

**United States Energy Association**  
**Promoting Domestic and International Consensus on Fossil Energy Technologies**  
**(CONSENSUS)**

**Cooperative Agreement #DE-FE-002415-19**

**REQUEST FOR PROPOSALS (RFP)**

**DE-FE-002415-19-02**

**REQUEST FOR PROPOSALS**

**Workshop Series (3) on the Changing CCUS Market Space and 45Q**

**Questions Due: September 13, 2019**

**Proposals Due: October 4, 2019**

**Background**

Carbon Capture, Utilization, and Storage (CCUS) technologies will be essential to reducing global emissions of carbon dioxide (CO<sub>2</sub>). As of November 2018, there were over forty large-scale CCUS projects in various stages of planning, construction, or operation in a dozen countries. Though CCUS technologies are not yet fully commercially sustainable, the sale of CO<sub>2</sub>, produced and stored with CCS technology and coupled with tax credits for storage (geological or for enhanced oil recovery) provided under the modified section 45Q of the internal revenue code, will improve the economics of deploying the technology.

The pathway for using the 45Q tax credits will vary according to the CCUS stakeholder seeking to use them. These workshops will convene a diverse community of stakeholders including: government, academia, tax, legal, and financial experts to take stock of the status of CCUS project development and discuss the opportunities and benefits presented by the 45Q tax credits. Workshop participants will also learn how to utilize U.S. Department of Energy (DOE) resources, such as the National Energy Modeling System (NEMS) program and the Deployment Initiative, to obtain supporting data and insights.

**Scope of Work**

The United States Energy Association (USEA), in cooperation with the DOE Office of Fossil Energy, seeks proposals for a consultant to organize three workshops that will:

- Identify actual CCUS projects planning to employ the 45Q Tax Credit;
- Present analysis showing 45Q opportunities at various scales and structures utilizing the DOE NEMS analysis and insights/resources from the DOE Deployment Initiative

The consultant will organize three workshops that will present information on potential opportunities for CCUS projects to an audience of industry stakeholders, government officials, non-governmental organizations and other parties interested in the deployment of CCUS technology.

The consultant will recommend three cities in which to conduct the workshops. The host cities should possess a community of professionals and companies active in the CCUS value chain. Stakeholders may include, but are not limited to, project developers, infrastructure developers/operators, equity/debt finance entities, energy/project tax accounting firms, energy related legal services firms and energy tax attorneys.

When identifying the host city, it is advisable to consider the potential use of CO<sub>2</sub>-EOR in unconventional plays to enable stakeholders in the shale industry to participate in the workshops.

The Consultant will perform the following tasks:

1. Organize and convene three individual, full-day, CCUS-45Q workshops over a 90-day period. USEA will secure and fund the venue, provide support services and related logistics.
2. Choose three host cities that have either current or planned CCUS projects in proximity where knowledgeable local stakeholders are participating in the CCUS value chain (capture, transport, processing, storage, oil production, finance, EOR assets, environmental services, refinery, petrochemical and land). The host cities should also possess a concentration of the financial, tax accounting, and legal services community that would or could be involved in the use of the 45Q tax credit. (Host cities may include Midland, TX; Dallas, TX; Houston, TX; New Orleans, LA; Denver, CO; Chicago, IL; Corpus Christi TX; Cheyenne, WY; Columbus, OH; Wheeling, WV; Pittsburgh, PA; and Oklahoma City, OK, etc.)
3. Develop the content and agenda for each workshop.
4. Develop marketing materials, including web-based marketing, and market the workshops to the stakeholder community.
5. Define, source and invite the attendees with a goal of 75-120 attendees per program.
6. Define, source and invite key expert speakers qualified for the topic and agenda. USEA will provide guidance on desired experts.
7. Obtain permission from the speakers for public distribution of their presentations.
8. Within 30 days of the final workshop, provide a final report of no less than 20 pages including:
  - a. General observations and outcomes of discussions on issues and opportunities related to the use of the 45Q tax credit.
  - b. Identification of specific CCUS project opportunities and the potential benefits of using 45Q tax credits, observations on challenges to employing the 45Q credit, and discussions on overcoming the challenges.
  - c. An aggregated list of attendees and contact details, an aggregated list of speakers and contact details, and a file containing all presentations provided at the workshops in .pdf format.

