

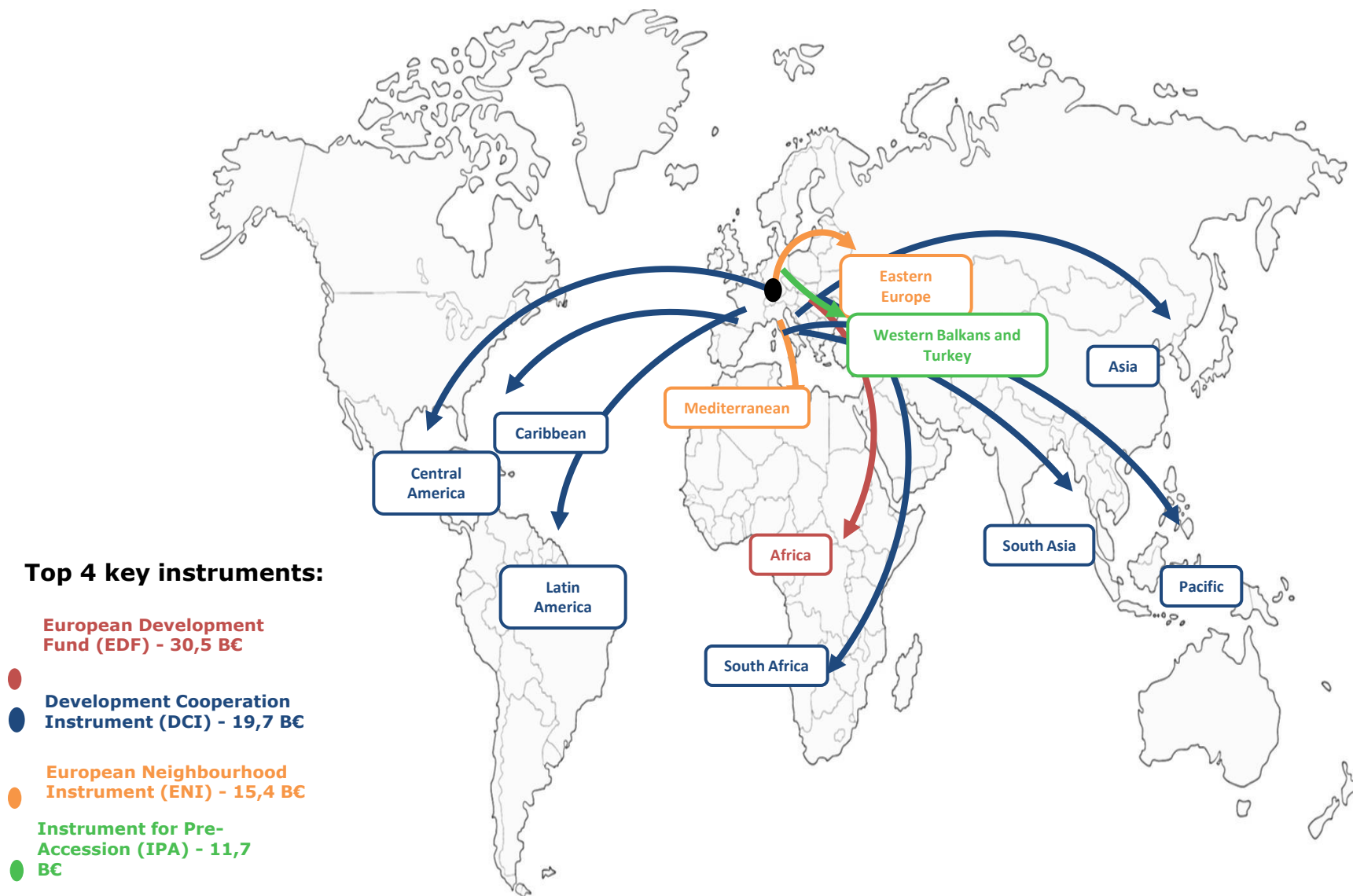
Guidelines on participation in EU External Aid Assistance Programmes

