

A. INSTRUCTIONS TO TENDERERS

Reference code: AA-011951-004

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

When submitting their tenders, tenderers must follow all instructions, forms, terms of reference and contract provisions contained in this tender dossier. Failure to submit a tender containing all the required information and documentation within the deadline specified may lead to the rejection of the tender.

When submitting their tenders, tenderers should not include any personal data beyond the information required in this tender dossier.

These instructions set out the rules for submitting, selecting and implementing contracts financed under this call for tenders, in conformity with the EIB's Corporate & Technical Assistance Procurement Guide (available on the internet at this address:

[EIB's Corporate & Technical Assistance Procurement Guide](#)

1. Services to be provided

The services required by the Contracting Authority are described in the Terms of Reference. They are set out in the Part B of this tender dossier.

2. Nature of contract

Time and material

3. Timetable

	DATE	TIME*
Site visit (if any)	Not applicable	Not applicable
Information meeting (if any)	Not applicable	Not applicable
Deadline for requesting clarifications from the Contracting Authority	04/05/2027	23:59 CET
Last date for the Contracting Authority to issue clarification	11/05/2027	-
Deadline for expression of interest	No later than 13/05/2026	23:59 CET
Deadline for receipt of tenders by the Contracting Authority (Closure Date)	18/05/2026	18:59 CET
Interviews (if any)	05/2026 [□]	-
Completion date for evaluating offers	06/2026 [□]	-
Notification of award	06/2026 [□]	-
Contract signature	06/2026 [□]	-
Start date	06/2026 [□]	-

* All times are in the time zone of the country of the Contracting Authority

□ Provisional date

4. Participation and subcontracting

- Participation is open to interested economic operators - participating either individually or in a grouping (consortium) of tenderers. Participation is also open to international organisations.
- No more than one tender can be submitted by an economic operator, whatever the form of participation (as an individual legal entity or as leader or member of a consortium submitting

a tender). In the event that an economic operator submits more than one tender, all tenders in which that person has participated will be excluded.

- c) Economic operators are not entitled to participate in this tender procedure or be awarded a contract if they are in any of the exclusion situations stipulated under Article 57 of European Parliament and Council Directive 2014/24/EU, or if they are target of a sanction or restrictive measure¹ imposed or administered by the European Union;² or the United States of America.
- d) Tenderers shall be excluded from this tender procedure if they are listed among the entities subject to restrictive measures (public interest trusts within the meaning of Article 2(2) of Council Implementing Decision (EU) 2022/2506 and any entities maintained by such a public interest trust).

Tenderers shall be excluded from this tender procedure if any of the mandatory exclusion grounds for rejection apply.

Tenderers may be excluded from this tender procedure if any of the discretionary grounds for exclusion apply.

Tenderers shall be excluded from this tender procedure if they have been recorded in the Early Detection and Exclusion System of the EC.

Tenderers shall be excluded from this tender procedure if they have been recorded on the list of EIB Exclusion Decisions.

- e) Subcontracting is allowed. If the tenderer intends to subcontract one or more parts of the contracted services, this must be clearly stated in the Organisation and Methodology and the Tender submission form.
- f) Even if subcontracting is allowed, the tenderer must intend to provide the majority of the services itself except for the tasks entrusted to experts either as natural persons or single-member companies. In this respect, note that the individual experts recruited for the project as key or non-key experts are not regarded as sub-contractors.
- g) Subcontractors cannot be in any of the exclusion situations stipulated under Article 57 of European Parliament and Council Directive 2014/24/EU or target of a sanction or restrictive measure imposed or administered by the European Union, or the United States of America.
- h) Whenever requested by the Contracting Authority, the successful tenderer/contractor shall submit a declaration from the intended subcontractor that it is not in one of the exclusion situations. In the event of doubt, the Contracting Authority shall request documentary evidence that the subcontractor is not in a situation of exclusion.
- i) If the offer includes subcontracting, it is recommended that the contractual arrangements between the tenderer and its subcontractors include mediation, according to national and international practices, as a method of dispute resolution.

Market access

Participation to this call for tenders is not limited and therefore open to all economic operators irrespective of the country of establishment (i.e. countries of the European Union, the European Economic Area and third countries)

5. Selection criteria

The following selection criteria will be applied to tenderers. In the case of tenders submitted by a consortium, these selection criteria will be applied to the consortium as a whole.

¹ Being “the target of a sanction or restrictive measure” means the economic operator (i) being listed on a sanctions list, or (ii) being (directly or indirectly) 50% or more (individually or on aggregate basis) owned or controlled by, or acting on behalf of or at the direction of, a person or entity listed on, any sanctions lists, or (iii) being located or resident in, or organised or incorporated under the laws of a Sanctioned Country, or owned or controlled by, or acting on behalf or at the direction of such a person or entity. A “Sanctioned Country” shall mean a country or territory that is, or whose government is, at any time, the target of comprehensive country or territory-wide sanction or restrictive measure imposed or administered by the competent authorities described in this sub-section (h).

