered as a proof of receipt by the Contracting Authority.
8. In the event that an e-document is dispatched using a direct connection established between the Parties’ Back Offices, the e-document is deemed to have been legally issued or sent when its status is ‘received’ as defined in the Interface Control Document.
9. When using the Supplier Portal, the Contractor (or leader in the case of a joint tender) can download the PDF or XML message for each e-document for one year after submission. After this period, copies of the e-documents are no longer available for automatic download from the Supplier Portal.

### Authorised persons in e-PRIOR

The Contractor submits a request for each person who needs to be assigned the role of ‘user’ in e-PRIOR. These persons are identified by means of the European Communication Authentication Service (ECAS) and authorised to access and perform actions in e-PRIOR within the permissions of the user roles that the Contracting Authority has assigned to them.

User roles enabling these e-PRIOR authorised persons to sign legally binding documents such as specific tenders or Specific Contracts are granted only upon submission of supporting documents proving that the authorised person is empowered to act as a legal representative of the Contractor.

## Liability

**II.6.1** The Contracting Authority is not liable for any direct or indirect damage or loss caused by the Contractor, including any direct or indirect damage or loss to third parties during or as a consequence of Implementation of the FWC.

**II.6.2** If required by the relevant applicable legislation,the Contractor must take out an insurance policy against risks and damage or loss relating to the Implementation of the FWC. It must also take out supplementary insurance as reasonably required by standard practice in the industry. Upon request, the Contractor must provide evidence of insurance coverage to the Contracting Authority.

**II.6.3** The Contractor is liable for any loss or damage caused to the Contracting Authority during or as a consequence of Implementation of the FWC, including in the event of subcontracting, but only up to an amount not exceeding three times the total amount of the relevant Specific Contract. However, in case of (i) damage or loss caused by the gross negligence or wilful misconduct of the Contractor, its Personnel or its subcontractors (including their Personnel), (ii) personal injuries or death caused by the Contractor, its Personnel or its subcontractors (including their Personnel) and/or (iii) damage or loss resulting from an infringement of intellectual property rights of a third party, then the Contractor will be liable for the whole amount of the damage or loss.

**II.6.4** If a third party brings any action against the Contracting Authority in connection with the Implementation of the FWC, including any action for alleged breach of intellectual property rights, the Contractor must assist the Contracting Authority in the legal proceedings, including by intervening in support of the Contracting Authority upon request.   
If the Contracting Authority’s liability towards the third party is established and such liability is caused by the Contractor, its Personnel or subcontractors during, or as a consequence of, the Implementation of the FWC, then the Contractor must indemnify and hold F4E harmless for the whole amount of damages and costs incurred by the latter.

**II.6.5** If the Contractor is composed of two or more economic operators, which submitted a joint tender (e.g., they are members of a consortium or of another entity not having legal personality, they are all jointly and severally liable to the Contracting Authority for the Implementation of the FWC.

**II.6.6** Notwithstanding anything to the contrary in this FWC, the Contracting Authority is not liable for any loss or damage caused to the Contractor during or as a consequence of Implementation of the FWC, unless the loss or damage was caused by wilful misconduct or gross negligence of the Contracting Authority.

## Conflict of interest and professional conflicting interests

**II.7.1** The Contractor must take all the necessary measures to prevent any situation of Conflict of Interest or Professional Conflicting Interest.

**II.7.2** The Contractor must Notify the Contracting Authority in writing as soon as possible of any situation that could constitute a Conflict of Interest or a Professional Conflicting Interest during the Implementation of the FWC. The Contractor must immediately take action to rectify the situation.

The Contracting Authority may do any of the following:

1. verify that the Contractor’s action is appropriate;
2. require the Contractor to take further action within a specified deadline;
3. decide not to award a Specific Contractto the Contractor.

**II.7.3** The Contractor must pass on all the relevant obligations in writing to:

1. its Personnel;
2. any natural person with the power to represent it or take decisions on its behalf; and
3. third parties involved in the Implementation of the FWC, including subcontractors.

The Contractor must also ensure that the persons referred to above are not placed in a situation which could give rise to Conflicts of Interest.

**II.7.4** Without prejudice to the other provisions of this Article II.7,the Contractor represents and warrants that it has not granted and will not grant, has not sought and will not seek, has not attempted and will not attempt, to obtain and has not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, when such advantage constitutes an illegal practice or involves corruption, either directly or indirectly, in so far as it serves as an incentive or reward relating to the Implementation of the FWC.

## Confidentiality

**II.8.1.** The Contracting Authority and the Contractor must treat with confidentiality any information or documents, in any format, disclosed in writing or orally, relating to the Implementation of the FWC and identified in writing as confidential.

**II.8.2.** The Contractor must:

(a) not use Confidential Information or Documents for any purpose other than to perform its obligations under the FWC or a Specific Contractwithout the prior written agreement of the other Party;

(b) ensure the protection of such Confidential Information or Documents with the same level of protection as its own Confidential Information or Documents and in any case with due diligence;

(c) not disclose, directly or indirectly, Confidential Information or Documents to third parties without the prior written agreement of the Contracting Authority.

**II.8.3** The confidentiality obligations set out in this Article are binding on the Contracting Authority and the Contractor during the Implementation of the FWC and, after its expiry or termination, for a period of 5 (five) years as from the date of the payment of the balance and, in any case, for as long as the information or documents remain confidential, unless:

(a) the disclosing Party agrees to release the receiving Party from the confidentiality obligation earlier;

(b) the Confidential Information or Documents become public through other means than a breach of the confidentiality obligation;

(c) the applicable law requires the disclosure of the Confidential Information or Documents.

For the sake of clarity it is agreed and understood that any information or document for which the relevant confidentiality obligation has a duration exceeding the 5 years period indicated above shall have to bear specific reference of its extended duration.

**II.8.4** The Contractor must obtain from any natural person with the power to represent it or take decisions on its behalf, as well as from Personnel or third parties involved in the Implementation of the FWC*,* a commitment that they will comply with this Article. At the request of the Contracting Authority, the Contractor must provide a document providing evidence of this commitment.

## Processing of personal data

**II.9.1 Processing of personal data by the Contracting Authority**

Any personal data included in or relating to the FWC, including its implementation, shall be processed in accordance with Regulation (EU) 2018/1725. Such data shall be processed solely for the purposes of the implementation, management and monitoring of the FWC by the data controller.

The Contractor or any other person whose personal data is processed by the data controller in relation to this FWC has specific rights as a data subject under Chapter III (Articles 14-25) of Regulation (EU) 2018/1725, in particular the right to access, rectify or erase their personal data and the right to restrict or, where applicable, the right to object to processing or the right to data portability.

Should the Contractor or any other person whose personal data is processed in relation to this FWC have any queries concerning the processing of its personal data, it shall address itself to the data controller. They may also address themselves to the Data Protection Officer of the data controller. They have the right to lodge a complaint at any time to the European Data Protection Supervisor.

Details concerning the processing of personal data are available in the data protection notice referred to in Article I.9.

**II.9.2 Processing of personal data by the Contractor**

The processing of personal data by the Contractor shall meet the requirements of Regulation (EU) 2018/1725 and be processed solely for the purposes set out by the controller.

The Contractor shall assist the controller for the fulfilment of the controller’s obligation to respond to requests for exercising rights of person whose personal data is processed in relation to this FWC as laid down in Chapter III (Articles 14-25) of Regulation (EU) 2018/1725. The Contractor shall inform without delay the controller about such requests.

The Contractor may act only on documented written instructions and under the supervision of the controller, in particular with regard to the purposes of the processing, the categories of data that may be processed, the recipients of the data and the means by which the data subject may exercise its rights.

The Contractor shall grant Personnel access to the data to the extent strictly necessary for the implementation, management and monitoring of the FWC. The Contractor must ensure that Personnel authorised to process personal data has committed itself to confidentiality or is under appropriate statutory obligation of confidentiality in accordance with the provisions of Article II.8.

The Contractor shall adopt appropriate technical and organisational security measures, giving due regard to the risks inherent in the processing and to the nature, scope, context and purposes of processing, in order to ensure, in particular, as appropriate:

1. the pseudonymisation and encryption of personal data;
2. the ability to ensure the ongoing confidentiality, integrity, availability and resilience of processing systems and services;
3. the ability to restore the availability and access to personal data in a timely manner in the event of a physical or technical incident;
4. a process for regularly testing, assessing and evaluating the effectiveness of technical and organisational measures for ensuring the security of the processing;
5. measures to protect personal data from accidental or unlawful destruction, loss, alteration, unauthorised disclosure of or access to personal data transmitted, stored or otherwise processed.

The Contractor shall Notify relevant personal data breaches to the controller without undue delay and at the latest within 48 hours after the Contractor becomes aware of the breach. In such cases, the Contractor shall provide the controller with at least the following information:

1. nature of the personal data breach including where possible, the categories and approximate number of data subjects concerned and the categories and approximate number of personal data records concerned;
2. likely consequences of the breach;
3. measures taken or proposed to be taken to address the breach, including, where appropriate, measures to mitigate its possible adverse effects.

