



STRATEGIC PROCUREMENT ROADMAP

PUBLIC SECTOR OPERATIONS
OUTSIDE THE EU

Business outreach &
consultation

Den Hague, Netherlands

31 October 2025

Projects Directorate – Procurement Office

THE EIB

THE BANK OF THE EUROPEAN UNION

Improving lives in Europe and beyond

- One of the world's major multilateral lenders
- Leading provider of climate finance
- Governed by the EU Member States





EIB AT A GLANCE

ONE OF THE WORLD'S MAJOR MULTILATERAL LENDERS AND BORROWERS

- We raise our funds on the international capital markets.
- We pass on favourable borrowing conditions to clients.

OVER €1.5 TRILLION INVESTED SINCE 1958

- More than **14 000 projects** in **over 160 countries**.
- Crowding-in bank: **€4.9 trillion** overall investment supported.

HEADQUARTERED IN LUXEMBOURG

- Over **4 200 staff**: finance professionals, engineers, economists and socio-environmental experts.
- **60 offices** around the world.

OUR PRIORITIES



CLIMATE ACTION AND ENVIRONMENTAL SUSTAINABILITY



DIGITALISATION AND TECHNOLOGICAL INNOVATION



SECURITY AND DEFENCE



A MODERN COHESION POLICY



AGRICULTURE AND BIOECONOMY



SOCIAL INFRASTRUCTURE



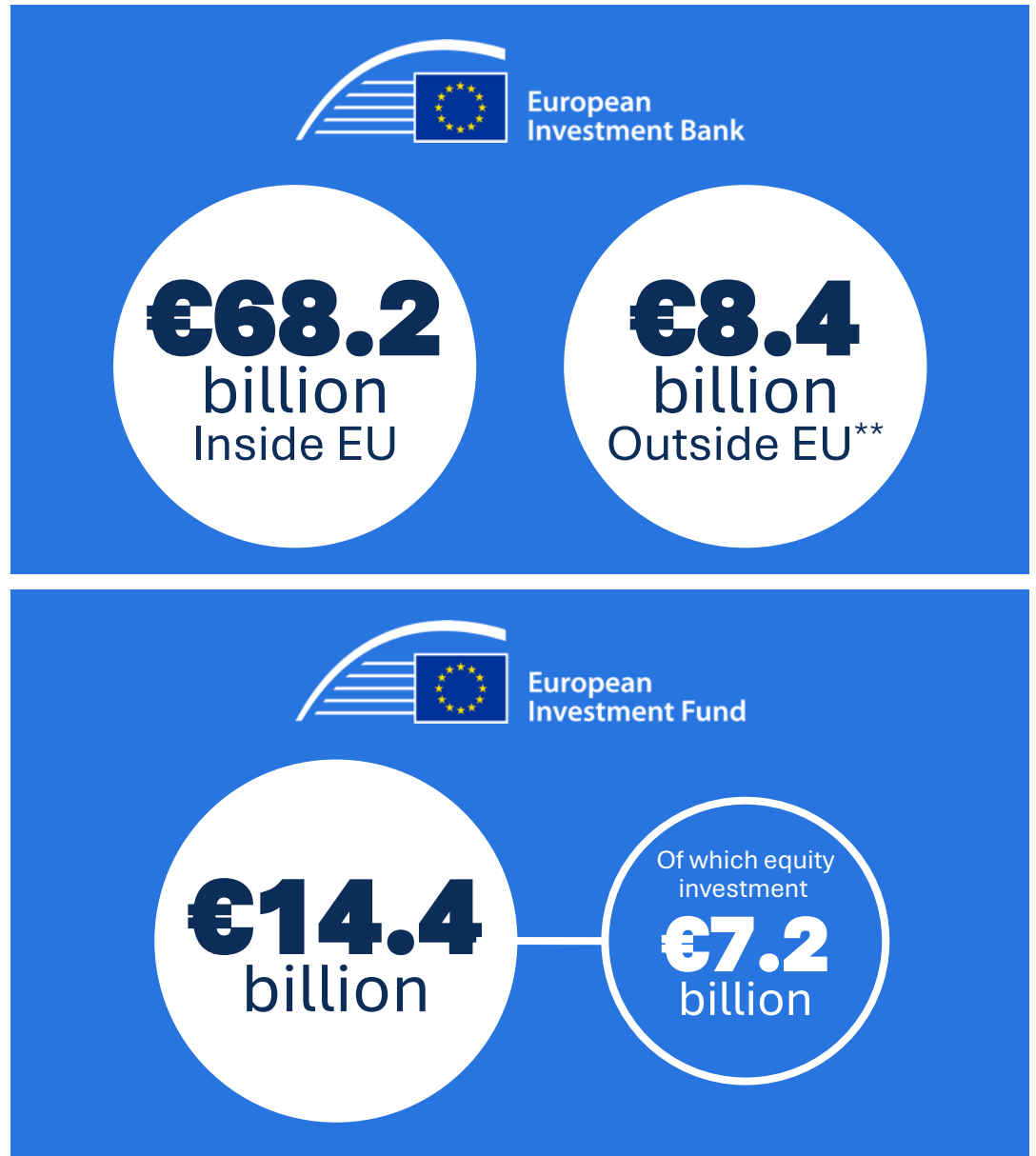
HIGH-IMPACT GLOBAL INVESTMENT



CAPITAL MARKETS UNION

EIB GROUP FINANCING IN 2024*

€88.8 billion



All figures are unaudited and provisional, refer to signatures and are for the EIB Group unless otherwise specified.

*The EIB Group total financing figure excludes an overlap due to joint engagements of the EIB and the EIF.

** This figure includes EIB Global's engagement in mid and low-income countries, as well as EFTA countries.

EIB FINANCING OUTSIDE THE EUROPEAN UNION

€2.0 billion
Sub-Saharan Africa

€1.5 billion
Southern
Neighbourhood

€1.3 billion
Asia

€1.2 billion
Latin America &
Caribbean

€894 million
Eastern Neighbourhood

€677 million
Western Balkans
and Türkiye

€483 million
Other outside EU

€266 million
Ukraine
- support for Ukraine since
the start of the war
(disbursements) **€2.2 billion**