² Pursuant to Chapter 2 of Title V of the Treaty on European Union or Article 215 of the Treaty on the Functioning of the European Union, either autonomously or pursuant to the sanctions decided by the United Nations Security Council on the basis of Article 41 of the UN Charter.

Relying on the capacity of other entities

With regard to criteria relating to economic and financial standing and to criteria relating to technical and professional ability, an economic operator could, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which it has with them.

With regard to economic and financial criteria, the entities upon whose capacity the tenderer relies **become jointly liable for the execution of the contract.**

With regard to technical and professional criteria, an economic operator may only **rely on the capacities of other entities where the latter will perform the works or services** for which these capacities are required. In this case, the bidder will describe in its strategy the terms of the commitment, clearly indicating the resources on which it intends to rely and the conditions under which the support will apply.

If the tenderer relies on the capacities of other entities, it must, in that case, prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, by producing a commitment (refer to the Letter of Undertaking model - Part C of this tender dossier) on the part of those entities to place those resources at its disposal. Such entities, for instance the parent company of the economic operator, must respect the same rules of eligibility and must fulfil the same relevant selection criteria as the economic operator. The Contracting Authority shall verify whether there are grounds for exclusion. The Contracting Authority shall require that the economic operator replaces an entity which does not meet a relevant selection criterion, or in respect of which there are compulsory grounds for exclusion. The Contracting Authority may require that the economic operator substitutes an entity in respect of which there are non-compulsory grounds for exclusion.

5.1 Economic and financial capacity of tenderer

Based on item 3 of the tender submission form. In case the tenderer (*leader or any of the members of the consortium*) is a public body, equivalent information should be provided.

The annual turnover of the tenderer (*individual legal entity or consortium overall*) must be of at least EUR 480,000 for each of the last 3 years for which accounts have been closed (2022, 2023, 2024).

Note to tenderers: *In the tender form, please make sure to specify the actual financial year(s) for which the data is provided.*

5.2 Professional capacity of tenderer

Based on items 4 and 5 of the tender submission form.

The reference period which will be taken into account will be the last **3 years** from submission deadline (2023, 2024, 2025).

- (a) The number of permanent staff of the tenderer (individual legal entity or consortium overall) having worked in fields related to this contract, must be at least **5** for each of the last 3 years (2023, 2024, 2025).

Note to tenderers: *In the tender form, please make sure to specify the actual year for which the data is provided.*

5.3 Technical capacity of tenderer

Based on items 5 and 6 of the tender submission form. The reference period which will be taken into account will be the last **3 years** from submission deadline.

- (a) The tenderer (individual company or consortium altogether) has implemented, during the last 3 years (Starting 01/01/2023 up to the deadline for the receipt of tenders indicated under item 11 below), at least **2 project(s)** of a minimum value of **EUR 50,000** equivalent, with activities related to:

i. advisory activities for financial institutions in the field of gender-responsive finance, including work aimed at improving access to finance for women entrepreneurs and/or women-owned/women-led businesses, and/or

ii. capacity building, and/or work for financial institutions in the field of gender-responsive finance, including work aimed at improving access to finance for women entrepreneurs and/or women-owned/women-led

businesses.

The tenderer should demonstrate that it had a participation of minimum 50% in each of the project(s) brought as reference.

- (b) The tenderer (individual company or consortium altogether) has implemented, during the last 3 years (2023 up to the deadline for the receipt of tenders indicated under item 11 below), at least **2 project(s)** of a minimum value of **EUR 150,000** equivalent, with activities related to:

- i.in-person awareness raising or knowledge sharing events, and/or
- ii.hybrid awareness raising or knowledge sharing events

The tenderer should demonstrate that it had a participation of minimum 50% in each of the project(s) brought as reference.

Note to tenderers: *the project references submitted in the relation to the above criteria for the Technical capacity of the tenderer must have been completed within the reference period (although started earlier).*

The tenderer may not refer to a part of a project/service contract which is not yet completed.

Where the projects referenced have been implemented by consortia comprising two or more of the members now associated as a consortium for this tender procedure, their respective percentages shall be added together, in order for the tender to be assessed on the basis of the consortium as a whole.

A single reference may be used to fulfil one or more criteria.

Please note that the number of references to be provided must not exceed 8.

Previous experience which caused breach of contract and termination by a Contracting Authority shall not be used as reference.

6. Award criteria

Best price-quality ratio.