The Contractor shall immediately inform the data controller if, in its opinion, an instruction infringes Regulation (EU) 2018/1725, Regulation (EU) 2016/679, or other Union Law or Member State data protection provisions as referred to in this FWC.

The Contractor shall assist the controller for the fulfilment of its obligations pursuant to Article 33 to 41 under Regulation (EU) 2018/1725 to:

1. ensure compliance with its data protection obligations regarding the security of the processing, and the confidentiality of electronic communications and directories of users;
2. Notify a personal data breach to the European Data Protection Supervisor;
3. communicate a personal data breach without undue delay to the data subject, where applicable;
4. carry out data protection impact assessments and prior consultations as necessary.

The Contractor shall maintain a record of all data processing operations carried on behalf of the controller, transfers of personal data, security breaches, responses to requests for exercising rights of people whose personal data is processed and requests for access to personal data by third parties.

The Contracting Authority is subject to Protocol 7 of the Treaty on the Functioning of the European Union on the privileges and immunities of the European Union, particularly as regards the inviolability of archives (including the physical location of data and services as set out in Article I.9.2) and data security, which includes personal data held on behalf of the contracting authority in the premises of the Contractor or subcontractor.

The Contractor shall Notify the Contracting Authority without delay of any legally binding request for disclosure of the personal data processed on behalf of the Contracting Authority made by any national public authority, including an authority from a third country. The Contractor may not give such access without the prior written authorisation of the Contracting Authority.

The duration of processing of personal data by the Contractor will not exceed the period referred to in Article II.24.2. Upon expiry of this period, the Contractor shall, at the choice of the controller, return, without any undue delay in a commonly agreed format, all personal data processed on behalf of the controller and the copies thereof or shall effectively delete all personal data unless EU or national law requires a longer storage of personal data.

For the purpose of Article II.10, if part or all of the processing of personal data is subcontracted to a third party, the Contractor shall pass on the obligations referred to in Articles I.9.2 and II.9.2 in writing to those parties, including subcontractors. At the request of the contracting authority, the Contractor shall provide a document providing evidence of this commitment.

## Subcontracting

**II.10.1** The Contractor must not subcontract and have the FWC implemented by third parties beyond the third parties already mentioned in its tender without prior written authorisation from the Contracting Authority.

**II.10.2** Even if the Contracting Authority authorises subcontracting, the Contractor remains bound by its contractual obligations and is solely responsible for the Implementation of the FWC.

**II.10.3** The Contractor must ensure that the subcontract does not affect the rights of the Contracting Authority under this FWC, such as, without limitation, those under Articles II.8, II.13 and II.24.

**II.10.4** The Contracting Authority may request the Contractor to replace a subcontractor found to be in a situation provided for in points (d) and (e) of Article II.18.1.

**II.10.5** Save as provided by mandatory law, under no circumstance will the Contracting Authority be responsible or obliged to pay any sum to any subcontractors or to any of its employees and the Contractor undertakes to indemnify and hold fully harmless the Contracting Authority for any claim towards the latter in that respect.

## Amendments

**II.11.1** Any amendment to the FWC or a Specific Contract must be made in writing before all contractual obligations have been fulfilled. A Specific Contractdoes not constitute an amendment to the FWC.

**II.11.2** Any amendment must not make changes to the FWC or a Specific Contractthat might alter the initial conditions of the procurement procedure or result in unequal treatment of tenderers or contractors.

**II.11.3** Unless otherwise instructed by F4E, amendments are processed in DACC. An electronic signature provided in DACC, in accordance with the rules defined in the FWC, is valid and binding for the purpose of this Article.

## Assignment

**II.12.1** The Contractor must not assign any of the rights and obligations arising from the FWC, including claims for payments or factoring, without prior written authorisation from the Contracting Authority. In such cases, the Contractor must provide the Contracting Authority with the identity of the intended assignee.

**II.12.2** Any right or obligation assigned by the Contractor without authorisation is not enforceable against the Contracting Authority.

## Intellectual property rights

### Ownership of the rights in the Results

F4E acquires irrevocably worldwide ownership of the Results and of all intellectual property rights on the newly created materials produced specifically for the Contracting Authority under the FWC and incorporated in the Results, without prejudice however to the rules applying to Pre-existing Rights on Pre-existing Materials, as per Article II.13.2.

The intellectual property rights so acquired include any rights, such as copyright and other intellectual or industrial property rights, to any of the Results and in all technological solutions and information created or produced by the Contractor or by its subcontractor in Implementation of the FWC. The Contracting Authority may exploit and use the acquired rights as stipulated in this FWC. F4E acquires all the rights as from the moment the Contractor has created the Results.

The payment of the price includes any fees payable to the Contractor about the acquisition of ownership of rights by F4E including for all modes of exploitation and of use of the Results.

### Licensing rights on Pre-existing Materials

Unless provided otherwise in the special conditions, F4E does not acquire ownership of Pre-existing Rights under this FWC.

The Contractor licenses the Pre-existing Rights on a royalty-free, non-exclusive and irrevocable basis to F4E, which may use the Pre-existing Materials for all the modes of exploitation set out in this FWC or in Specific Contracts. Unless otherwise agreed, the licence is non-transferable and cannot be sub-licensed, except as provided hereafter:

(a) the Pre-existing Rights can be sub-licensed by the Contracting Authority to persons and entities working for it or cooperating with it, including contractors and subcontractors, whether legal or natural persons, but only for the purpose of their mission for F4E;

(b) if the Result is a "document" such as a report or a study, and it is meant to be published, the existence of Pre-existing Materials in the Result may not prevent the publication of the document, its translation or its "reuse", it being understood however that the "reuse" may only be made of the Result as a whole and not of the Pre-existing Materials taken separately from the Result; for the sake of this provision, "reuse" and "document" have the meaning given by the Commission Decision of 12 December 2011 on the reuse of Commission documents (2011/833/EU).

All Pre-existing Rights are licensed to F4E from the moment the Results are delivered and approved by the Contracting Authority.

The licensing of Pre-existing Rights to F4E under this FWC covers all territories worldwide and is valid for the duration of intellectual property rights protection.

The payment of the price as set out in the Specific Contracts is deemed to also include any fees payable to the Contractor in relation to the licensing of Pre-existing Rights to F4E, including for all forms of exploitation and of use of the Results.

Where Implementation of the FWC requires that the Contractor uses Pre-existing Materials belonging to the Contracting Authority, the Contracting Authority may request that the Contractor signs an adequate licence agreement. Such use by the Contractor will not entail any transfer of rights to the Contractor and is limited to the needs of this FWC.

### Exclusive rights

F4E acquires the following exclusive rights:

1. reproduction: the right to authorise or prohibit direct or indirect, temporary or permanent reproduction of the Results by any means (mechanical, digital or other) and in any form, in whole or in part;
2. communication to the public: the exclusive right to authorise or prohibit any display, performance or communication to the public, by wire or wireless means, including the making available to the public of the Results in such a way that members of the public may access them from a place and at a time individually chosen by them; this also includes the communication on Internet and broadcasting by cable or by satellite;
3. distribution: the exclusive right to authorise or prohibit any form of distribution of Results or copies of the Results to the public, by sale or otherwise;
4. rental: the exclusive right to authorise or prohibit rental or lending of the Results or of copies of the Results;
5. adaptation: the exclusive right to authorise or prohibit any modification of the Results;
6. translation: the exclusive right to authorise or prohibit any translation, adaptation, arrangement, creation of derivative works based on the Results, and any other alteration of the Results, subject to the respect of moral rights of authors, where applicable;
7. where the Results are or include a database: the exclusive right to authorise or prohibit the extraction of all or a substantial part of the contents of the database to another medium by any means or in any form; and the exclusive right to authorise or prohibit the re-utilization of all or a substantial part of the contents of the database by the distribution of copies, by renting, by on-line or other forms of transmission;
8. where the Results are or include a patentable subject-matter: the right to register them as a patent and to further exploit such patent to the fullest extent;
9. where the Results are or include logos or subject-matter which could be registered as a trademark: the right to register such logo or subject-matter as a trademark and to further exploit and use it;
10. where the Results are or include know-how: the right to use such know-how as is necessary to make use of the Results to the full extent provided for by this FWC, and the right to make it available to contractors or subcontractors acting on behalf of the Contracting Authority, subject to their signing of adequate confidentiality undertakings where necessary;
11. where the Results are documents:

the right to authorise the reuse of the documents in conformity with the Commission Decision of 12 December 2011 on the reuse of Commission documents (2011/833/EU), to the extent it is applicable and the documents fall within its scope and are not excluded by any of its provisions; for the sake of this provision, ‘reuse’ and ‘document’ have the meaning given to them by this Decision;

the right to store and archive the Results in line with the document management rules applicable to the Contracting Authority, including digitisation or converting the format for preservation or new use purposes;

1. where the Results are or incorporate software, including source code, object code and, where relevant, documentation, preparatory materials and manuals, in addition to the other rights mentioned in this Article:

end-user rights, for all uses by the contracting authority or by subcontractors which Result from this FWC and from the intention of the Parties;

the rights to receive both the source code and the object code;

1. the right to license to third parties any of the exclusive rights or of the modes of exploitation set out in this FWC; however, for Pre-existing Materials which are only licensed to the Contracting Authority, the right to sub-license does not apply, except in the two cases foreseen by Article II.13.2.
2. to the extent that the Contractor may invoke moral rights, the right for the Contracting Authority, except where otherwise provided in this FWC, to publish the Results with or without mentioning the Creator(s)’ name(s), and the right to decide when and whether the Results may be disclosed and published.