THE EIB PROCUREMENT MODEL

A DUAL APPROACH



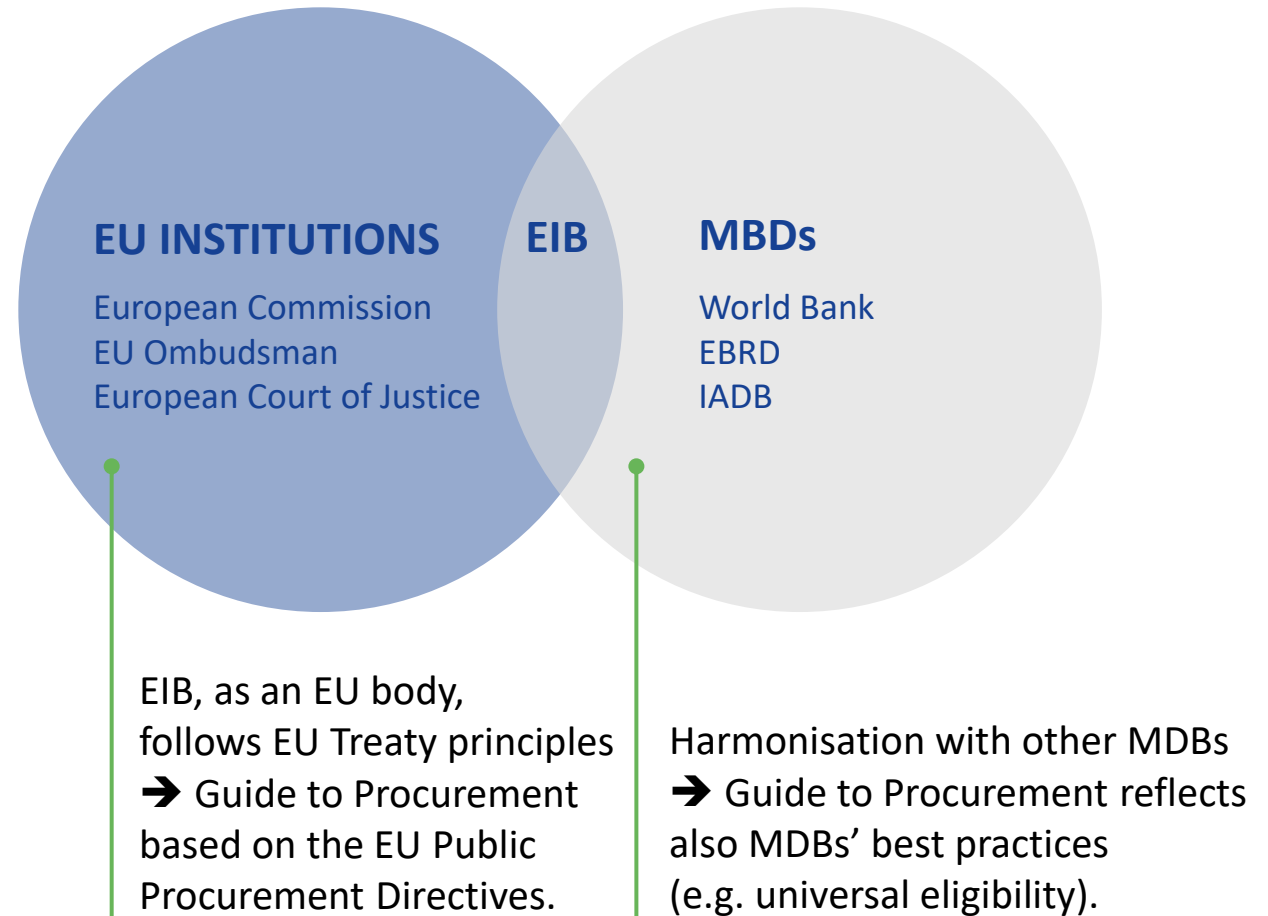
WITHIN EU

EU LAW
Solid EU MS control systems
→ Limited EIB monitoring