7. Content of tenders

Offers, all correspondence and documents related to the tender exchanged by the tenderer and the Contracting Authority must be written in English.

Supporting documents and printed literature furnished by the tenderer may be in another language, provided they are **accompanied by a translation into the language of the procedure**. For the purposes of interpreting the tender, the language of the procedure has precedence.

The **tender must comprise a Technical offer and a Financial offer**, which must be **submitted in separate PDF files** (see item 11 below). Failure to fulfil the requirements in clauses 7.1, 7.2 and 11 will constitute an irregularity and may result in rejection of the tender.

7.1. Technical offer

The Technical offer must include the following documents:

The content of the technical offer should be structured as follows:

I. Administrative documents a **Tender Submission Form** accompanied by:

- o A signed **declaration** referred to in point 7 of the tender submission form from each legal entity identified in the tender submission form, using the format attached to the tender submission form (i.e. if the tenderer is a consortium, the consortium leader and every single consortium member shall provide a signed declaration).

- o A signed **Declaration of honour on exclusion and selection criteria** from each legal entity identified in the tender submission form, using the format attached to the tender submission form. (i.e. if the tenderer is a consortium, the consortium leader and every single consortium member shall provide a signed declaration).
- o A signed **Power of Attorney** from each legal entity identified in the tender submission form, using the format attached to the tender submission form. (i.e. if the tenderer is a consortium, the consortium leader and every single consortium member shall provide a signed Power of Attorney).
- o The **legal entity file** and supporting documents (in case of consortium, these documents should be provided by all the members). If the tenderer has already signed another contract with the EIB, it may provide instead either its legal entity number or a copy of the legal entity file provided on that occasion, unless it has changed its legal status in the meantime.
- o (when the tenderer relies on the capacities of other entities) A signed **Letter of Undertaking** and a **signed Declaration of honour on exclusion and selection criteria** from each legal entity involved.
- o Duly authorised signature: **an official document** (statutes, power of attorney, notary statement, etc.) proving that the person who signs on behalf of the tenderer is duly authorised to do so. (i.e. if the tenderer is a consortium, the consortium leader and every single consortium member shall provide such a document) Please highlight in the document, the place in where this authorisation is mentioned.

II. Organisation and methodology (will become Annex to the contract), to be drawn up by the tenderer using the following instructions:

Rationale

- Any comments on the Terms of reference of importance for the successful execution of activities, in particular its objectives and expected results, thus demonstrating the degree of understanding of the contract. An opinion on the key issues related to the achievement of the contract objectives and expected results.
- An explanation of the risks and assumptions affecting the execution of the contract together with reasonable mitigation measures.

Strategy

- A list of the proposed activities considered to be necessary to achieve the contract objectives
- The related inputs and outputs
- 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.
- A description of the support facilities (backstopping) that the team of experts will have from the contractor during the execution of the contract
- 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.
- 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.
- Description of approach to ensure an effective mobilisation of the key and non key experts proposed during the implementation period of the contract

III. Key expert (to become Annex to the contract). The key expert is the one whose involvement is considered to be instrumental to achieve the contract objectives. The key expert's position and responsibilities are defined in the Terms of Reference and the candidate for the position is subject to evaluation according to the evaluation grid in Part D of this tender dossier.

Part C of this tender dossier contains the templates that tenderers must use, including:

- a) the CV of the key expert. Tenderers are encouraged to limit the number of pages of the CV to 5 pages. Only one CV must be provided for the position of key-expert.

The qualifications and experience of the key expert must clearly match the profile indicated in the Terms of Reference. If the expert does not meet the requirements for each evaluation criterion (i.e. qualification, general professional experience, specific professional experience, language and other skills), he/she will be assessed accordingly (see the note below at 15.2).

- b) Tenderers must provide the following documents for the key expert proposed:

- a copy of the diplomas mentioned in the CV,
- a copy of employer certificates or references proving the professional experience indicated in the CV.

Only diplomas and documented experience will be taken into account. Previous experience which caused breach of contract and termination shall not be used as reference.

If the documentary evidence submitted is not written into the language of the procedure, a translation into this language must be attached.

Tenderers are reminded that the provision of false information in this tender procedure may lead to the rejection of their tender and to their exclusion from EIB tender procedures and contracts.

- c) Tenderers must provide the following documents for the key expert proposed:

- For the expert: Signed **statement of exclusivity and availability**

NB: for the key expert, the purpose of the statements of exclusivity and availability are the following:

- ☐ The key expert proposed in this tender must not be part of any other tender submitted for this tender procedure. e/she must therefore commit himself/herself exclusively to the tenderer.
- ☐ The key expert must also undertake to be available, able and willing to work for the whole period scheduled for their input to implement the tasks set out in the Terms of Reference and/or in the Organisation and methodology.