The Contractor warrants that the exclusive rights and the modes of exploitation may be exercised by F4E on all parts of the Results, be it via a transfer of ownership of the rights, on those parts which were specifically created by the Contractor or via a licence of the Pre-existing Rights, on those parts consisting of Pre-existing Materials.

Where Pre-existing Materials are inserted in the Results, the Contracting Authority may accept reasonable restrictions impacting on the above list, provided that the said materials are easily identifiable and separable from the rest, that they do not correspond to substantial elements of the Results, and that, should the need arise, satisfactory replacement solutions exist, at no additional costs to the Contracting Authority. In such case, the Contractor will have to clearly inform the Contracting Authority before making such choice and the Contracting Authority has the right to refuse it.

### Identification of Pre-existing Rights

When delivering the Results, the Contractor must warrant that, for any use that the Contracting Authority may envisage within the limits set in this FWC, the newly created parts and the Pre-existing Material incorporated in the Results are free of claims from Creators or from any third parties and all the necessary Pre-existing Rights have been obtained or licensed.

To that effect, the Contractor must identify, when delivering each Result, the Pre-existing Rights to each Result of this FWC or parts thereof, including identification of the rights’ owners.

### Evidence of granting of Pre-existing Rights

Upon request by the Contracting Authority, the Contractor must, in addition to the list mentioned under Article II.13.4, provide evidence that it has the ownership or the right to use all the listed Pre-existing Rights, except for the rights owned or licensed by F4E. The Contracting Authority may request this evidence even after the end of this FWC.

This provision also applies to image rights and sound recordings.

This evidence may refer, for example, to rights to: parts of other documents, images, graphs, sounds, music, tables, data, software, technical inventions, know-how, IT development tools, routines, subroutines or other programs (‘background technology’), concepts, designs, installations or pieces of art, data, source or background materials or any other parts of external origin.

This evidence must include, as appropriate:

1. the name and version number of a software product;
2. the full identification of the work and its author, developer, Creator, translator, data entry person, graphic designer, publisher, editor, photographer, producer;
3. a copy of the licence to use the product or of the agreement granting the relevant rights to the Contractor or a reference to this licence;
4. a copy of the agreement or extract from the employment contract granting the relevant rights to the Contractor where parts of the Results were created by its Personnel;
5. the text of the disclaimer notice if any.

Provision of evidence does not release the Contractor from its responsibilities if it is found that it does not hold the necessary rights, regardless of when and by whom this fact is revealed.

The Contractor also warrants that it possesses the relevant rights or powers to execute the transfer and that it has paid or has verified payment of all due fees including fees due to collecting societies, related to the final Results.

### Quotation of works in the Result

In the Result, the Contractor must clearly point out all quotations of existing works. The complete reference should include as appropriate, the following: name of the author, title of the work, date and place of publication, date of creation, address of publication on the internet, number, volume and other information that allows the origin to be easily identified.

### Moral rights of Creators

By delivering the Results, the Contractor warrants that the Creators will not object to the following on the basis of their moral rights under copyright:

1. that their names be mentioned or not mentioned when the Results are presented to the public;
2. that the Results be divulged or not after they have been delivered in their final version to the Contracting Authority;
3. that the Results be adapted, provided that this is done in a manner which is not prejudicial to the Creator’s honour or reputation.

If moral rights on parts of the Results protected by copyright may exist, the Contractor must obtain the consent of Creators regarding the granting or waiver of the relevant moral rights in accordance with the applicable legal provisions and be ready to provide documentary evidence upon request.

### Image rights and sound recordings

If natural persons appear in a Result or their voice or any other private element is recorded in a recognisable manner, the Contractor must obtain a statement by these persons (or, in the case of minors, by the persons exercising parental authority) giving their permission for the described use of their image, voice or private element and, on request, submit a copy of the permission to the Contracting Authority. The Contractor must take the necessary measures to obtain such consent in accordance with the applicable legal provisions.

### Copyright notice for Pre-existing Rights

When the Contractor retains Pre-existing Rights on parts of the Results, reference must be inserted to that effect when the Result is used as set out in Article I.10.1, with the following disclaimer: ‘© — year — Fusion for Energy. All rights reserved. Certain parts are licensed under conditions to the EU’, or with any other equivalent disclaimer as the Contracting Authority may consider best appropriate, or as the Parties may agree on a case-by-case basis. This does not apply where inserting such reference would be impossible, notably for practical reasons.

### Visibility of F4E funding and disclaimer

When making use of the Results, the Contractor must declare that they have been produced under a contract with F4E and that the opinions expressed are those of the Contractor only and do not represent the Contracting Authority’s official position. The Contracting Authority may waive this obligation in writing or provide the text of the disclaimer.

## Force majeure

**II.14.1** If a Party is affected by Force Majeure, it must immediately Notify the other Party, stating the nature of the circumstances, their likely duration and foreseeable effects.

**II.14.2** A Party is not liable for any delay or failure to perform its obligations under the FWC if that delay or failure is a result of Force Majeure. If the Contractor is unable to fulfil its contractual obligations owing to Force Majeure, it has the right to remuneration only for the Services actually provided.

**II.14.3** The Parties must take all necessary measures to limit any damage due to Force Majeure.

## Liquidated damages - Procedure

**II.15.1** **Procedure**

The Contracting Authority must Formally Notify the Contractor of its intention to apply liquidated damages and the corresponding calculated amount.

The Contractor has 30 days following the date of receipt to submit observations. Failing that, the decision becomes enforceable the day after the time limit for submitting observations has elapsed.

If the Contractor submits observations, the Contracting Authority, taking into account the relevant observations, must Notify the Contractor:

(a) of the withdrawal of its intention to apply liquidated damages; or

(b) of its final decision to apply liquidated damages and the corresponding amount.

**II.15.2 Nature of liquidated damages**

The Parties expressly acknowledge and agree that any amount payable under this Article II.15 is not a penalty and represents a reasonable estimate of fair compensation for the damage incurred due to failure to provide the Services within the applicable time limits set out in this FWC.

**II.15.3 Claims and liability**

Any claim for liquidated damages does not affect the Contractor’s actual or potential liability or the Contracting Authority’s rights under Article II.18.

## Reduction in price[[51]](#footnote-51)

### Quality standards

If the Contractor fails to provide the service in accordance with the FWC or a Specific Contract (‘unperformed obligations’) or if it fails to provide the service in accordance with the expected quality levels specified in the Technical Specifications (‘low quality delivery’), the Contracting Authority may reduce or recover payments proportionally to the seriousness of the unperformed obligations or low quality delivery. This includes in particular cases where the Contracting Authority cannot approve a Result, report or deliverable as defined in Article I.6 after the Contractor has submitted the required additional information, correction or new version.

A reduction in price may be imposed together with liquidated damages under the conditions of Articles I.14 and II.15.

### Procedure

The Contracting Authority must Formally Notify the Contractor of its intention to reduce payment and the corresponding calculated amount.

The Contractor has 30 days following the date of receipt to submit observations. Failing that, the decision becomes enforceable the day after the time limit for submitting observations has elapsed.

If the Contractor submits observations, the Contracting Authority, taking into account the relevant observations, must Notify the Contractor:

(a) of the withdrawal of its intention to reduce payment; or

(b) of its final decision to reduce payment and the corresponding amount.

### Claims and liability

Any reduction in price does not affect the Contractor’s actual or potential liability or the Contracting Authority’s rights under Article II.18.

## Suspension of the implementation of the FWC

### Suspension by the Contractor

If the Contractor is affected by Force Majeure, it may suspend the provision of the Services under a Specific Contract.

The Contractor must immediately Notify the Contracting Authority of the suspension. The Notification must include a description of the Force Majeure and state when the Contractor expects to resume the provision of Services.

The Contractor must Notify the Contracting Authority as soon as it is able to resume Performance of the Specific Contract, unless the Contracting Authority has already terminated the FWC or the Specific Contract.

### Suspension by the Contracting Authority

The Contracting Authority may suspend the Implementation of the FWC or Performance of a Specific Contract or any part of it:

(a) if the procedure for awarding the FWC or a Specific Contract or the Implementation of the FWC proves to have been subject to Irregularities, Fraud or Breach of Obligations;

(b) in order to verify whether the presumed Irregularities, Fraud or Breach of Obligations have actually occurred.

The Contracting Authority must Formally Notify the Contractor of the suspension and the reason for it. Suspension takes effect on the date of Formal Notification, or at a later date if the Formal Notification so provides.

The Contracting Authority must Notify the Contractor as soon as the verification is completed whether:

1. it is lifting the suspension; or
2. it intends to terminate the FWC or a Specific Contractunder Article II.18.1(f) or (j).