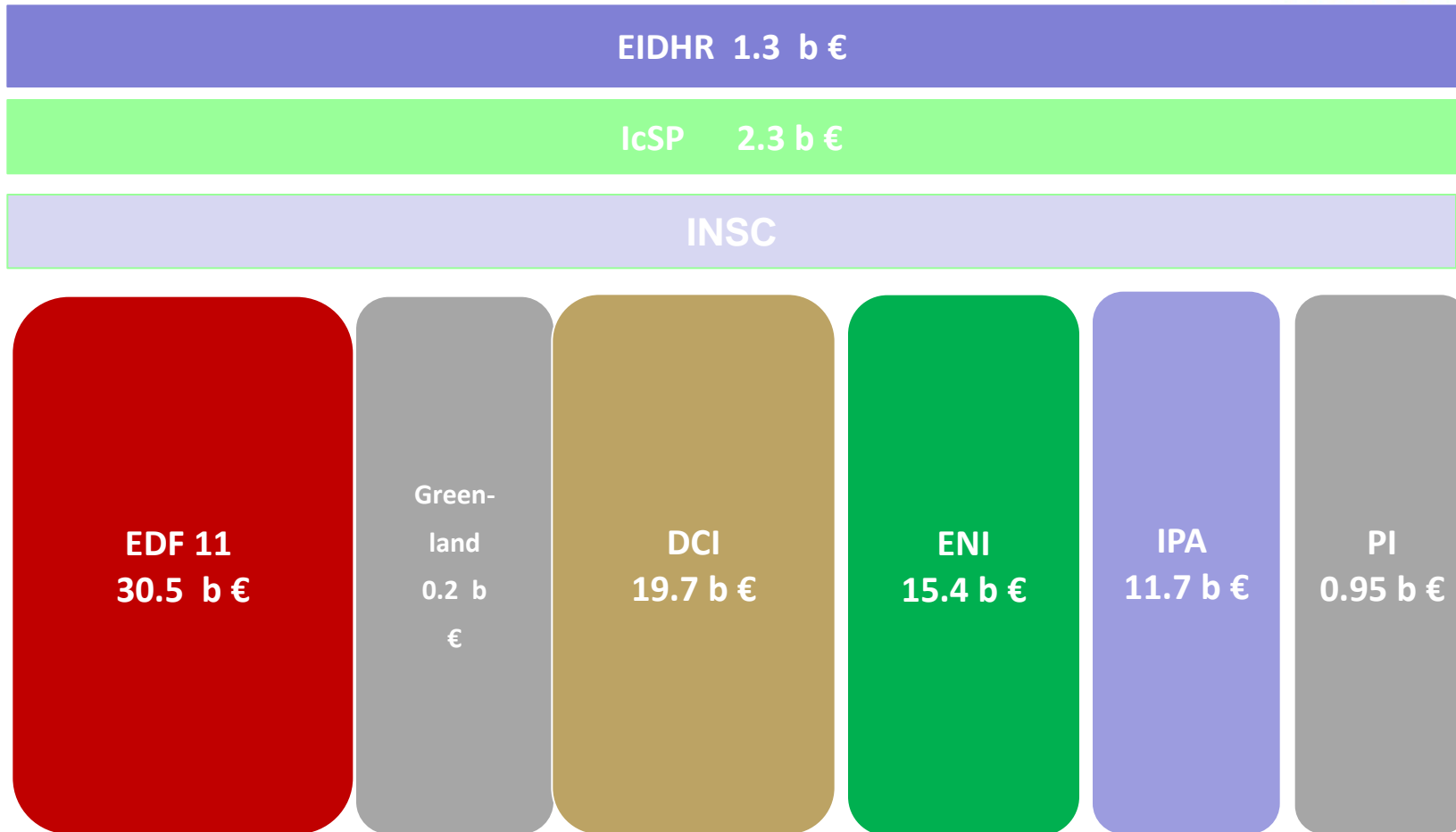


Brussels · Bucharest · Dublin · Madrid · Milan · Sofia · Athens · Warsaw

www.schumanassociates.com

- EU is the **largest donor** in the world with an overall budget for External Aid is **83 Billion EUR** for the period **2014-2020**.
- **Development policy** instruments and funding translate into concrete projects and opportunities for business.
- **Political leverage:** Policy dialogue to improve framework conditions for doing business.
- **Financial leverage:** Increased use of financial instruments, such as blending: making transformative and enabling investments possible.
- **Global presence:** EU Delegations key actors on the ground: projects, policy dialogue, dialogue with business.





LEGEND

EDF: European Development Fund
DCI: Development Cooperation Instrument
ENI: European Neighborhood Instrument

IPA: Instrument for Pre-Accession
PI: Partnership Instrument
EIDHR: European Instrument for Democracy and Human Rights

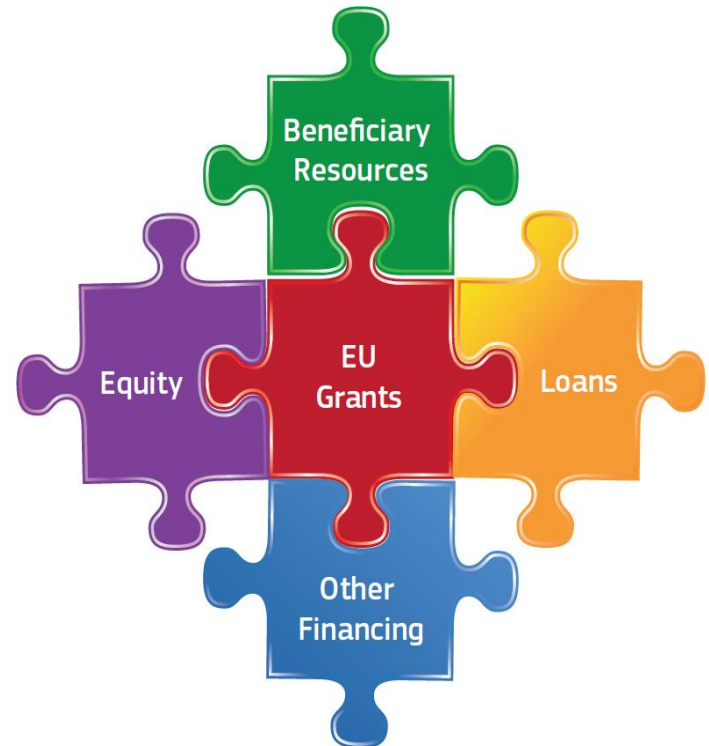
IcSP: Instrument contributing to Stability and Peace
INSC: Instrument for Nuclear Safety Cooperation