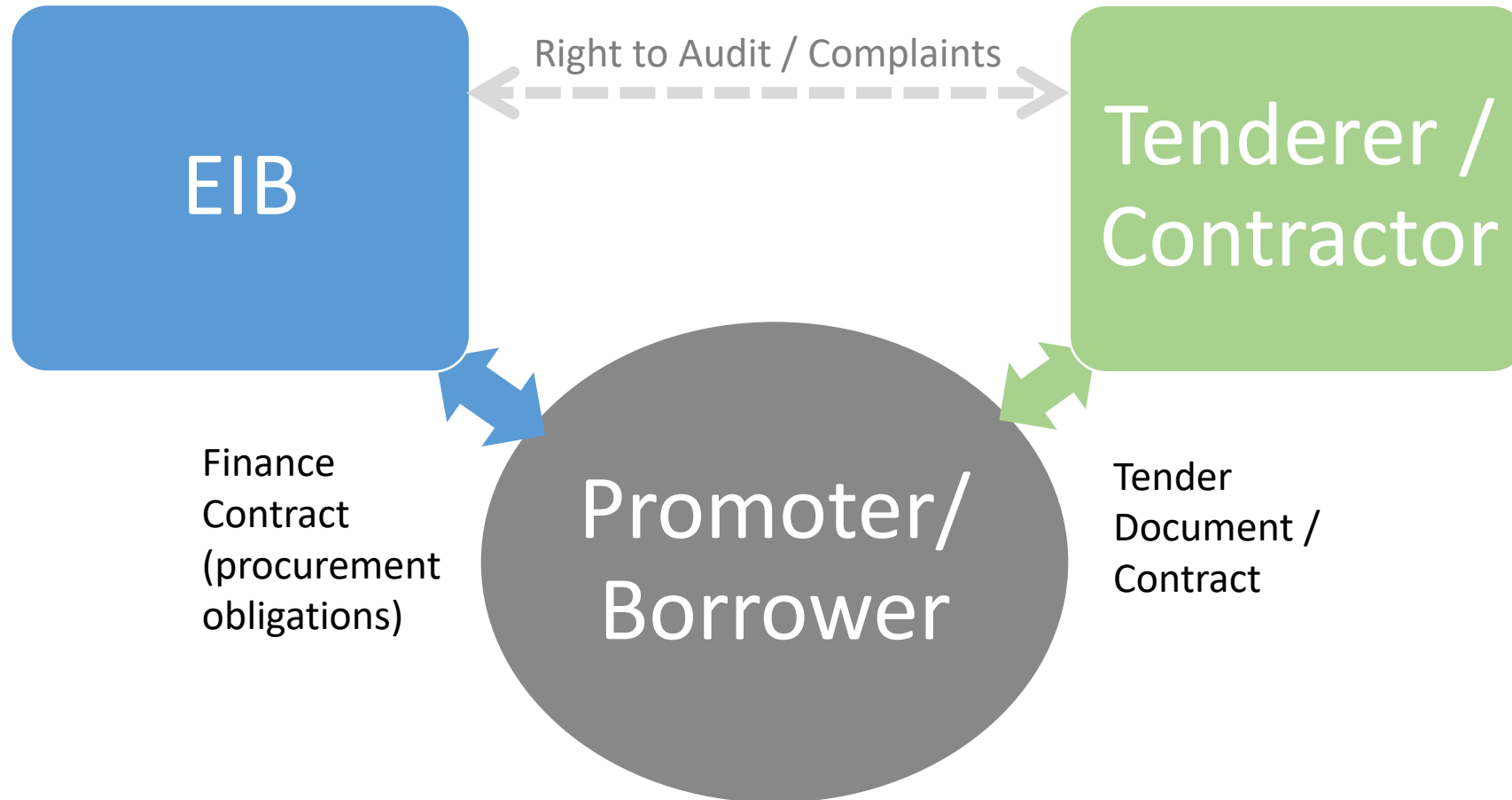


OUTSIDE EU

EIB GUIDE TO PROCUREMENT
→ Close EIB monitoring



LEGAL RELATIONSHIP BETWEEN PARTIES