The Contractor is not entitled to any compensation for suspension of any part of the FWC or a Specific Contract.

In addition the Contracting Authority may suspend the time allowed for payments in accordance with Article II.21.7.

## Termination of the FWC

### Grounds for termination by the Contracting Authority

The Contracting Authority may terminate the FWC and/or any ongoing Specific Contractin one or more of the following circumstances:

1. if provision of the Services under an ongoing Specific Contract has not actually started within 15 days from the scheduled date and the Contracting Authority considers that the new date proposed, if any, is unacceptable, taking into account Article II.11.2;
2. if the Contractor is unable to obtain any permit or licence required for Implementation of the FWC;
3. if the Contractor does not implement the FWC or perform the Specific Contract in accordance with the Technical Specifications or Request for Service or is in breach of another substantial contractual obligation or repeatedly refuses to sign Specific Contracts. Termination of three or more Specific Contracts in these circumstances also constitutes grounds for termination of the FWC;
4. if the Contractor or any person that assumes unlimited liability for the debts of the Contractor is in one of the situations provided for in points (a) and (b) of Article 136(1) of the Financial Regulation[[52]](#footnote-52);
5. if the Contractor or any Related Person is in one of the situations provided for in points (c) to (h) of Article 136(1) or to Article 136(2) of the Financial Regulation.
6. if the procedure for awarding the FWC or the Implementation of the FWC prove to have been subject to Irregularities, Fraud or Breach of Obligations;
7. if the Contractor does not comply with applicable obligations under environmental, social and labour laws established, as the case may be, by Union Law, national law, collective agreements or by the international environmental, social and labour law provisions listed in Annex X to Directive 2014/24/EU;
8. if the Contractor is in a situation that could constitute a Conflict of Interest or a Professional Conflicting Interest as referred to in Article II.7;
9. if a change to the Contractor’s legal, financial, technical, organisational or ownership situation is likely to substantially affect the Implementation of the FWC or substantially modify the conditions under which the FWC was initially awarded or a change regarding the exclusion situations listed in Article 136 of Regulation (EU) 2018/1046 that calls into question the decision to award the contract;
10. in the event of Force Majeure, where either resuming implementation is impossible or the necessary ensuing amendments to the FWC or a Specific Contract would mean that the Technical Specifications are no longer fulfilled or result in unequal treatment of tenderers or contractors;
11. if the needs of the Contracting Authority change and it no longer requires new Services under the FWC; in such cases ongoing Specific Contracts remain unaffected;
12. if the termination of the FWC with one or more of the Contractors means that the multiple FWC with reopening of competition no longer has the minimum required level of competition;
13. if the Contractor is in breach of the data protection obligations resulting from Article II.9.2;
14. if the Contractor does not comply with the applicable data protection obligations resulting from Regulation (EU) 2016/679.

### Grounds for termination by the Contractor

The Contractor may terminate the FWC and/or any ongoing Specific Contract if the Contracting Authority fails to comply with its material obligations provided in the FWC or Specific Contract and, notwithstanding Formal Notification in this respect by the Contractor, the Contracting Authority is unable to remedy the breach within 30 (thirty) Working Days as from the receipt of such Notification.

### Procedure for termination

A Party must Formally Notify the other Party of its intention to terminate the FWC or a Specific Contract and the grounds for termination. Without prejudice to the right of the Contracting Authority to remedy its breach in accordance with Article II.18.2, the following procedure shall apply in case of termination pursuant to Articles II.18.1 and II.18.2.

The other Party has 30 days following the date of receipt of the Formal Notification to submit observations, including the measures it has taken or will take to continue fulfilling its contractual obligations. Failing that, the decision to terminate becomes enforceable the day after the time limit for submitting observations has elapsed.

If the other Party submits observations, the Party intending to terminate must Formally Notify it either of the withdrawal of its intention to terminate or of its final decision to terminate.

In the cases referred to in points (a) to (d), (g) to (i), (k) to (n) of Article II.18.1 and in Article II.18.2, the date on which the termination takes effect must be specified in the Formal Notification.

In the cases referred to in points (e), (f) and (j) of Article II.18.1, the termination takes effect on the day following the date on which the Contractor receives Notification of termination.

In addition, at the request of the Contracting Authority and regardless of the grounds for termination, the Contractor must provide all necessary assistance, including information, documents and files, to allow the Contracting Authority to complete, continue or transfer the Services to a new Contractor or internally, without interruption or adverse effect on the quality or continuity of the Services. The Parties may agree to draw up a transition plan detailing the Contractor’s assistance unless such plan is already detailed in other contractual documents or in the Technical Specifications. The Contractor must provide such assistance at no additional cost, except if it can demonstrate that it requires substantial additional resources or means, in which case it must provide an estimate of the costs involved and the Parties will negotiate an arrangement in good faith.

### Effects of termination

The Contractor is liable for damage incurred by the Contracting Authority as a result of the termination of the FWC or a Specific Contract*,* including the additional cost of appointing and contracting another Contractor to provide or complete the Services, unless the damage was caused by the situation specified in Article II.18.1(j), (k) or (l), or in Article II.18.2; in addition, the Contractor shall not be liable if the damage was caused by the situation specified in Article II.18.1(b), provided that lack of permit or license is not attributable to negligence of the Contractor.

The Contracting Authority is entitled to claim compensation for such damage.

The Contractor is not entitled to compensation for any loss resulting from the termination of the FWC or a Specific Contract, unless the loss was caused by the situation specified in Article II.18.2. In any case, in no event the Contracting Authority will be liable for any indirect or consequential damages incurred by the Contractor, including, without limitation, loss of anticipated profits.

The Contractor must take all appropriate measures to minimise costs, prevent damage and cancel or reduce its commitments.

Within 60 days of the date of termination, the Contractor must submit any report, deliverable or Result and any invoice required for Services that were provided before the date of termination.

In the case of joint tenders, the Contracting Authority may terminate the FWC or a Specific Contractwith each member of the group separately on the basis of points (d), (e), (g), (m) and (n) of Article II.18.1, under the conditions set out in Article II.11.2.

## Invoices, value added tax and e-invoicing

### Invoices and value added tax

Invoices must contain the Contractor’s (or leader’s in the case of a joint tender) identification data, the amount, the currency and the date, as well as the FWC reference and reference to the Specific Contract.

Invoices must indicate the place of taxation of the Contractor (or leader in the case of a joint tender) for value added tax (VAT) purposes and must specify separately amounts not including VAT and amounts including VAT.

The Contracting Authority is exempt from all taxes and duties, including VAT, in accordance with Articles 3 and 4 of the Protocol 7 of the Treaty on the Functioning of the European Union on the privileges and immunities of the European Union.

The Contractor (or leader in the case of a joint tender) must complete the necessary formalities with the relevant authorities to ensure that the supplies and services required for Implementation of the FWC are exempt from taxes and duties, including VAT.

### E-invoicing

If provided for in the special conditions, the Contractor (or leader in the case of a joint tender) submits invoices in electronic format if the conditions regarding electronic signature specified by Directive 2006/112/EC on VAT are fulfilled, i.e. using a qualified electronic signature or through electronic data interchange.

Reception of invoices by standard format (pdf) or email is not accepted.

## Price revision

If a price revision index is provided in Article I.5.2, this Article applies to it.

Prices are fixed and not subject to revision during the first year of the FWC.

At the beginning of the second and every following year of the FWC, each price may be revised upwards or downwards at the request of one of the Parties.

A Party may request a price revision in writing no later than three months before the anniversary date of entry into force of the FWC. The other Party must acknowledge the request within 14 days of receipt.

At the anniversary date, the Contracting Authority must communicate the final index for the month in which the request was received, or failing that, the last provisional index available for that month. The Contractor establishes the new price on this basis and communicates it as soon as possible to the Contracting Authority for verification.

The Contracting Authority purchases on the basis of the prices in force at the date on which the Specific Contractenters into force.

The price revision is calculated using the following formula:

Ir

Pr = Po x ( — )

Io

where: Pr = revised price;

Po = price in the tender;

Io = index for the month in which the FWC enters into force;

Ir = index for the month in which the request to revise prices is received.

## Payments and guarantees

### Date of payment

The date of payment is deemed to be the date on which the Contracting Authority’s account is debited.

### Currency

Payments are made in euros, unless another currency is provided for in Article I.7.

### Conversion

The Contracting Authority makes any conversion between the euro and another currency at the daily euro exchange rate published in the Official Journal of the European Union, or failing that, at the monthly accounting exchange rate, as established by the European Commission and published on the website indicated below, applicable on the day when it issues the payment order or, for reimbursable expenses, applicable on the date on which the expenditure takes place.

The Contractor makes any conversion between the euro and another currency at the monthly accounting exchange rate, established by the Commission and published on the website indicated below, applicable on the date of the invoice or, for reimbursable expenses, applicable on the date on which the expenditure takes place.

<http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm>

### Costs of transfer

The costs of the transfer are borne as follows:

1. the Contracting Authority bears the costs of dispatch charged by its bank;
2. the Contractor bears the costs of receipt charged by its bank;
3. the Party causing repetition of the transfer bears the costs for repeated transfer.

