

EVALUATION GRID

AA-011951-004

Gender-Smart Financing - Advisory and Capacity Building Programme for commercial banks

1. Technical evaluation

	Maximum
Organisation and methodology	
Rationale	20 points, of which
Any comments the Service Provider has on the Assignment Terms of Reference for the successful execution of activities, in particular regarding the objectives and expected results, thus demonstrating the degree of understanding of the contract. The Service Provider's opinion on the key issues related to the achievement of the contract objectives and expected results.	15 points
An explanation of the risks and assumptions affecting the execution of the contract together with reasonable mitigation measures.	5 points

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Strategy / Outline of the methodological approach proposed for contract implementation, including:	50 points, of which
<input type="checkbox"/> A list of the proposed activities considered to be necessary to achieve the contract objectives	10 points
<input type="checkbox"/> The related inputs and outputs	5 points
<input type="checkbox"/> In the case of a tender being submitted by a consortium, a description of the input from each of the consortium members and the distribution and interaction of tasks and responsibilities between them. Furthermore, the involvement of all members of the consortium will be considered added value in the tender evaluation. A description of sub-contracting arrangements foreseen, with a clear indication of the tasks that will be entrusted to a sub-contractor and a statement by the tenderer guaranteeing the eligibility of any sub-contractor. If the tender is submitted by a single company or does not foresee any sub-contracting arrangements, the total of available points for this part in the evaluation grid will be allocated.	10 points
<input type="checkbox"/> A description of the support facilities (backstopping) that the team of experts will have from the contractor during the execution of the contract	10 points
<input type="checkbox"/> The timing and sequence of activities and identification of major milestones in execution of the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the Terms of reference.	5 points
<input type="checkbox"/> Demonstration that the Service Provider has access to a comprehensive pool of non-key experts with professional profiles relevant to the scope of the assignment.	5 points
<input type="checkbox"/> Description of approach to ensure an effective mobilisation of the key and non key experts proposed during the implementation period of the contract	5 points
Total score for Organisation and methodology	70 points
Key experts	
Key expert 1 (Max 15 points)	
Qualifications and skills At least Bachelor's Degree in Economics, Law, Banking, Business Administration, or related disciplines (Minimum requirement)	1 point
General professional experience At least 10 years of professional experience working in or with the financial sector and/or in consultancy or advisory roles (Minimum requirement)	3 points

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Specific professional experience	10 points, of which
<input type="checkbox"/> At least 3 years of professional experience providing support or advisory services to financial institutions (Minimum requirement)	3 points
<input type="checkbox"/> Experience serving as Team Leader or Project Manager in at least 2 assignments, including responsibility for managing teams and coordinating multi-stakeholder project delivery (Minimum requirement).	2 points
<input type="checkbox"/> Demonstrated experience in gender-focused advisory work for financial institutions, evidenced by at least one assignment involving gender analysis of banks' portfolios, strategies, business models, delivery mechanisms, or capacity-building activities aimed at strengthening outreach to women entrepreneurs and women-owned/led companies (Minimum requirement).	3 points
<input type="checkbox"/> Previous experience working within, or advising, an EU commercial bank, ideally in SME banking, women's market programmes, or related product/segment development, will constitute an asset.	2 points
Language and other skills Fluency in written and spoken English is essential (CEFR C1) (Minimum requirement). Knowledge of other EU languages will constitute an asset.	1 point
Total score for the Key expert	15 points

Note: The key expert proposed will be evaluated depending on the level of fulfilment of the requirements set in the ToR.

The key expert will be scored against the requirements stated in the Terms of Reference. For the evaluation of the key expert, failure to meet the minimum requirements will result in the rejection of the Tender.

Minimum requirements: When the expert meets the minimum requirements and is technically acceptable (when he/she fulfils the minimum requirement set for a specific criterion described in the Terms of Reference), 80% of the maximum score foreseen for that criterion will be allocated. If the expert exceeds the minimum requirement described in the Terms of Reference for that criterion, a percentage between 81 and 100% of the maximum score foreseen for that criterion will be allocated, depending on by how much the expert exceeds the requirement.

Other requirements: When an expert meets the requirements set to constitute an asset (when they fulfil the requirement set for a specific criterion described in the Terms of Reference), 80% of the maximum score foreseen for that criterion will be allocated. If the expert exceeds the requirement set to constitute an advantage described in the Terms of Reference for that criterion, a percentage between 81 and 100% of the maximum score foreseen for that criterion will be allocated, depending on by how much the expert exceeds the requirement. If the expert's experience goes below the requirement described in the Terms of Reference for that criterion, they will be scored accordingly, a percentage below 80% will be allocated, depending on by how much the expert's experience is below the requirement set.

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As part of the technical evaluation, after the assessment of the technical offers, the Evaluation Committee shall interview the key experts proposed in the tenders that achieved **a minimum of 68 points or more** from the 85-point maximum score allocated to the Technical Offer (Organisation and Methodology and Key Expert).

Any tender falling short of the 68-point threshold will be automatically rejected.

The interviews shall be conducted via MS Teams and the date and time of these interviews will be confirmed or notified to the tenderers at least 5 working days in advance. If a tenderer is unable to participate in an interview by force majeure, a mutually convenient alternative date and time is arranged with the tenderer. If the tenderer is unable to participate in this second scheduled time, its tender will be eliminated from the evaluation process.

Interview	
The Evaluation Panel will evaluate proposed the key expert's analysis, preparation and level of understanding of the Assignment and its context and related challenges, his/her level of preparation for the assignment and his/her level of motivation and availability.	10
The Evaluation Panel will ask questions to assess: - relevancy of his/her examples/cases regarding previous tasks /work experience and challenges that he/she faced	5
Total score for Interview	15

Following the interview, the final technical score will be calculated (Score of the Organisation and Methodology and Key Expert + score of the Interview).

Only offers that achieve a final technical score of 80 points or more are declared 'technically accepted' (after interviews). Any tender falling short of the 80-point threshold will be automatically rejected.

Out of the tenders reaching the 80-point threshold, the best technical offer is awarded 100 points. The others receive points calculated using the following formula:

Technical score =
(final score of the technical offer in question / final score of the best technical offer) x 100.

2. Financial evaluation

Financial offers will have to include the following daily rates:

- A fixed daily rate exclusive of VAT for the Key Expert when performing services from the Service Provider's professional premises or from the expert's home office / (Daily rate A)
- A fixed daily rate exclusive of VAT for senior non-key Expert when performing services from the Service Provider's professional premises or from the expert's home office / (Daily rate B)
- A fixed daily rate exclusive of VAT for junior non-key Expert when performing services from the Service Provider's professional premises or from the expert's home office / (Daily rate C)

Financial offers will be evaluated on the basis of the calculation presented in section 15.3 (Evaluation of financial offers) of the Instructions to Tenderers (Section A of the Tender File).