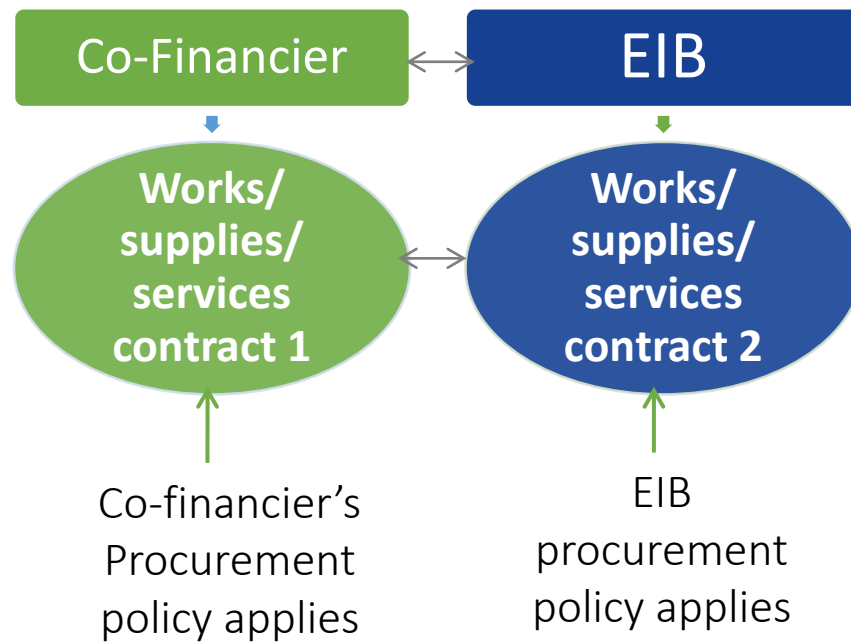
CO-FINANCING OUTSIDE EU: JOINT OR PARALLEL?

Sources of financing:

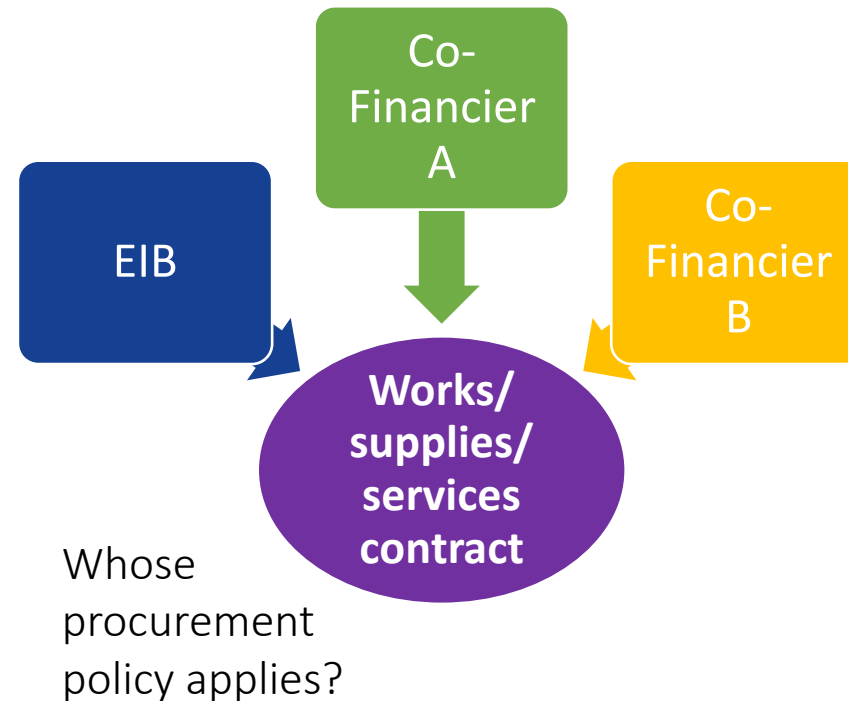
EIB + ...