### Pre-financing, performance and money retention guarantees

If, as provided for in Article I.6*,* a financial guarantee is required for the payment of pre-financing, as performance guarantee or as retention money guarantee, it must fulfil the following conditions:

1. the financial guarantee is provided by a bank or a financial institution approved in advance by the Contracting Authority or, at the request of the Contractor and with the agreement of the Contracting Authority, by a third party; and
2. the guarantee shall have the effect of making the bank or financial institution or the third party provide irrevocable collateral security, or stand as first-call guarantor of the Contractor’s obligations without requiring that the Contracting Authority has recourse against the principal debtor (the Contractor).

The Contractor bears the cost of providing such guarantee.

Pre-financing guarantees must remain in force until the pre-financing is cleared against interim payments or payment of the balance. Where the payment of the balance takes the form of a debit note, the pre-financing guarantee must remain in force for three months after the debit note is sent to the Contractor. The Contracting Authority must release the guarantee within the following month.

Performance guarantees cover compliance with substantial contractual obligations until the Contracting Authority has given its final approval for the service. The performance guarantee must not exceed 10 % of the total price of the Specific Contract. The Contracting Authority must release the guarantee fully after final approval of the service, as provided for in the Specific Contract.

Retention money guarantees cover full delivery of the service in accordance with the Specific Contract including during the contract liability period and until its final approval by the Contracting Authority. The retention money guarantee must not exceed 10 % of the total price of the Specific Contract. The Contracting Authority must release the guarantee after the expiry of the contract liability period as provided for in the Specific Contract.

The Contracting Authority must not request a retention money guarantee for a Specific Contract where it has requested a performance guarantee.

### Interim payments and payment of the balance

The Contractor (or leader in the case of a joint tender) must send an invoice for interim payment, as provided for in this FWC (including its Annexes) and in the Specific Contract.

The Contractor (or leader in the case of a joint tender) must send an invoice for payment of the balance within 60 days of the end of the period of provision of the Services, as provided for in this FWC or in the Specific Contract.

Payment of the invoice and approval of documents does not imply recognition of the regularity, authenticity, completeness and correctness of the declarations and information they contain.

Payment of the balance may take the form of recovery.

### Suspension of the time allowed for payment

The Contracting Authority may suspend the payment periods specified in Article I.6 at any time by Notifying the Contractor (or leader in the case of a joint tender) that its invoice cannot be processed. The reasons the Contracting Authority may cite for not being able to process an invoice are:

1. because it does not comply with the FWC;
2. because the Contractor has not produced the appropriate documents or deliverables; or
3. because the Contracting Authority has observations on the documents or deliverables submitted with the invoice.

The Contracting Authority must Notify the Contractor (or leader in the case of joint tender) as soon as possible of any such suspension, giving the reasons for it. In cases b) and c) referred above, the contracting authority shall Notify the Contractor (or leader in case of a joint tender) the time limits to submit additional information or corrections or a new version of the documents or deliverables if the Contracting Authority requires it.

Suspension takes effect on the date the Contracting Authority sends the Notification. The remaining payment period resumes from the date on which the requested information or revised documents are received or the necessary further verification, including on-the-spot checks, is carried out. Where the suspension period exceeds two months, the Contractor (or leader in the case of a joint tender) may request the Contracting Authority to justify the continued suspension.

Where the payment periods have been suspended following rejection of a document referred to in the first paragraph of this Article and the new document produced is also rejected, the Contracting Authority reserves the right to terminate the Specific Contractin accordance with Article II.18.1(c)*.*

### Interest on late payment

On expiry of the payment periods specified in Article I.6, the Contractor (or leader in the case of a joint tender) is entitled to interest on late payment at the rate applied by the European Central Bank for its main refinancing operations in euros (the reference rate) plus eight points. The reference rate is the rate in force, as published in the C series of the *Official Journal of the European Union,* on the first day of the month in which the payment period ends.

Suspension of the payment period as provided for in Article II.21.7 is not considered as giving rise to late payment.

Interest on late payment covers the period running from the day following the due date for payment up to and including the date of payment as defined in Article II.21.1.

However, when the calculated interest is EUR 200 or less, it must be paid to the Contractor (or leader in the case of a joint tender) only if it requests it within two months of receiving late payment.

## Reimbursements

**II.22.1** If provided for in the special conditions or in the Technical Specifications, the Contracting Authority must reimburse expenses directly connected with the provision of the Services either when the Contractor provides it with supporting documents or on the basis of flat rates.

**II.22.2** The Contracting Authority reimburses travel and subsistence expenses on the basis of the shortest itinerary and the minimum number of nights necessary for overnight stay at the destination.

**II.22.3** The Contracting Authority reimburses travel expenses as follows:

(a) travel by air: up to the maximum cost of an economy class ticket at the time of the reservation;

(b) travel by boat or rail: up to the maximum cost of a first class ticket;

(c) travel by car: at the rate of one first class rail ticket for the same journey and on the same day;

In addition, the Contracting Authority reimburses travel outside European Union territory if it has given its prior written approval for the expenses.

**II.22.4** The Contracting Authority reimburses subsistence expenses on the basis of a daily subsistence allowance as follows:

(a) for journeys of less than 200 km for a return trip, no subsistence allowance is payable;

(b) the daily subsistence allowance is payable only on receipt of supporting documents proving that the person concerned was present at the destination;

(c) the daily subsistence allowance takes the form of a flat‑rate payment to cover all subsistence expenses, including meals, local transport including transport to and from the airport or station, insurance and sundries;

(d) the daily subsistence allowance is reimbursed at the flat rates specified in Article I.5.3;

(e) accommodation is reimbursed on receipt of supporting documents proving the necessary overnight stay at the destination, up to the ceilings specified in Article I.5.3.

**II.22.5** The Contracting Authority reimburses the cost of shipment of equipment or unaccompanied luggage if it has given its prior written approval for the expense.

## Recovery

**II.23.1.** **Recovery**

If an amount is to be recovered under the terms of the FWC, the Contractor must repay the Contracting Authority the amount in question.

### Recovery procedure

Beforerecovery, the Contracting Authority must Formally Notify the Contractor of its intention to recover the amount it claims, specifying the amount due and the reasons for recovery and inviting the Contractor to make any observations within 30 days of receipt.

If no observations have been submitted or if, despite the observations submitted, the Contracting Authority decides to pursue the recovery procedure, it must confirm recovery by Formally Notifying a debit note to the Contractor, specifying the date of payment. The Contractor must pay in accordance with the provisions specified in the debit note.

If the Contractor does not pay by the due date, the Contracting Authority may, after informing the Contractor in writing, recover the amounts due:

1. by offsetting them against any amounts owed to the Contractor by F4E, the European Union or the European Atomic Energy Community;
2. by calling in a financial guarantee if the Contractor has submitted one to the Contracting Authority; and/or
3. by taking legal action.

### Interest on late payment

If the Contractor does not honour the obligation to pay the amount due by the date set by the Contracting Authority in the debit note, the amount due bears interest at the rate indicated in Article II.21.8. Interest on late payments will cover the period starting on the day after the due date for payment and ending on the date when the Contracting Authority receives the full amount owed.

Any partial payment is first entered against charges and interest on late payment and then against the principal amount.

### Recovery rules in the case of joint tender

If the contract is signed by a group (joint tender), the group is jointly and severally liable under the conditions set out in Article II.6 (liability). The Contracting Authority shall send the debit note first to the leader of the group.

If the leader does not pay by the due date the whole amount, and if the amount due cannot be offset or can only be offset partially in accordance with Article II.23.2 (a), then the Contracting Authority may claim the amount still due to any other member or members of the group by respectively Notifying them with a the debit note in conformity with the provisions laid down in Article II.23.2.

## Checks and audits

**II.24.1** The Contracting Authority and the European Anti-Fraud Office may check or require an audit on the Implementation of the FWC. This may be carried out either by OLAF’s own staff or by any outside body authorised to do so on its behalf.

Such checks and audits may be initiated at any moment during the provision of the Services and up to five years starting from the payment of the balance of the last Specific Contractissued under this FWC

The audit procedure is initiated on the date of receipt of the relevant letter sent by the Contracting Authority. Audits are carried out on a confidential basis.

**II.24.2** The Contractor must keep all original documents stored on any appropriate medium, including digitised originals if authorised under national law, for a period of five years starting from the payment of the balance of the last Specific Contractissued under this FWC.

**II.24.3** The Contractor must grant the Contracting Authority’s staff and outside personnel authorised by the Contracting Authority the appropriate right of access to sites and premises where the FWC is implemented and to all the information, including information in electronic format, needed to conduct such checks and audits. The Contractor must ensure that the information is readily available at the moment of the check or audit and, if so requested, that information is handed over in an appropriate format.

**II.24.4** On the basis of the findings made during the audit, a provisional report is drawn up. The Contracting Authority or its authorised representative must send it to the Contractor, who has 30 days following the date of receipt to submit observations. The Contractor must receive the final report within 60 days following the expiry of the deadline to submit observations.

On the basis of the final audit findings, the Contracting Authority may recover all or part of the payments made in accordance with Article II.23 and may take any other measures which it considers necessary.

