



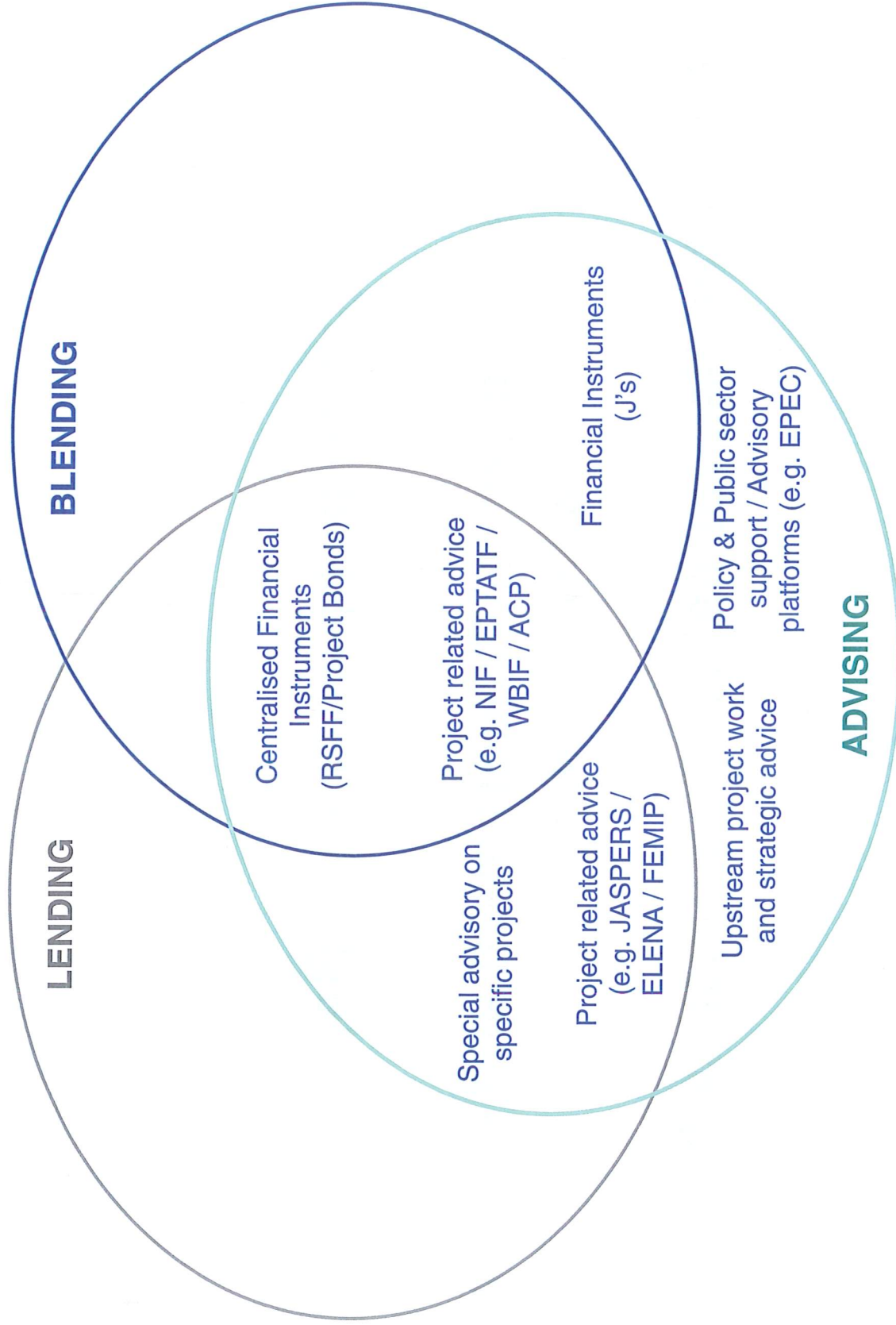
European Investment Bank

Technical Assistance, Procurement and Contract Management

Opportunities for Italian Consultancy firms!



EIB procurement for consultancy contracts





Objectives of the technical assistance funds from European Commission and EU Member States:

- **To help** the partner countries and private promoters to better prepare, manage and supervise their investment projects;
- **To improve** the quality and development impact of investment;
- **To strengthen** the management capacities of local partners in the medium and long term.



Areas in which technical assistance is provided:

- Studies or targeted activities upstream of lending operations in the areas of legislative, regulatory and institutional reform;
- Pre-feasibility or feasibility studies for investment projects (water and wastewater, energy, environment, transport and communications, education and health);
- Project Implementation.