- Multilateral Development Banks (MDBs)
- EU
- Bilateral Agencies
- Private Donors
- Commercial Banks / Governments

Parallel Financing



Joint Financing



MUTUAL RELIANCE WITH OTHER FINANCIERS OUTSIDE EU

EIB accepts to rely on a co-financier's procurement policy provided that:

A. Universal Eligibility

at least EU Member States and the beneficiary country.

B. Adequate publicity

Wide international competition.

C. Internationally accepted practices:

- Non discrimination of tenderers;
- Fairness and transparency of the process; and
- Contract award to most economically advantageous offer.

+ Covenant of Integrity: preserve EIB's right to inspect

E.g.: Procedural Frameworks with EBRD, AfDB, CDB, ADB, IADB, CEB, IFAD and WB

Mutual Reliance Initiative with KfW & AFD.

GLOBAL CHANGES IMPACTING PROCUREMENT

UNDER PRESSURE: RISING INTERNATIONAL TRADE TENSIONS



CONSULTATIONS OVER THE LAST 2 YEARS

- EC, MDBs, EU industry representatives
- Joint MDB work on sustainable procurement
- **Consistent international position outside EU**
- **Balance international cooperation & promotion of EU standards / best practices**
- **Remain ahead of the curve and lead the way for the MDBs**



01

ELIGIBILITY RESTRICTIONS

Radical & not always realistic solution to eliminate 3rd country tenderers

02

STRATEGIC PROCUREMENT

- **MDBs, industry representatives converge towards this**
- **Key topic of discussions EIB-EC-EU industry**

DECEMBER 2024

The EIB Strategic Procurement Roadmap approved by the Management Committee

MOVING TOWARDS STRATEGIC PROCUREMENT

STRATEGIC PROCUREMENT

TRADITIONAL PROCUREMENT

ECONOMY

EFFICIENCY

OPEN COMPETITION

SUSTAINABLE PROCUREMENT
(ENVIRONMENT, SOCIAL, CIRCULAR, GENDER ETC.)

BETTER PROJECT DELIVERY
(MATURITY, QUALITY, DIGITAL TOOLS →
SPEED OF DISBURSEMENT)

BROADER POLICY OBJECTIVES
(TRADE, SECURITY, CYBER SECURITY)

WORKSTREAMS

01

REVISION OF
POLICY &
PROCEDURES

02

PROCUREMENT
PORTAL FOR
PROJECTS

03

MARKET
OUTREACH

04

TECHNICAL
ASSISTANCE
FOR ADVISORY

05

IMPACT
ASSESSMENT &
REPORTING

EIB'S PUBLIC SECTOR PORTFOLIO OUTSIDE EU MAPPED INTO THREE CATEGORIES

EIB's Environmental & social Standards

Ensure application of EIB's applicable environmental & social standards

Encourage Selected Strategic Tools

Encourage sustainability requirements in procurement where possible

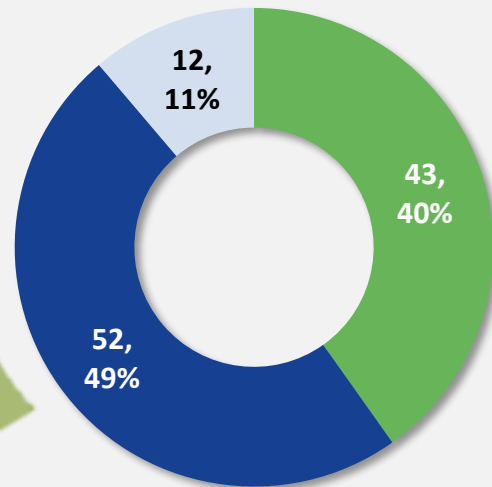
Integrated Strategic Procurement

Early engagement to design a custom-made procurement strategy
Need for early Technical Assistance
Promoter's interest and willingness

Survey: KEY BARRIERS FOR EU COMPANIES COMPETING IN NON-EU MARKETS

Survey received 107 responses in total.