**II.24.5** In accordance with Council Regulation (Euratom, EC) No 2185/96 of 11 November 1996 concerning on-the-spot checks and inspection carried out by the Commission in order to protect the European Communities’ financial interests against Fraud and other Irregularities and Regulation (EU, Euratom) No 883/2013 of the European Parliament and of the Council of 11 September 2013 concerning investigations conducted by the European Anti-Fraud Office, the European Anti-Fraud Office may carry out investigations, including on the spot checks and inspections, to establish whether there has been Fraud, corruption or any other illegal activity under the contract affecting the financial interests of the Contracting Authority or European Union. Findings arising from an investigation may lead to criminal prosecution under national law.

The investigations may be carried out at any moment during the provision of the Services and up to five years starting from the payment of the balance of the last Specific Contractissued under this FWC.

**II.24.6** The Court of Auditors, the European Public Prosecutor’s Office established by Council Regulation (EU) 2017/1939[[53]](#footnote-53) (‘the EPPO’) and, in connection with processing of personal data, the European Data Protection Supervisor, have the same rights as the Contracting Authority, particularly right of access, for the purpose of checks, audits and investigations.

**SIGNATURES**

|  |  |
| --- | --- |
| For the Contractor,  [***Company name***]  *[forename/surname/position]*  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Done at [*place*], [*date*] | For the Contracting Authority,  **The European Joint Undertaking for ITER and the Development of Fusion Energy**  [*forename/surname/position*]  Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Done [Barcelona], [*date*] |

In duplicate in English.

**ANNEX A**

* Model for Specific Contracts
* Model for Order Forms

**SPECIFIC CONTRACT**

**No F4E-[AMF]/[AFC]-[*complete*]**

**implementing framework contract No F4E-[AMF]/[AFC] - [*complete*]**

1. The European Joint Undertaking for ITER and the Development of Fusion Energy (hereinafter referred to as “**F4E**” or the “**Contracting Authority**”), established by Council Decision (Euratom) N° 2007/198 of 27 March 2007, represented for the purposes of signing this Specific Contractby [*forename, surname, function, department of authorising officer*],

and

2. [*Full Contractor’s official name*]

[*Official legal form*]

**[***Statutory registration number or ID or passport number***]**

[*Full official address*]

[*VAT registration number*]

[appointed as leader of the group by the members of the group that submitted the joint tender]

[*repeat these data as many times as there are contractors in case of joint tender and continue numbering*]

([collectively] the “**Contractor**"), represented for the purposes of signing this Specific Contractby[*forename, surname and function of legal representative*,]

HAVE AGREED

##### Article 1 Subject matter

**1.1** This Specific Contractimplements framework contract (FWC) No F4E-[AMF]/[AFC] -[*complete*], [lot [*complete*]] signed by the Parties on [*complete date*]*.*

**1.2** In accordance with the provisions set out in the FWC and in this Specific Contractand [its][their] annex[es], which form an integral part of it, the Contractor must provide the [following Services:] [Services specified in Annex [*complete*]*.*]

**1.3** Unless otherwise specified in this Specific Contract, terms used with initial capital letter shall have the same meaning attributable to them in the FWC.

##### Article 2 Entry into force and duration

**2.1** This Specific Contractenters into force [on the date on which the last Party signs it] [on[*insert date*] if both Parties have already signed it].

**2.2** The provision of the Services starts from [the date of entry into force of this Specific Contract] [*insert date*].

**2.3** The provision of the Services must not exceed [*complete*] **[**days] [months**]**. The Parties may extend the duration by written agreement before it elapses and before expiry of the FWC.

##### Article 3 Price

* 1. The price payable under this Specific Contractexcluding reimbursement of expenses is EUR [*amount in figures and in words*].

[The maximum amount covering all Services to be provided under this Specific Contractincluding reimbursement of expenses and excluding price revision is EUR [*amount in figures and in words*].

**3.2** [Reimbursement of expenses is not applicable to this Specific Contract.] [Within the maximum amount, up to EUR [*amount in figures and in words*] is earmarked for expenses, which must be reimbursed in accordance with the FWC] [Pursuant to Article I.5.3 of the FWC, the [maximum] amount of the lump-sum for [ [travel] [subsistence] [accommodation] ] expenses shall be EUR [*amount in figures and in words*] .

**3.3** As a general rule, pursuant to the provisions of Article 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, the Contracting Authority is exempt from all taxes and dues, including value added tax, on payments due in respect of this contract. Based on EC Directive 2006/112/EC and on Decision 2513 of Spanish Foreign Affairs Ministry published in BOE n.33 of 7 February 1997, the Contracting Authority, as an European Union body, is exempted from value added tax (VAT), for the delivery of goods and services for official use, if the amounts of each transaction is equal or higher than 300.05 €, VAT excluded (751.27 € if related to constructions). Further reference on the value added tax application can be found in Article I.6.6 of the FWC. [[54]](#footnote-54)

##### Article 4 communication details

For the purpose of this Specific Contract, communications must be sent to the following addresses:

Contracting authority:

The European Joint Undertaking for the Development of ITER and Fusion Energy

c/Josep Pla 2

Torres Diagonal Litoral

Building B3

08019 Barcelona

Spain

To the attention of: *[name of Responsible Officer]*

E-mail: [*insert functional mailbox*]

Contractor (or leader in the case of a joint tender):

[*Full name*]

[*Function*]

[*Company name*]

[*Full official address*]

To the attention of: *[complete]*

E-mail: [*complete*]

##### Article 5 Performance guarantee

[Performance guarantee is not applicable to this Specific Contract.]

[This contract is subject to a performance guarantee of [*complete*] % of the price of the Specific Contract[excluding reimbursable expenses]]. The Contractor (or leader in the case of a joint tender) must provide a performance guarantee in the form of a financial guarantee for EUR[*amount in figures and in words]* in accordance with the conditions laid down in Article II.21.5 of the FWC. The guarantee must be released [30] [60] [90] days after the final approval of the services.]

##### Article 6 Retention money guarantee

[Retention money guarantee is not applicable to this Specific Contract.]

[This contract is subject to a retention money guarantee of [*complete*]  % of the price of the Specific Contract[excluding reimbursable expenses]].

*[Option 1: Retention money guarantee by deduction]*

[The guarantee is constituted by deduction of this amount on payments. It will be withheld for up to [30] [60] [90] days after the final approval of the services.]

*[Option 2: Retention money guarantee by financial guarantee]*

[The Contractor (or leader in the case of a joint tender) must provide a retention money guarantee in the form of a financial guarantee for EUR[*amount in figures and in words]* in accordance with the conditions laid down in Article II.21.5. The guarantee must be released [30] [60] [90] days after the final approval of the services.]

*[****Article 7*** *– [possible additional provisions] [[55]](#footnote-55)]*

**Annexes**

[Request for Service]

[Specification of the Task]

[Contractor’s specific tender of [*insert date*]

**Signatures**

|  |  |
| --- | --- |
| For the Contractor,  [*Company name*/*forename/surname/function*]  signature: | For the Contracting Authority,  [*forename/surname/function*]  signature: |
| Done at [*place*], [*date*] | Done at [*place*], [*date*] |

In duplicate in English.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Description: brand_lateral_RGB |  | |  |  | | --- | --- | | Ref. | F4E\_D\_[*insert ref.*] | | Page | [ ] / [ ] |   **FRAMEWORK CONTRACT**  **ORDER FORM** | | | | | |
|  |  |  | | | | | |
|  | |  | | | | | |
| Josep Pla nr 2, TDL, Building B3, 08019 Barcelona, Spain |  |  | Order number: *[F4E-[AMF]/[AFC] XXX.XX.XX][[56]](#endnote-1)* |  | | | |
| Tel.: +34 93 320 1800 |  |  | Currency of payment: EUR | *[Insert Company name]*  *[Contact person’s name]*  *[Company’s official address in full]* | | | |
| E-mail: info@f4e.europa.eu |  |  | *[Offer (date and reference):* |  | | | |
|  |  |  | *[dd/mm/yyyy] [include reference number if there is one]][[57]](#endnote-2)* |  | | | |
| This order is governed by the provisions of Framework Contract No. *[F4E-[AMF]/[AFC] XXX.XX]*  in force from *[dd/mm/yyyy]* to *[dd/mm/yyyy]* | | | | | | | |
|
| LISTING OF THE [[SUPPLIES] / [SERVICES]][[58]](#endnote-3) | | | | UNIT[[59]](#endnote-4) | QUANTITY | PRICE in € | |
| and code | | | |  |  | UNIT PRICE[[60]](#endnote-5) | TOTAL |
|  | | | |  |  |  |  |
|  | | | |  |  |  |  |
|  | | | |  |  |  |  |
|  | | | |  |  |  |  |
|  | | | |  |  |  |  |
|  | | | |  |  |  |  |
| As a general rule, pursuant to the provisions of Article 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, the Contracting Authority is exempt from all taxes and duties, including value added tax, on payments due in respect of this contract. Based on EC Directive 2006/112/EC and on Decision 2513 of Spanish Foreign Affairs Ministry published in BOE n.33 of 7 February 1997, the Contracting Authority, as an European Union body, is exempted from value added tax (VAT), for the delivery of goods and services for official use, if the amounts of each transaction is equal or higher than 300.05 €, VAT excluded (751.27 € if related to constructions). | | | |  |  |  |  |
| Packaging[[61]](#endnote-6) |  |  |  |
| Insurance |  |  |  |
| Transport |  |  |  |
| Assembly |  |  |  |
| VAT[[62]](#endnote-7) |  |  |  |
| **TOTAL :** |  |  |  |
| Place of delivery or performance [and/or Incoterm[[63]](#endnote-8)]: *[insert place]* | | | | **Contractor's signature[[64]](#endnote-9)** | | | |
| Final date of delivery or performance: *[dd/mm/yyyy]* | | | |  |  | | |
| Terms of payment: *[insert terms]* | |  |  | Name: |  | | |
|  |  |  |  | Position: |  | | |
| [Guarantee[[65]](#endnote-10):] |  |  |  | Date: |  |  |  |
| Date of issue: *[dd/mm/yyyy]* | |  |  |  |  |  |  |
| Signature*[[66]](#endnote-11)* *[include name and position of F4E Authorising officer][[67]](#endnote-12)*: | | | | |  |  |  |
| The invoice shall be payable only if the Contractor has returned the signed Order Form. | | | | | | | |