USEA will provide guidance and inputs as needed to the contractor. The contractor will coordinate with USEA on logistics, content, experts and suitable locations and venues for the workshops.

The contractor will designate a primary contact to coordinate and provide monthly status updates via written high-level reports and conference calls between the contractor and USEA.

### Deliverables

The contractor will be required to submit the following deliverables:

- Written monthly status updates detailing progress to date, challenges and recommendations for overcoming them
- Draft and final agendas for each workshop
- Marketing materials for each workshop
- Draft workshop summary report for each workshop
- Final workshop summary report for each workshop

### Proposal Preparation

Interested parties are requested to submit a technical proposal of no more than 5 pages and a separate cost proposal. The technical proposal should include the following:

- Qualifications Statement demonstrating basic expertise and good understanding of the CCUS value chain (capture, transportation, utilization, storage) and knowledge of CO<sub>2</sub>-EOR, the 45Q tax credit, CO<sub>2</sub> capture technology, project development, infrastructure deployment, energy tax accounting, energy tax law, project finance, and carbon accounting. Knowledge of Federal-State policies regarding CCUS will be a plus.
- Demonstrate experience convening forums, workshops and conferences. Provide a list of workshops and conferences that the offeror has organized over the previous five years including: date, title, location, number of participants, and conference website.
- A resume for each person proposed to work under sub-agreement to USEA (appendix, not counted toward the technical proposal page limit)

The offeror must provide an expected timeline with proposed milestones and workflow leading to the deliverables.

The sub-agreement between USEA and the winning offer will be structured as a fixed sub-agreement for labor, fringe benefits and overhead. USEA will fund other direct costs, including travel (transportation, lodging and a U.S. Government approved daily meals and incidental allowance) directly for the contractor and speakers. USEA will also fund directly all allowable costs necessary to conduct the workshops, including rental of the venue, meeting packages, audio-visual requirements, name badges, etc.

The cost proposal should include an estimate of the number of trips required to organize and conduct each of the workshops. **DO NOT** include travel costs as USEA will fund this directly.

Labor costs should include a level of effort for each person proposed to work on this assignment, their daily loaded rate, and the total estimated charge for each individual proposed.

### **Selection Criteria**

The following criteria will be used to evaluate proposals:

40% -- Proven expertise in organizing and convening professional level forums, workshops and conferences.

30% -- Proven experience in, and knowledge of the CCUS value chain with a fairly broad existing related contact base and network. Knowledge of CO<sub>2</sub>-EOR, 45Q tax credit, CO<sub>2</sub> capture technology, project development, infrastructure deployment, energy tax accounting, energy tax law, project finance, carbon accounting and Federal-State policies per CCUS will be a plus.

30% -- Price

### **Schedule**

Interested parties are requested to register their interest prior via email to the following mailbox: [proposals@usea.org](mailto:proposals@usea.org). Registering interest will ensure you receive all notices and questions submitted by interested parties and the corresponding responses from USEA.

Questions on the terms of this request for proposals must be submitted prior to September 13, 2019 by email to the following mailbox: [proposals@usea.org](mailto:proposals@usea.org). All questions received and their corresponding responses and other RFP related announcements will be posted on the USEA website and distributed to parties registering interest in this RFPs.

Final proposals must be submitted by email by 5:00 pm on October 4, 2019 to the following mailbox: [proposals@usea.org](mailto:proposals@usea.org).

The review process will take up to 60 days. Notification will be sent to the selected offeror, at which point contract negotiations, including setting milestones and deliverable due dates, will commence.