RESPONDENTS' COMPANY PROFILE

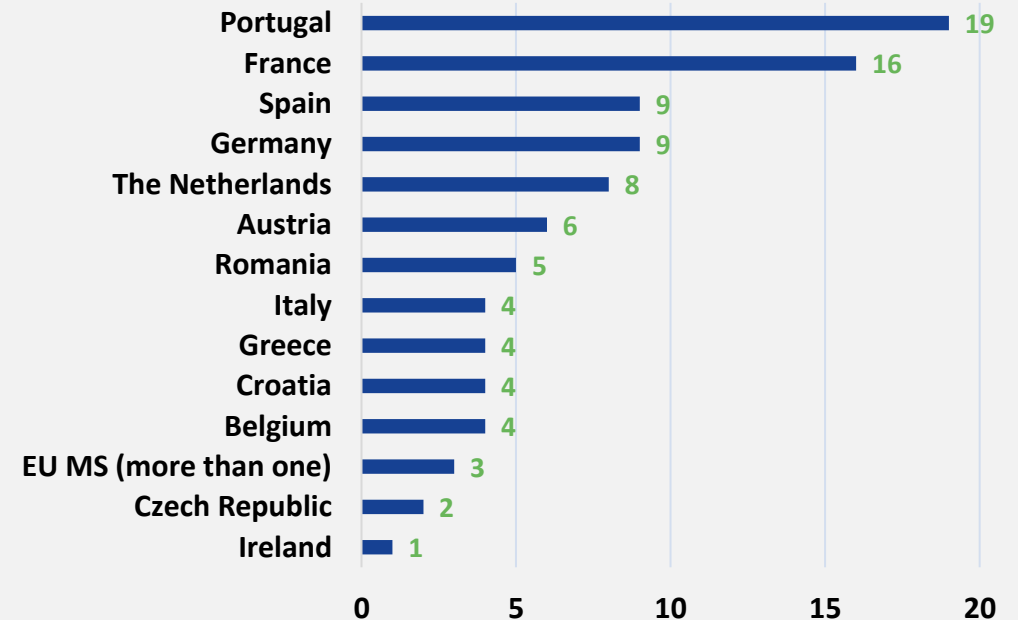


■ Works ■ Consultancy services ■ Supply of Goods

Most respondents work in the following sectors:

- transport (18%),
- renewable energy and energy efficiency (13%),
- water and sewerage (12%),
- urban development (11%).

COUNTRY OF RESPONDENTS' ESTABLISHMENT



Most responses were submitted by companies from Portugal (18%), followed by France (15%), Germany and Spain equally (8%). Besides the companies from EU member states, 10 responses (9%) were submitted by companies established outside the EU.

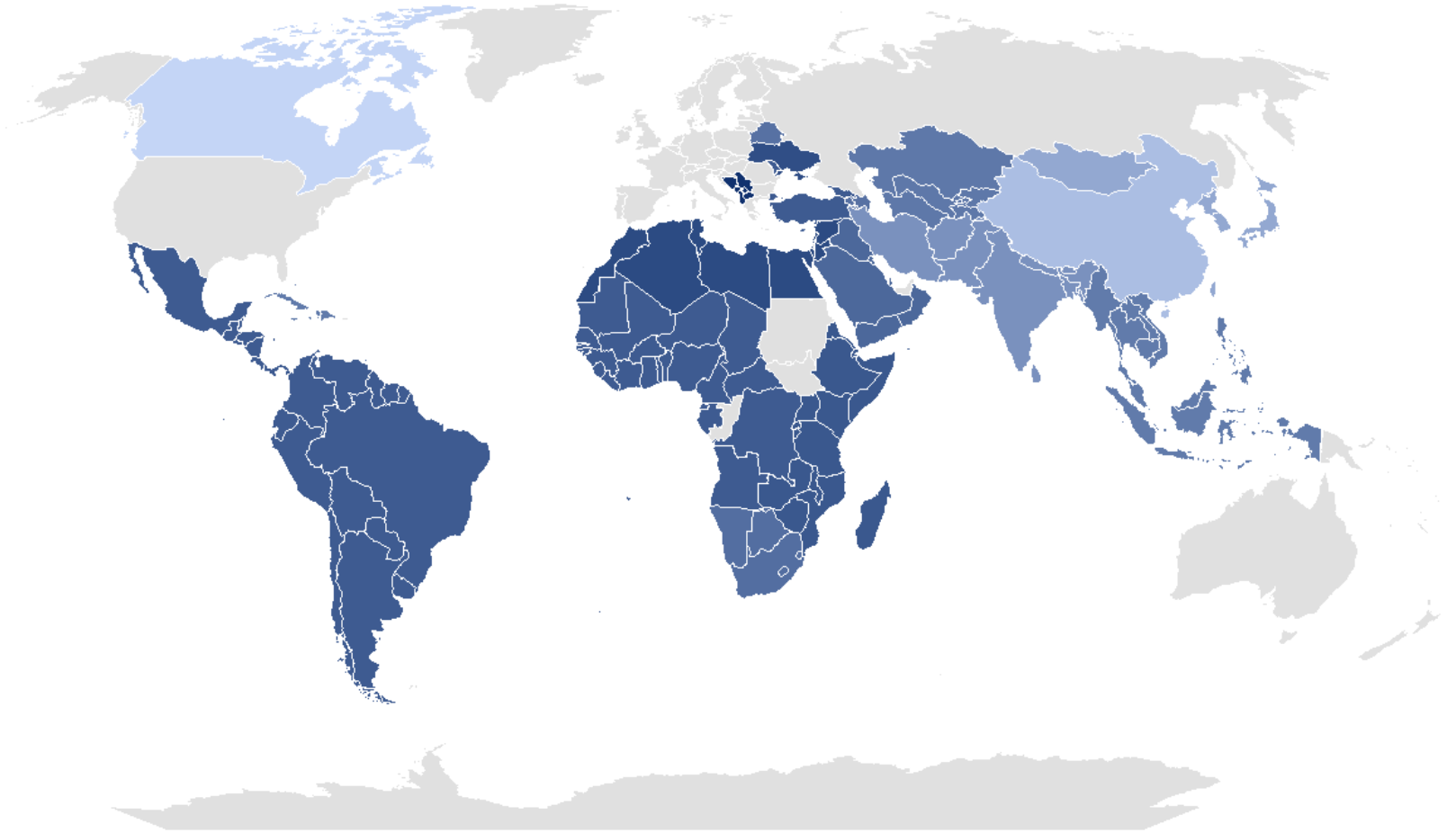
The results of this survey do not represent the official position of the Bank. They merely reflect the perceptions and opinions of individuals who anonymously completed the open survey.