1. ADVICE: Include this option if it is an inter-institutional procurement. See point 2.4 of the Vademecum for more information on inter-institutional procurements. Note also that in case of an inter-institutional procurement, an Article on this issue needs to be included (see Article I.13 of this template). Please note that any reference to ‘Vademecum’ in this contract is to be considered as reference to the Vademecum version of February 2016, updated as of September 2018. [↑](#footnote-ref-1)
2. ADVICE: According to the Director’s Communication to the Staff of 28/05/2013, budgetary and legal commitments for contracts with a value equal or superior to 10 million euros shall be authorised by the Director. [↑](#footnote-ref-2)
3. Delete if Contractor is a natural person or a body governed by public law. [↑](#footnote-ref-3)
4. Delete if Contractor is a body governed by public law. For natural persons, indicate the number of their identity card or, failing that, of their passport or equivalent.In some countries, companies may not have a registration number other than their VAT registration number. In Spain, the NIF (Número de Identificación Fiscal, formerly called CIF – Código de Identificación Fiscal – when referring to companies) is the fiscal identification number and is used in practice for identification purposes in all official documents, including the Commercial Register. [↑](#footnote-ref-4)
5. In Spain, this is the NIF (*Número de Identificación Fiscal*), which has 9 characters. Other EU countries may have other formats. [↑](#footnote-ref-5)
6. ADVICE: Insert any or both of these options (“Model Order Form”, “Model Specific Contract”) as Annex A if such documents are included in the contract. If only one of these options is used, references to the other should be deleted from the Annex. Specific Contracts are mostly used when implementing services, whereas Order Forms are preferred in the field of supplies, indicating the quantities, unit price and delivery date. [↑](#footnote-ref-6)
7. ADVICE: Mention of this Annex has to be deleted if no reimbursable expenses are foreseen. If applicable, Annex V shall be duly completed, depending on the scope of the contract, in accordance with Annex I of the Mission Guide. [↑](#footnote-ref-7)
8. ADVICE: Please list other annexes, if applicable. In case of use of optional Art. I.15[ ] (NDA template), the applicable NDA template should be attached as annex to the FWC. Please liaise with your LO in case of doubt. [↑](#footnote-ref-8)
9. WARNING: To be taken into account that for contracts/services to be managed/carried out in other F4E offices (e.g., Cadarache, France), it might be opportune to add reference to such other office/country (in addition to, or in lieu of, referring to Barcelona, both in points (i) and (ii)). [↑](#footnote-ref-9)
10. VADEMECUM (section 2.2.3): *The duration of framework contracts shall be stipulated and may not exceed four years, save in exceptional cases justified, in particular, by the subject of the contract.* [↑](#footnote-ref-10)
11. As a rule the Contracting Authority signs last. In this case, the Contractor should be duly informed of the date on which the FWC enters into force (date of signature by the Contracting Authority). [↑](#footnote-ref-11)
12. VADEMECUM (section 4.3.2.6): *It is recommended to use automatic contract renewal, i.e. … the contract is renewed with no action by the parties, and if the contract is not renewed, the party refusing renewal should notify the other party at least three months before**the anniversary date of the contract.* In order to ensure continuity of services in favour of F4E, it is strongly recommended to provide that the contractor must provide for six months prior notice. [↑](#footnote-ref-12)
13. WARNING: e-Prior system is not fully implemented by F4E. Before full implementation takes place, any reference to [e-Prior] in the special conditions has to be deleted while tailoring the draft model contract for a specific procurement procedure. Nevertheless, [e-Prior] system may be used for receiving invoices (*E-invoicing*) from the contractor (provided that the contractor is willing to use it): as a consequence, reference to [e-Prior] should be kept under Article I.6 (payments) with reference to receipt of invoice. [↑](#footnote-ref-13)
14. WARNING: Exception made for specific and well-justified cases, it is strongly recommended to avoid triggering termination in the event that the contractor (i) refuses to sign or (ii) fails to send back on time *1 (one)* Specific Contract *only*. The clause can be either left generic (with no reference to what “repeatedly” means), or to be complemented by completing the following paragraph (in grey, within bracket), on a case-by-case basis. In any case, if the Contractor refuses to sign and/or fails to send back on time a number of Specific Contracts equal to, or higher than, the number stipulated therein, it will remain at F4E’s discretion the exercise of its right to terminate the contract, invoking Art. II.18.1(c). [↑](#footnote-ref-14)
15. WARNING: please see footnote No 14 above. [↑](#footnote-ref-15)
16. ADVICE: Reference to “maximum” prices to be used in particular for FWC with reopening of competition, in order to limit the risk that contractors, on one hand offer unrealistically low prices for the award of the FWC while, on the other hand, their subsequent offers for the Specific Contracts are much higher. [↑](#footnote-ref-16)
17. Specify the consumer price index or any other index adapted to the purchase, e.g.:

    * ‘Euro area (19 countries)’: for contracts expressed in euro (as a general rule);
    * ‘European Union (current composition)’: for contracts performed in the European Union outside the euro area;
    * consumer price index of the state in whose currency the FWC price is expressed:

    a) index of the state where the contractor is mainly based; or

    b) index of the state where the service will be mainly carried out.

    * Any other index corresponding to the main cost of the contract (e.g. index linked to salaries for interim services, oil prices for transport-related contracts, etc.).

    [↑](#footnote-ref-17)
18. In most cases, this option is not applicable as it is recommended to use a global price covering all parts of the services. If reimbursable expenses have to be used, they must be defined in the framework contract, not in the Specific Contract. [↑](#footnote-ref-18)
19. This option provides for reimbursing the expenses through a fixed amountpreviously calculated based on an estimation of costs, to simplify the refunding process. It should be used, in particular, in cases where expenses are not too high. Should this option (pre-agreed lump sum) be chosen for all type of expenses, the remaining paragraphs of Art. I.5.3 should be deleted. [↑](#footnote-ref-19)
20. Please note that shipment expenses should be reimbursed in exceptional cases only. Delete as appropriate. In any case, please note that, pursuant to Article II.22.5 shipment expenses are refunded only in case of prior written approval of the same by F4E. [↑](#footnote-ref-20)
21. The daily subsistence allowance and accommodation ceilings must be copied directly into the text of the article or in a specific annex (Annex F). They may be taken from F4E/DG HR’s missions guide   
    (<https://myintracomm.ec.europa.eu/hr_admin/en/missions/Pages/index.aspx> — internal link, not on the internet). [↑](#footnote-ref-21)
22. The insertion of pre-financing and interim payment articles is optional but the contract must always include provision for payment of the balance. [↑](#footnote-ref-22)
23. In procurement contracts, pre-financing should be proposed in exceptional circumstances only. If applicable, it should not exceed 30 % of the total amount of the Specific Contract. VADEMECUM *(section 4.3.2.2): Pre-financing is meant to provide a float to the contractor, and normally it is used in grants, not so much in procurement because it is considered as a risk for the Union's budget (payment with nothing in return). It should be exceptional in procurement and be used in justified cases (procurement requiring high start-up costs e.g. for works contracts, or purchase of patents or practice of the sector such as booking of conference room).* [↑](#footnote-ref-23)
24. To be checked on a case-by-case basis opportunity to manage receipt of invoice through [e-Prior]*.* [↑](#footnote-ref-24)
25. Requesting a pre-financing guarantee is not allowed for contracts of less than EUR 60 000. In cases where pre-financing is envisaged, use of a guarantee should be duly justified through a documented risk assessment. [↑](#footnote-ref-25)
26. To be added only in the case of Specific Contracts of more than EUR 5 000 000 for which pre-financing is paid and for which the reporting periods for interim payments or payments of the balance exceed 18 months. [↑](#footnote-ref-26)
27. VADEMECUM (section 4.3.2.2): *Interim payments are made in exchange of receiving something of equivalent value (e.g. raw data from a survey, the first draft of a report, the per country situation of 5 out of 28 countries). In order to facilitate access to SMEs to EU contracts, it is recommended to pay an interim payment fairly early in the payment schedule, but it should still be in exchange of a deliverable of equivalent value. Apart from reducing the risk to the budget, it is also useful in case of termination of the contract, as it ensures that the contracting authority does not pay more than what the deliverable is worth.* [↑](#footnote-ref-27)
28. Should the contract provide for pre financing, the relevant amount has to be cleared against either the interim payment (if any) or the payment of the balance. [↑](#footnote-ref-28)
29. Maximum 90 days for complex contracts (in exceptional cases, to be properly justified and documented), 60 days for other contracts for which payment depends on the approval of a report or a certificate and 30 days for all other contracts. [↑](#footnote-ref-29)
30. Should the contract provide for pre financing, the relevant amount has to be cleared against either the interim payment (if any) or the payment of the balance. [↑](#footnote-ref-30)
31. Maximum 90 days for complex contracts (in exceptional cases, to be properly justified and documented), 60 days for other contracts for which payment depends on the approval of a report or a certificate and 30 days for all other contracts. [↑](#footnote-ref-31)
32. Please consult LO in case of use of either performance or retention money guarantee. [↑](#footnote-ref-32)
33. OJ C 321 E of 29.12.2006 p. 0318-0324. [↑](#footnote-ref-33)
34. Example 1: for a contractor rendering services taxable in Spain, delivered to F4E in Spain, direct exemption will apply: the Contractor shall issue the invoice applying a 0% VAT rate. Example 2: for a contractor rendering services taxable in France, indirect exemption will apply if the services are ordered and delivered to F4E in France: the Contractor shall issue the invoice applying VAT. [↑](#footnote-ref-34)
35. The VAT exemption certificates are available in all official EU languages on <https://myintracomm.ec.europa.eu/budgweb/EN/imp/vat/Pages/imp-140-020_vatmanual.aspx>. For more information on direct or indirect exemptions and the criteria to be applied, please refer to F4E VAT manual available on