The expert may participate in parallel tender procedures but must inform the Contracting Authority of these in the Statement of Exclusivity and Availability.

If a key expert is proposed as a key expert by more than one tenderer with the agreement of the key expert, the corresponding tenders will be rejected. The same applies if the key expert proposed has been involved in the preparation of the current assignment. The expert concerned will be excluded from this tender procedure and may also be excluded from other EIB-financed contracts.

Having selected a firm partly on the basis of an evaluation of the key expert presented in the tender, the Contracting Authority expects the contract to be operated by this specific expert. However, after the award letter, the selected tenderer may propose replacements for the key expert under certain conditions (for further information see point 19).

The technical offer shall include:

- One (1) PDF file including the Tender Submission Form
- One (1) PDF file for each legal entity constituting the tenderer, including:

- a signed declaration referred to in point 7 of the tender submission form
- a signed Declaration of honour on exclusion and selection criteria
- a signed Power of Attorney
- legal entity file and supporting documents
- Document evidencing duly authorised signature
- (when the tenderer relies on the capacities of other entities): One (1) PDF file including a signed Letter of Undertaking and a signed Declaration of honour on exclusion and selection criteria from each legal entity involved.
- One (1) PDF file including evidence related to the selection criteria set for economic and financial capacity mentioned in section 3 of the application form
- For each reference related to the selection criteria set for the experience mentioned in section 6 of the application form, one (1) PDF file named after the selection criterion with which it complies (i.e. Evidence for ref. n1, Evidence for ref. n2, Evidence for ref. n3, Evidence for ref. n4., etc). For each reference, the file shall include:
 - Evidence of the value of the consultancy service provided.
 - Evidence of completion of the consultancy services.
 - Evidence of the start date and completion date of the consultancy services provided
 - Evidence of the identity of the legal entity having implemented the services

The first page of the PDF document shall repeat the name of the file (i.e. Evidence for ref. n1), and shall list the documents provided to support the required evidence (i.e. completion certificate provided by the Contracting Authority and/or copy of the contract with the Contracting Authority and/or copy of invoices submitted to the Contracting Authority along with copy of bank account statement confirming proof of payment, etc.)

Nota Bene:

(i) For each reference, candidates will be expected to provide the required evidence in writing form.

(ii) A letter/e-mail issued by the client including the required information will be accepted, provided that it also clearly identifies the client, the name of the project (as mentioned in the reference fiche included in the application file). Ideally, the document shall also include information on the nature of the services performed.

(iii) The copy of a contract will be accepted to evidence the identity of the client, the identity of the legal entity having performed the services, when applicable, the start date of the assignment and the scope of the services. It will not confirm that the services have been completed and will not evidence the end date of the services or the final amount paid to the Service Provider.

(iv) The information which will be taken into account for the purpose of establishing the value of services performed is the final amount paid for the performance of the services.

(vi) When an invoice or a series of invoices include all required information (Project name, Contracting Authority, legal entity contracted, entry into force of contract, date of completion of contract, value of services contracted, amounts already paid, balance left to be paid, etc.), they can be considered sufficient to fulfil the requirements, provided that they are accompanied by bank statements confirming that they have been paid / processed.

If the documentary evidence submitted is not written into the language of the procedure, a translation into this language must be provided.

- One (1) PDF file including the Organisation and methodology

- One (1) PDF file including the CVs of the key expert, signed statement of exclusivity and availability and documentary evidence of the elements shown in the CVs diplomas and documented experience

If the documentary evidence submitted is not written into the language of the procedure, a translation into this language must be attached. Documentary proof or statements may be in original or copy. If copies are submitted, the originals must be available to send to the Contracting Authority upon request.

Tenderers are reminded that the provision of false information in this tender procedure will lead to the rejection of their tender and to their exclusion from EIB tender procedures and contracts.

7.2. Financial offer

Tenderers are reminded that the maximum budget available for this contract, as stated in the contract notice, is **EUR 1,000,000** for the performance of Services to be provided from the entry into force of the Contract until 24 months from its entry into force.

Should the Contract be renewed, the amount payable paid to the Service Provider could be increased up to EUR 500,000 for each renewal. The maximum total expenditure by the Bank under the Contract shall not exceed EUR 2,000,000, excluding VAT and including expenses, price indexation and all renewals. Payments under this contract will be made in the currency of the tender.

The Financial offer must be presented in Euro and must include the following information (using the template part C of this tender dossier):

- (i) A fixed daily rate exclusive of VAT for the performance of services by the Key expert when working from the Service Provider's professional premises or from the expert's home office.
- (ii) A fixed daily rate exclusive of VAT for the performance of services by junior non-key experts when working from the Service Provider's professional premises or from the expert's home office.
- (iii) A fixed daily rate exclusive of VAT for the performance of services by senior non-key experts when working from the Service Provider's professional premises or from the expert's home office.

