

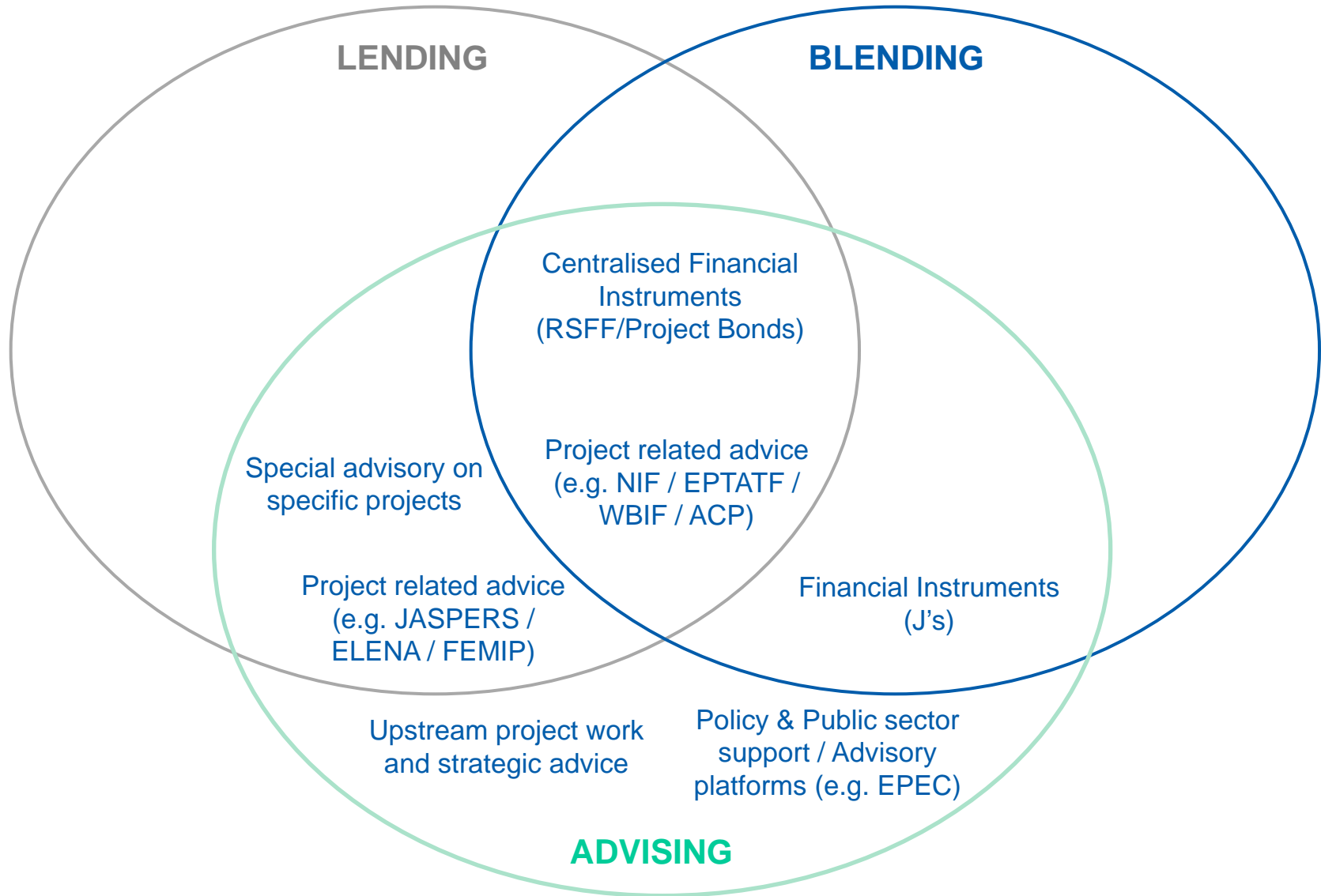


European Investment Bank

EIB procurement for consultancy contracts

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Head of EIB's Technical Assistance Unit
Berlin, 19 March 2015





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.



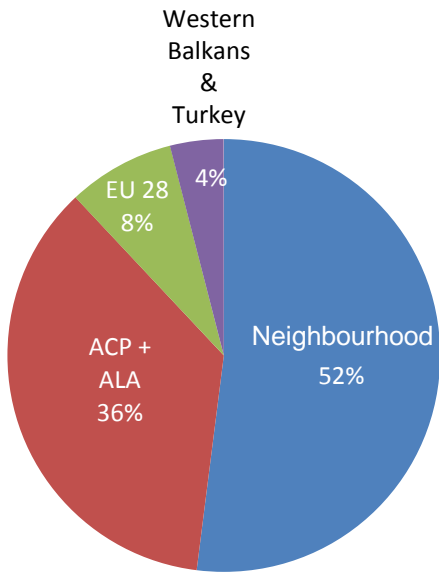
Areas in which technical assistance is provided:

- ❖ 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.

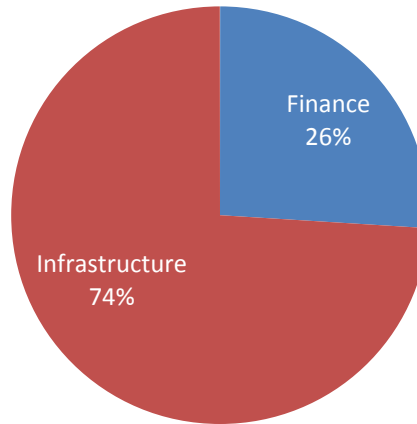


TA Allocation

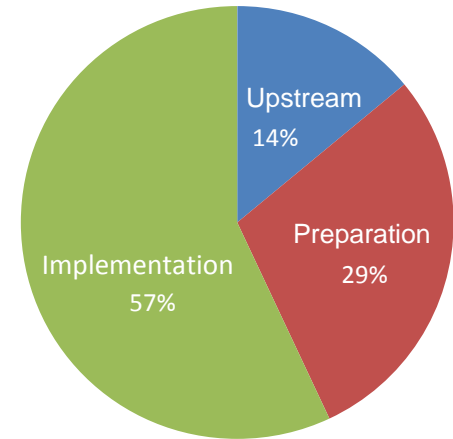
Region



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

EVALUATION GRID

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

	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.



Implementation of technical assistance activity – Key elements for success

- Needs assessment and high-quality terms of reference
- Strong partnership between EIB, Promoters and Consultants
- Continuous dialogue and regular meetings
- Quality of experts (from backstoppers to short-term experts) and reporting
- Transparency and professionalism



Thank you very much for your attention



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