INTEREST IN NON-EU MARKET

85%

indicated an interest
in competing for
procurement
contracts outside the
European Union.

The geographical areas of respondents' biggest interest are quite evenly distributed among countries with EIB presence, with a slight preference for **Western Balkan countries** (52 responses), followed by **EU Southern Neighbourhood** countries (44 responses), and **Ukraine** (39 responses).



REASONS FOR NOT PARTICIPATING / NOT WINNING CONTRACTS OUTSIDE THE EU

When identifying reasons for not participating in or winning procurement contracts outside the EU, **lowest price wins** and **restrictive tender requirements** were identified as the most significant. These were followed by **complex tender requirements**, **quality not adequately weighed**, **high competition**, and **lack of timely information about opportunities**.

Conversely, **not able to find a local partner** and **EU companies not eligible to participate** were regarded as less significant factors for EU companies not participating in or winning procurement contracts.

ORDER OF SIGNIFICANCE



COUNTRY LEVEL BARRIERS

The respondents' perception

A substantial total of 52% of respondents perceived the **high level of corruption** as a primary deterrent to participate in tendering for contracts outside the EU. This was followed by **concerns about security** (33%) and **payment currency** exposing EU companies to currency exchange risks (19%).

Economic uncertainty, political instability, and excessive regulatory burden along with a **complex regulatory environment** were perceived as the four most significant barriers that still allowed EU companies to compete for certain contracts outside the EU.

Conversely, **cultural differences, language barriers, and mandatory technology transfers** were not considered barriers to participating in tendering processes outside the EU by a significant number of respondents.