NB: For the performance of services by all junior non-key experts when working from the Service Provider's professional premises or from their home office, the Service Provider will be remunerated the same fixed daily rate.

NB2: For the performance of services by all senior non-key experts when working from the Service Provider's professional premises or from their home office, the Service Provider will be remunerated the same fixed daily rate.

The rates shall be fixed and non-revisable for the first two years of the Contract (the "**Fixed-Pricing Period**"), following which an annual indexation will apply provided one of the Parties has requested it in writing within 3 (three) months before the end of the Fixed-Pricing Period. Annual indexation will be in accordance with the EU 27 HICP – Harmonised index of consumer prices, as published by the Statistical Office of the European Communities, using the following formula:

$$R_i = \frac{R_o \times I_i}{I_o}$$

I_o

R_o : Current price

R_i : New price

I_o : [EU 27 HICP/●] index of the month of the Tender or of the last indexation exercise.

I_i : [EU 27 HICP/●] index of the month in which the application for revision was made.

8. Variant solutions

Tenderers **are not** authorised to tender for a variant in addition to this tender.

9. Period during which tenders are binding

Tenderers are bound by their tenders for 180 days after the deadline for submitting tenders.

The Contracting Authority may ask the tenderers to extend the period for a specific number of days, as deemed necessary.

10. Additional information before the deadline for submitting tenders

The tender dossier should be clear enough to avoid tenderers having to request additional information during the procedure.

Tenderers may submit questions in writing **by the deadline specified in item 3 above** exclusively via an email to the following addresses: eib-cpcm-procurement@eib.org and p.cecconi@eib.org.

Questions shall be submitted by the deadline specified above.

The Contracting Authority has no obligation to provide clarification to requests transmitted after this date.

The Contracting Authority will publish the answers to the questions on the internet address where the tender dossier is published (<https://www.eib.org/en/about/procurement/calls-technical-assistance/all/aa-011951004>) by the deadline specified in item 3 above and at least by 6 calendar days before the deadline for submission of tenders.

Tenderers are strongly advised to regularly visit the above-mentioned website for potential changes in the tender dossier or answers to questions submitted.

Any tenderer seeking to arrange individual meetings with the Contracting Authority and/or the Promoter concerning this contract during the tender period may be excluded from the tender procedure.

No information meeting and no site visit is foreseen. Visits by individual prospective tenderers during the tender period cannot be organised by the Contracting Authority or the Promoter.

11. Submission of tenders

Tenders must be submitted electronically through the Sharepoint platform of EIB as described above separate PDF files, (as many as relevant) for the Technical Offer and one (1) for the Financial Offer. **All files shall be password protected.**

All files submitted as part of the Technical Offer shall be protected by the same password.

The file for the Financial Offer shall be protected by a different password.

The passwords shall not be communicated to the EIB upon submission in order to ensure that no-one can have access to data transmitted.

As indicated above at item 3. Timetable, the deadline for receipt of tenders by the Contracting Authority is <18/05/2026> at <18:59>.

Tenderers must express their interest by e-mail to the following address: eib-cpcm-procurement@eib.org until the <13/05/2026> at <23:59> at the latest in order to receive the access to the Sharepoint platform.

After the deadline for receipt of tenders by the Contracting Authority, Tenderers must communicate by e-mail at the e-mail address: eib-cpcm-procurement@eib.org the password for the Technical Offer files **only**. The communication must be no later than the date for the tendering opening <19/05/2026> at <10:00>.

The password for the Financial Offer file shall not be communicated to the EIB upon submission. The Tenderers must communicate the password for the Financial Offer file only when requested by the Contracting Authority.

Tenders submitted by any other means will not be considered.

Any infringement of these rules (e.g. unprotected files or references to price in the technical offer) constitutes an irregularity which will lead to rejection of the tender.

12. Amending or withdrawing tenders

Tenderers may amend or withdraw their tenders on the EIB's Sharepoint platform prior to the deadline for submitting tenders. Tenders may not be amended after this deadline and the access to the platform will be deactivated after the deadline for submission.

13. Costs for preparing tenders

No costs incurred by the tenderer in preparing and submitting the tender are reimbursable. All such costs must be borne by the tenderer, including the cost of interviewing proposed experts.

14. Ownership of tenders

The Contracting Authority retains ownership of all tenders received under this tendering procedure. Consequently, tenderers do not have the right to have their tenders returned to them.