    <http://f4emanual.f4eda.local/Administrative%20Manual%20Of%20Procedures/VAT.aspx> [↑](#footnote-ref-35)
36. BIC or SWIFT code for countries with no IBAN code [↑](#footnote-ref-36)
37. Clause I.9.2 is not applicable to contracts where personal data is not intended to be processed by the contractor, which can occur, for example: in logistics, most evaluation services, studies and translation services. Assessment on a case-by-case basis may be necessary. [↑](#footnote-ref-37)
38. This clause must be adapted with care on the basis of a risk assessment related to the processing of personal data for the relevant contract. [↑](#footnote-ref-38)
39. Regulation (EU) 2018/1725 of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC, OJ L 295/39, 21.11.2018, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1725&from=EN> [↑](#footnote-ref-39)
40. The sentence “*This Article is not applicable to this FWC*” must only be used for purchase of non-intellectual services such as cleaning or guarding services, relocation services, medical services, health insurance services, service car, access to databases services, press subscription, bank services or mediation services. For procurement of intellectual services Article I.10. is applicable and clauses I.10.1 to I.10.3 have to be kept in their entirety. Article II.13 in General Conditions is applicable in its entirety. Intellectual services are, for example: ICT services, Communication services such as audio-visual and photographic services, expert/consultancy services and interim services. [↑](#footnote-ref-40)
41. The Annexes are to be taken from the IPR explanatory note

    http://myintracomm.ec.testa.eu/budgweb/EN/imp/procurement/Documents/ipr-note-en.pdf or in Word version under ‘optional statements from Contractor regarding IPR’:

    <http://myintracomm.ec.testa.eu/budgweb/EN/imp/procurement/Pages/imp-080-030-010_contracts.aspx#1> [↑](#footnote-ref-41)
42. Delete the article if the contract is not interinstitutional. [↑](#footnote-ref-42)
43. Article I.14 (liquidated damages) is a standard clause and may need to be adapted to each specific purchase and each deliverable, depending on the potential delays and potential damage and provided that clear deadlines are indicated in the Technical Specifications or Specific Contract. [↑](#footnote-ref-43)
44. Please consult the competent LO for any substantial change to the model contract. [↑](#footnote-ref-44)
45. Clause I.15.[1] to be used in case of services provided by Personnel of the Contractor working within the premises of the Contracting Authority or in other specific cases. [↑](#footnote-ref-45)
46. In case of Specific Contract whose implementation entails access to sensitive information, and/or in case of Contractor’s Personnel working on a stable basis at F4E premises, it is recommended to sign a specific NDA at specific contract level (simultaneously with signature of the Specific Contract): NDA can be signed by the Contractor or by the natural person(s)-employee who carries out the services. In case this Article is used, it is recommended to attach to the FWC the applicable NDA template. Please consult the LO on this matter. [↑](#footnote-ref-46)
47. Where the Contractors relies on the capacities of other entities with regard to criteria relating to economic and financial capacity, the Contracting Authority may require that the Contractor and those entities be jointly liable for the performance of the Contract (art. 146, Par 5 of General RAP). In this circumstance, please refer to the competent LO as the clause must be complemented. [↑](#footnote-ref-47)
48. OJ L 94 of 28.03.2014, p. 65. [↑](#footnote-ref-48)
49. Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC, OJ L 119, 4.5.2016, p. 1, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2016.119.01.0001.01.ENG> [↑](#footnote-ref-49)
50. Regulation (EU) 2018/1725 of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC, OJ L 295/39, 21.11.2018, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1725&from=EN> [↑](#footnote-ref-50)
51. Article on reduction in price may only be used if clear quality standards per deliverable have been defined in the Technical Specifications (or Specific Contract) and the price reduction is easier to apply if a breakdown of price per deliverable has been requested. [↑](#footnote-ref-51)
52. Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012, OJ L 193 of 30.7.2018, p.1 <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1544791836334&uri=CELEX:32018R1046> [↑](#footnote-ref-52)
53. Council Regulation (EU) 2017/1939 of 12 October 2017 implementing enhanced cooperation on the establishment of the European Public Prosecutor’s Office. [↑](#footnote-ref-53)
54. Please see Art. I.6.6. and the relevant footnotes for further details. [↑](#footnote-ref-54)
55. It is recommended to discuss additional provisions with the LO, so as to avoid inconsistencies or ambiguities with the FWC. [↑](#footnote-ref-55)
56. ADVICE: The Order number follows this structure: F4E-[AMF]/[AFC] XXX.XX.XX. ‘F4E-[AMF]/[AFC]’ is the root for our administrative contracts. The next three digits (sometimes four) refer to the procurement number. The following two digits are the contract number (.01 for the first contract in a cascade, .02 for the second contract, etc.). If there is only one contract in the procurement procedure, the number will be .01. Finally, the last two digits refer to the Order Form number itself. For example, F4E-[AMF]/[AFC] -555.01.05 means it is the fifth Order Form implementing the first contract of administrative procurement 555. [↑](#endnote-ref-1)
57. ADVICE: Only fill in this box (‘Offer’) if applicable. [↑](#endnote-ref-2)
58. ADVICE: Choose SUPPLIES or SERVICES, as appropriate. Include a short description of the service or supply. [↑](#endnote-ref-3)
59. ADVICE: Use and fill in this column only if appropriate (e.g. kg or ton, cm or m). [↑](#endnote-ref-4)
60. ADVICE: Fill in this column only if appropriate. [↑](#endnote-ref-5)
61. ADVICE: Packaging, Insurance, Transport and Assembly are not applicable to services. [↑](#endnote-ref-6)
62. ADVICE: Note that Fusion for Energy is exempted from value added tax (VAT), for the delivery of goods and services for official use, if the amounts of each transaction is equal or higher than 300.05 €, VAT excluded. In this respect, please see Art. I.6.6 of the FWC and the relevant footnotes. [↑](#endnote-ref-7)
63. ADVICE: The Incoterms rules or International Commercial Terms are a series of pre-defined commercial terms published by the International Chamber of Commerce (ICC) that are widely used in International commercial transactions or Procurement processes. They deal with the transportation and delivery of goods and they are not mandatory but optional. In this case, if appropriate, it can be decided to make an Incoterm applicable. [↑](#endnote-ref-8)
64. VADEMECUM (section 4.13): “The Contractor must sign before contract implementation starts”. In any case the implementation of the contract cannot start before the signature by both parties. The order enters into force on the date on which the last party signs, unless a different date is expressly indicated in the order. [↑](#endnote-ref-9)
65. ADVICE: Only if appropriate. [↑](#endnote-ref-10)
66. ADVICE: Although the general rule with other types of contract is that the Contractor should sign first, in the case of Order Forms under FWCs the authorising officer may sign first to speed up delivery. [↑](#endnote-ref-11)
67. ADVICE: In order to know who is the relevant authorising officer, check the following link to the F4E Manual’s section on financial delegations: <http://f4emanual.f4eda.local/Administrative%20Manual%20Of%20Procedures/FinancialDelegations.aspx> [↑](#endnote-ref-12)