DETECTING BARRIER

52% high level of corruption

33% no security

19% payment currency

SIGNIFICANT BARRIER

56% economic uncertainty

54% political instability

42% excessive regulatory burden & complex regulatory environment

NOT A BARRIER

49% cultural differences

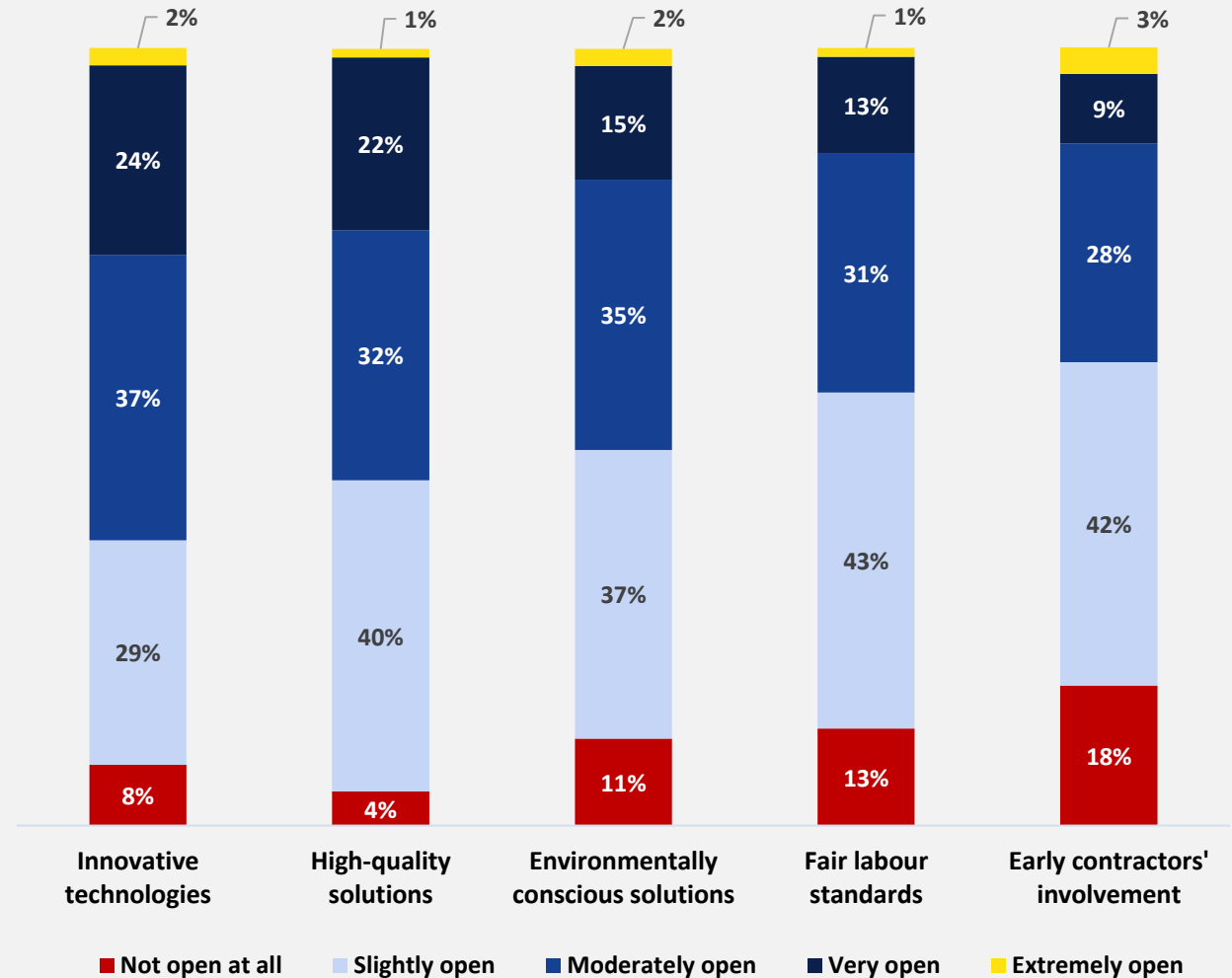
48% language barriers

37% forced technology know-how transfer

OPENNESS OF NON-EU MARKET TO HIGHER STANDARDS

More than 80% of respondents perceive non-EU markets as **open** to a certain extent to **innovative technologies**, and **high-quality solutions**.

Early contractors' involvement (18%), the **application of fair labour standards** (13%), and **environmentally conscious solutions** (11%) are perceived as the **biggest categories** to which non-EU markets are not open at all.



CONCERNS RELATED TO UKRAINE

01 INSURANCE

Many respondents underscored the **heightened cost of insurance** and the **difficulty in finding insurance providers** willing to cover international staff and equipment delivery to Ukraine. This issue has emerged as a significant barrier to participation in public tenders.

02 SECURITY CONCERNS

Security risks for staff have been a major concern impacting participation. The ongoing conflict has made it challenging to mobilize international experts, with many unwilling to travel to Ukraine due to safety considerations. This has hindered the ability to deploy personnel and carry out projects on-site.

03 CHALLENGES IN PARTICIPATION

The wartime conditions have led to a **decrease in public tenders** and difficulties in participating in those that are available. Issues such as **disrupted site visits, damaged infrastructure, travel restrictions, and delayed payments** have further impeded participation.

04 FINANCIAL & OPERATIONAL COSTS

Additional financial and operational burdens due to **hiring security services, using armoured vehicles, implementing emergency evacuation plans, and integrating insurance costs** into tenders have reduced the competitiveness of EU [responsible] companies.

EIB procurement platform

<https://www.eib.org/en/about/procurement/project-procurement>

[Project procurement](#)



The Guide to Procurement outlines the EIB's project procurement policy. Its purpose is to inform borrowers and project promoters whose contracts are financed by the EIB of the arrangements for procuring works, goods and services required for their projects.

Borrowers and promoters are fully responsible for implementing projects financed by the Bank,



Promoter's Corner

- Templates
- Trainings online,...

Market Outreach

- Business opportunities
- Procurement strategies
- Market surveys
- Events with industry representatives

THANK YOU



European
Investment Bank