15. Evaluation of tenders

15.1. Compliance with the selection criteria

The compliance of the tenderers with the requirements of the selection criteria (see item 5 of these Instructions to tenderers) will be analysed at the beginning of the evaluation process. Non-compliance will lead to the rejection of the tender.

15.2. Evaluation of technical offers

For the offers submitted by tenderers fulfilling the selection criteria, the quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid included in Part C of this tender dossier. No other award criteria will be used.

Note for the evaluation of the key expert: The Key Expert will be scored against the requirements stated in the Terms of Reference.

If an expert does not meet the criteria set as minimum requirements in the Terms of Reference, the key expert will be considered technically "Not Acceptable" and therefore, the Tender will be considered not compliant and will be rejected.

For the evaluation of the key expert, the 80% will serve as a guideline. This means that when the Key Expert is technically acceptable on a particular criterion (when he/she fulfils the requirement for that criterion as it is described in the Terms of Reference), 80% of the maximum score foreseen for that criterion will be allocated. If the expert exceeds the 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. For criteria which are not set as minimum requirements and which constitute an asset, if the expert's experience goes below the requirement described in the Terms of Reference for that criterion, he/she will be scored accordingly, a percentage below 80% will be allocated, depending on by how much the expert's experience is below the requirement.

Only offers that achieve a score of 68 points (out of the maximum 85-point score) or more are declared 'technically accepted' (before interviews). Any tender falling short of the 68-point threshold will be automatically rejected.

15.2.1. Interviews

As part of the technical evaluation, after the assessment of the technical proposals, the Evaluation Committee shall interview the key expert proposed in the tenders that achieved 68 points or more from the maximum score allocated to the Organisation and Methodology and Key Expert.

The interview shall be conducted by **MS Teams** and the date and time of these interviews will be confirmed or notified to the tenderer at least **five 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.

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.

15.3. Evaluation of financial offers

Upon completion of the technical evaluation, the PDF file containing the financial offers for tenders that were not eliminated during the technical evaluation will be opened (i.e. those with an average score of 80 points or more).

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 following calculation:

Daily rate A* Number of staff days offered in the O&M of the Tender for the key expert
+
Daily rate B* Number of staff days offered in the O&M of the Tender for Senior Non-Key Experts
+
Daily rate C* Number of staff days offered in the O&M of the Tender for Junior Non-Key Experts
+
250,000 EUR (amount dedicated to expenses eligible for reimbursement)
=
Financial Offer.

Financial Offers exceeding the maximum budget available for the contract (1,000,000 EUR) are unacceptable and will be rejected.

The tender with the lowest Financial Offer receives 100 points. The others are awarded points by means of the following formula:

Financial score = (lowest financial offer / financial offer of the tender being considered) x 100.

Any arithmetical errors are corrected without penalty to the tenderer such that, if there is a discrepancy between a fee rate and the total amount derived from multiplying the fee rate by the corresponding number of working days, the fee rate as quoted must prevail, unless the opinion of the Evaluation Committee contains an obvious error in the fee rate, in which event the total amount as quoted must prevail and the fee rate must be corrected.

16. Choice of selected tenderer

The best price-quality ratio is established by weighing technical quality against price on an <80/20> basis.

This is done by adding:

- the technical scores awarded to the technical offers multiplied by 0.80
- and
- the financial scores awarded to the financial offers multiplied by 0.20.

17. Confidentiality

The entire evaluation procedure is confidential. The Evaluation Committee's decisions are collective and its deliberations are held in closed session. The members of the Evaluation Committee are bound to secrecy. The evaluation reports and written records, in particular, are confidential and may be communicated neither to the tenderers nor to any party other than the Contracting Authority, the European Commission, the European Anti-Fraud Office and the European Court of Auditors.

18. Ethics clauses / Corruptive practices

- a) Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the Evaluation Committee or the Contracting Authority during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its tender and may result in administrative penalties.
- b) The tenderer must not be affected by any conflict of interest and must have no equivalent relation in that respect with other tenderers or parties involved in the current assignment.
- c) The European Investment Bank reserves the right to suspend or cancel project financing if corrupt practices of any kind are discovered at any stage of the award process or during the execution of a contract. For the purposes of this provision, 'corrupt practices' are the offer of a bribe, gift, gratuity or commission to any person as an inducement or reward for performing or refraining from any act relating to the award of a contract or execution of a contract already concluded with the Contracting Authority.
- d) Tenders will be rejected or contracts terminated if it emerges that the award or execution of a contract has given rise to unusual commercial expenses. Such unusual commercial expenses are commissions not mentioned in the main contract or not stemming from a properly concluded contract referring to the main contract, commissions not paid in return for any actual and legitimate service, commissions remitted to a tax haven, commissions paid to a payee who is not clearly identified or commissions paid to a company which has every appearance of being a front company.
- e) The Contracting Authority reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities or fraud. If substantial errors, irregularities or fraud are discovered after the award of the Contract, the Contracting Authority may refrain from concluding the Contract.