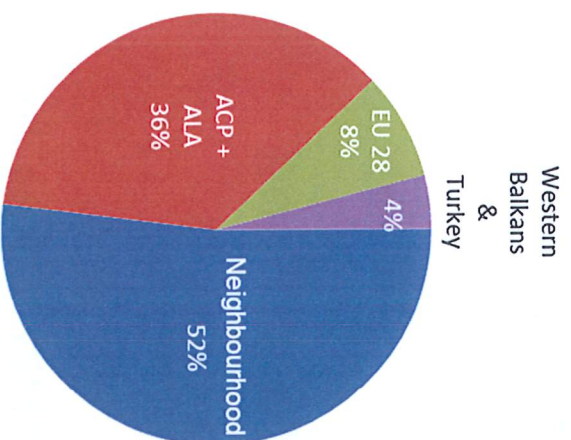


EIB procurement for consultancy contracts

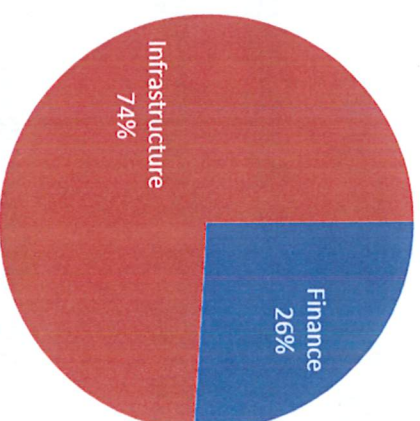


TA Allocation

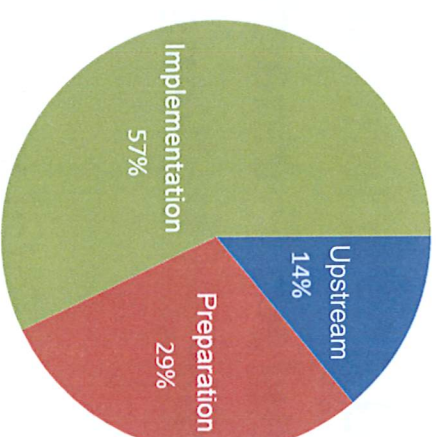
Region



Sector



Type





Existing TA facilities outside the EU

- FEMIP Support and Trust Fund
- Neighborhood Investment Facility (NIF) and NIF Trust Fund
- Cotonou TA + ".....IFs"
- EU Africa Infrastructure Trust Fund
- Eastern Partnership Technical Assistance Trust Fund
- Western Balkans Investment Framework (WBIF)

=> Total volume of consulting services: **EUR 30 m / year**



Major TA Facilities inside the EU

- JASPERS - Joint Assistance in Supporting Projects for European Regions
- JASMINE - Joint Action to Support Microfinance Institutions
- FITAP – Financial Instruments for Technical Advisory Platform
- ELENA - European Local Energy Assistance Facility
- Project Implementation Support in Bulgaria and Romania
- Support of EU Programmes on Energy Efficiency
- Etc.

=> Volume of consulting services: **EUR 20 m / year**



TA delivery through :

- EIB staff
- Consultants
- Third parties (Investment Fund Managers, International Organisations, EDFI's and Promoters)

=> Close cooperation with EC, MS, Bretton Woods Institutions, EDFI's and other development partners is crucial.



Organisation of TA activity within the EIB

- Lending Directorate
- Advisory Services Department / Technical Assistance Unit
- Projects Directorate
- Legal Directorate

TA business process follows lending as long as TA activity is related to investment operations.



Tendering procedures follow

- PRAG - Procurement and grants for EU external actions
- EIB Guide to Procurement
- EIB Guide for Procurement (own account)

In most cases, EIB is acting as contracting authority. Tender evaluation takes place in Luxembourg and panels are chaired by EIB.



Tender thresholds

- For technical assistance operations costing **less than EUR 300,000**, the EIB uses the competitive negotiated procedure; a framework contract is under preparation
- All contracts worth **EUR 300,000 or more** are awarded by restricted tender procedure following international publication in the Official Journal of the European Union



How to write a winning proposal?

- ✓ Instructions to tenderers
- ✓ Terms of Reference
- ✓ Evaluation Grid
- ✓ Bid management is crucial (consortia)
 - organisation & methodology
 - selection of key experts
 - financial proposal
 - presentation

Time to prepare a bid: 30-60 calendar days



How to write a winning proposal?

- Preparation starts as early as possible (contract forecast or even earlier)
- Prequalification (shortlisting) stage – enter into a consortium?
- Knowledge of local conditions improves substantially the technical offer (tailor-made proposal) but increases acquisition costs
- Tendering is a « beauty contest » - companies are capable to deliver but which company is capable to present the best offer?



TECHNICAL OFFER

Rationale Strategy Timetable of activities	
Key Experts Narrative presentation in the offer + CVs	

EVALUATION GRID

	Maximum
Organisation and methodology (Max x points)	
Rationale	10
Strategy	20
Timetable of activities	10
Total score for Organisation and methodology	40
Key experts	
Key expert 1 (Max x points)	
Qualifications and skills	5
General professional experience	10
Specific professional experience	15
Key expert 2 (Max x points)	
Qualifications and skills	2
General professional experience	2
Specific professional experience	6
Key expert 3 (Max x points)	
Qualifications and skills	2
General professional experience	2
Specific professional experience	6
Key expert 4 (Max x points)	
Qualifications and skills	2
General professional experience	2
Specific professional experience	6
Total score for Key experts	60
Overall total score	100



Structure and presentation of the technical offer should make the life of the evaluation committee easy

=> Form matters

=> Not too much text, use diagrams and photos

Technical compliance threshold is usually 80%. Weighting between technical and financial offer is usually 80/20.



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