19. Signature of contract

19.1. Notification of award

The successful tenderer will be informed in writing that its tender has been accepted.

The successful tenderer shall then confirm availability or unavailability of their key-experts within 5 days from the date of the notification of award.

In case of unavailability the tenderer will be allowed to propose replacement key-expert(s). The successful tenderer shall give due justification for the exchange of the key-expert but the acceptance will not be limited to specific cases. Several replacement key-experts may be proposed but only one time-period of 15 days from the date of the notification of award will be offered. The replacement key-expert(s) cannot be an expert proposed by another tenderer in the same call for tender.

The replacement key-expert's total score must be at least as high as the scores of the key-expert proposed in the tender. It must be emphasised that the minimum requirements for each evaluation criteria must be met by the replacement expert.

If replacement key-experts are not proposed within the 15 days delay or if the replacement experts are not sufficiently qualified, or that the proposal of the replacement key-expert amends the award conditions which took place, the Contracting Authority may decide to award the contract to the

second best technically compliant tenderer (also giving them a chance to replace a key-expert should he/she not be available).

Should the Contracting Authority learn that a tenderer has confirmed the availability of a key expert and signed the contract although the tenderer has deliberately concealed the fact that the key-expert is unavailable from the date specified in the tender dossier for the start of the assignment, the Contracting Authority may decide to terminate the contract on the basis of article 18 of the General Terms and Conditions.

Documentary evidence required from the successful tenderer

Before the Contracting Authority signs the contract with the successful tenderer, the latter must provide the additional information and documentary evidence listed below.

Documentary proof or statements required under the law of the country in which the company (or each of the companies for consortia) is effectively established, to show that it is not in any of the exclusion situations stipulated under Article 57 of European Parliament and Council Directive 2014/24/EU. This evidence, documents or statements must be dated, no more than one year before the date of submission of the tender. In addition, a statement must be furnished stating that the situations described in these documents have not changed since then.

If the nature of your entity is such that it cannot fall into the exclusion situations and/or cannot provide the documents indicated above (for instance, national public administrations and international organisations), please provide a declaration explaining this situation.

The Contracting Authority may waive the obligation of any tenderer to submit the documentary evidence referred to above if such evidence has already been submitted for the purposes of another procurement procedure, provided that the issue date of the documents does not exceed one year and that they are still valid. In this case, the tenderer must declare on his/her honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that his/her situation has not changed.

If the documentary evidence submitted is not written into the language of the procedure, a translation into this language must be attached. Documentary proof or statements may be in original or copy. If copies are submitted, the originals must be available to send to the Contracting Authority upon request.

If the successful tenderer fails to provide the documentary evidence listed above within 15 calendar days following the notification of award or if the successful tenderer is found to have provided false information, the award will be considered null and void. In such a case, the Contracting Authority may award the tender to another tenderer or cancel the tender procedure.

19.2. Signature of the contract(s)

Within 30 days of receipt of the contract, the selected tenderer shall sign and date the contract and return it to the Contracting Authority.

Failure of the selected tenderer to comply with this requirement may constitute grounds for annulling the decision to award the contract. In this event, the Contracting Authority may award the tender to another tenderer or cancel the tender procedure.

The other tenderers will, at the same time as the notification of award is submitted, be informed that their tenders were not retained by standard letter, including an indication of the relative weaknesses of their tender by way of a comparative table of the scores for the winning tender and the unsuccessful tender. The second-best tenderer is informed of the notification of award to the successful tenderer with the reservation of the possibility to receive a notification of award in case of inability to sign the contract with the first ranked tenderer. The validity of the offer of the second-best tenderer will be kept. The second tenderer may refuse the award of the contract if, when receiving a notification of award, the validity of their tender has expired.

The Contracting Authority will furthermore, at the same time, also inform the remaining unsuccessful tenderers and the consequence of these letters will be that the validity of their offers must not be retained.

The corresponding contract award notice will be published on the website <http://ted.europa.eu/TED/main/HomePage.do>.

20. Cancellation of the tender procedure

In the event of cancellation of the tender procedure, the Contracting Authority will notify tenderers of the cancellation.

Cancellation may occur, for example, where:

- the tender procedure has been unsuccessful, i.e., no suitable, qualitatively or financially acceptable tender has been received or there is no valid response at all;
- there are fundamental changes to the economic or technical data of the project;
- exceptional circumstances or force majeure render normal performance of the contract impossible;
- all technically acceptable tenders exceed the financial resources available;
- there have been substantial errors, irregularities or frauds in the procedure, in particular if they have prevented fair competition;
- the award is not in compliance with sound financial management, i.e. does not respect the principles of economy, efficiency and effectiveness (e.g. the price proposed by the tenderer to whom the contract is to be awarded is objectively disproportionate with regard to the price of the market);

In no event shall the Contracting Authority be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a tender procedure, even if the Contracting Authority has been advised of the possibility of damages. The publication of a contract notice does not commit the Contracting Authority to implement the programme or project announced.

21. Privacy Statement

During a Public Procurement procedure the EIB may get access to certain personal data (information related to an identified or identifiable natural person). EIB's Privacy statement, available at <https://www.eib.org/en/privacy/procurement.htm>, provides information about the collection and use of personal data in the context of procurement procedures.

22. INVESTEU PUBLICATION OF DATA

The EIB will publish annually on its website no later than 30 June of each year the information detailed below on Service Providers³ supported through the Action⁴ since 4 March 2022 until the end of the previous calendar year. Information on Service Providers whose relevant Service Contract⁵ ended which were no longer supported under the Action as of 1 January of the previous calendar year shall not be published.

For natural persons, the published information shall be removed (i) as specified in the preceding; or (ii) two years after the end of the financial year when the relevant contract was signed, if earlier.

The publication requirements referred to above shall include the name, nature and purpose of the Action and a list of the relevant Service Contracts exceeding EUR 15 000 (fifteen thousand euros) concluded by the EIB, containing the name and address of the relevant Service Provider, the value of the relevant Service Contract awarded, and the nature and purpose of that Service Contract. For natural persons the name might be replaced by "natural person" and the address shall be replaced by the locality.

Any contractual counterpart of the EIB which is subject to publication of data pursuant to the above may, prior to receiving financing from the EU Contribution under the Action, request in writing (including by a representation in the relevant agreement) for the publication requirements set out herein to be waived. Such request shall be made on the basis of an adequate written justification

³ "Service Provider" means the natural or legal person (or an association thereof, whether formal or informal) with which the EIB concludes a Service Contract in the implementation of the Action.

⁴ "Action" means the set of activities - under or in connection with the InvestEU Advisory Hub and within the framework set out in Article 25(1) of the InvestEU Regulation - to be performed by the EIB as entrusted entity.

⁵ "Service Contract" means an agreement entered into between the EIB and a Service Provider pursuant to a public procurement procedure and under which the Service Provider delivers services for the purpose of implementing the Action.

to be annexed to or included in the relevant agreement and to be kept on record for possible assessment by the Commission and by the EIB, if such publication risks harming its commercial interests or risks threatening the rights and freedoms of individuals concerned as protected by the Charter of Fundamental Rights of the European Union. In addition, such publication shall not be required if it would be illegal under the applicable laws and regulations.

As far as natural persons are concerned, the publication shall comply with the requirements set out in Articles 4 and 5 of Regulation (EU) 2018/1725 of the European Parliament and of the Council 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 (OJ L 295, 21.11.2018, p. 39). Where the contractual counterpart of the EIB under the Action (notably a Service Provider) is a natural person, prior consent to publication may not be made as condition for receiving financial support from the EU Contribution under the Action. A declaration to this effect may therefore be issued by a natural person also after the award of financing from the EU Contribution under the Action.

By submitting an offer, the Service Provider agrees that, in case of award of the contract, the EIB can publish its information in its website in line with the provisions detailed above.

23. Additional information

- The Tenderer is expected to quote the daily rates offered net of any taxes.

Under article 21 of the Protocol of the Privileges and Immunities of the European Union ([C_2012326EN.01020101.xml \(europa.eu\)](#)) and article 151(b) of Council Directive 2006/112/EC on the common system of value added tax, the EIB benefits from VAT exemption on its purchases in Member States of the European Union. In its capacity as a Community body, the EIB is not liable to VAT and consequently has no VAT number. An intra-Community VAT exemption certificate (15.10 form) may be provided to you, should you require such document to enable you to justify to the local tax authorities the issuing of an invoice excluding VAT.

At the same time, note that – even if local tax exemption is obtained – any equipment procured/imported in the beneficiary country/ies to facilitate the technical assistance operation, and which will remain the property of the Contractor after the end of the period of implementation of the contract, might be subject to payment of (residual) local taxes and such taxes are not to be invoiced to the Contracting Authority.

- Any dispute concerning procurement conducted by the EIB would fall under the jurisdiction of the European Court of Justice.

24. Scope for additional services

The Contracting Authority may, at its own discretion and subject to the availability of funding, extend the scope and duration of the project to cover additional services.

Any extension and or increase of the contract would be subject to satisfactory performance by the Service Provider.