Blending is the combination of EU grants with loans or equity from public and private financiers

Instrument for achieving EU external policy objectives. Complementary to other aid modalities. Following relevant regional, national and overarching policy priorities.

EU grant can take different forms:

- ☐ **Investment grant & interest rate subsidy**
- ☐ **Technical assistance**
- ☐ **Risk capital**
- ☐ **Guarantees**
- ☐ **Project Cycle and timing**



GEOGRAPHICAL COVERAGE OF EU BLENDING FACILITIES

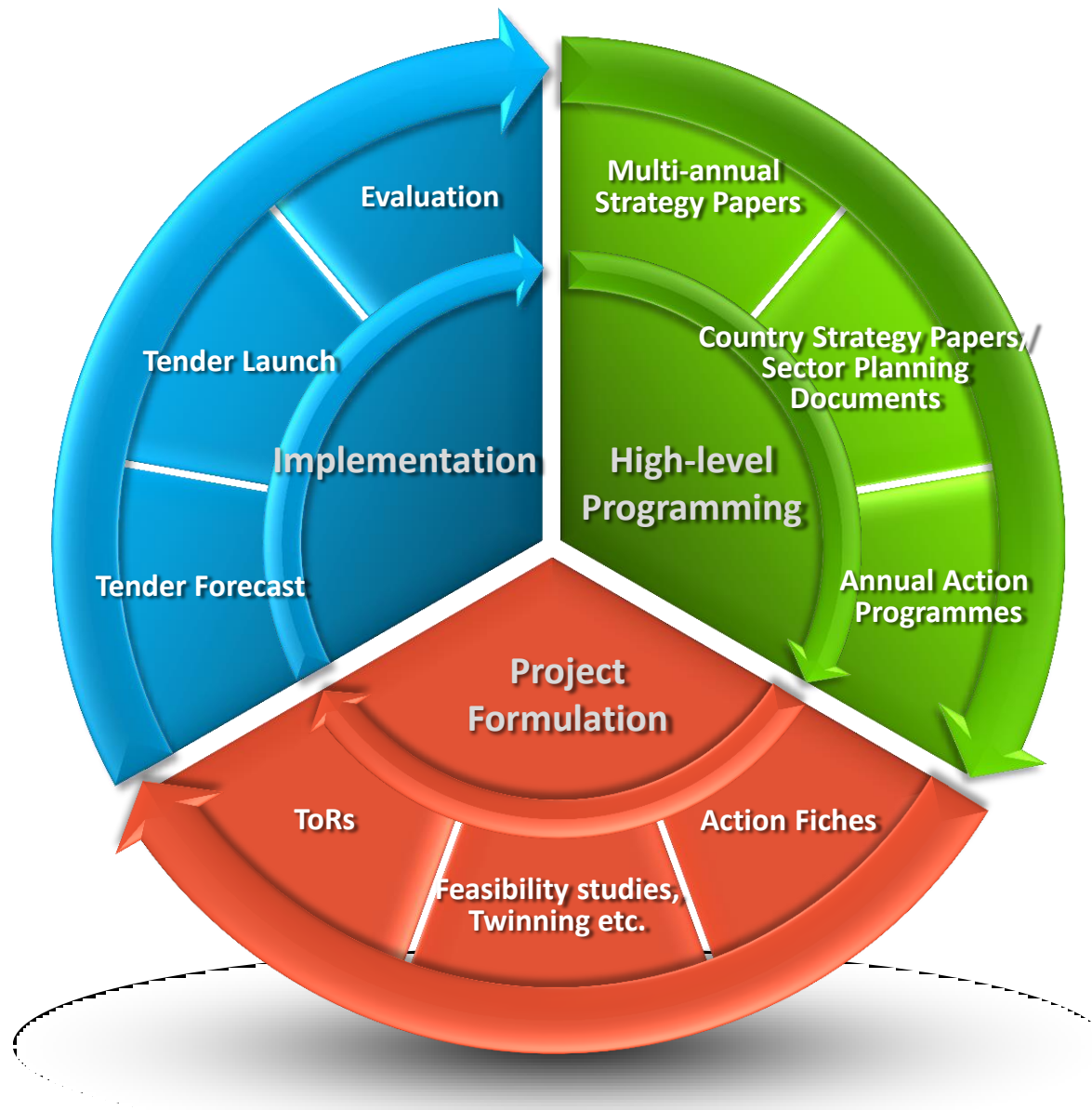


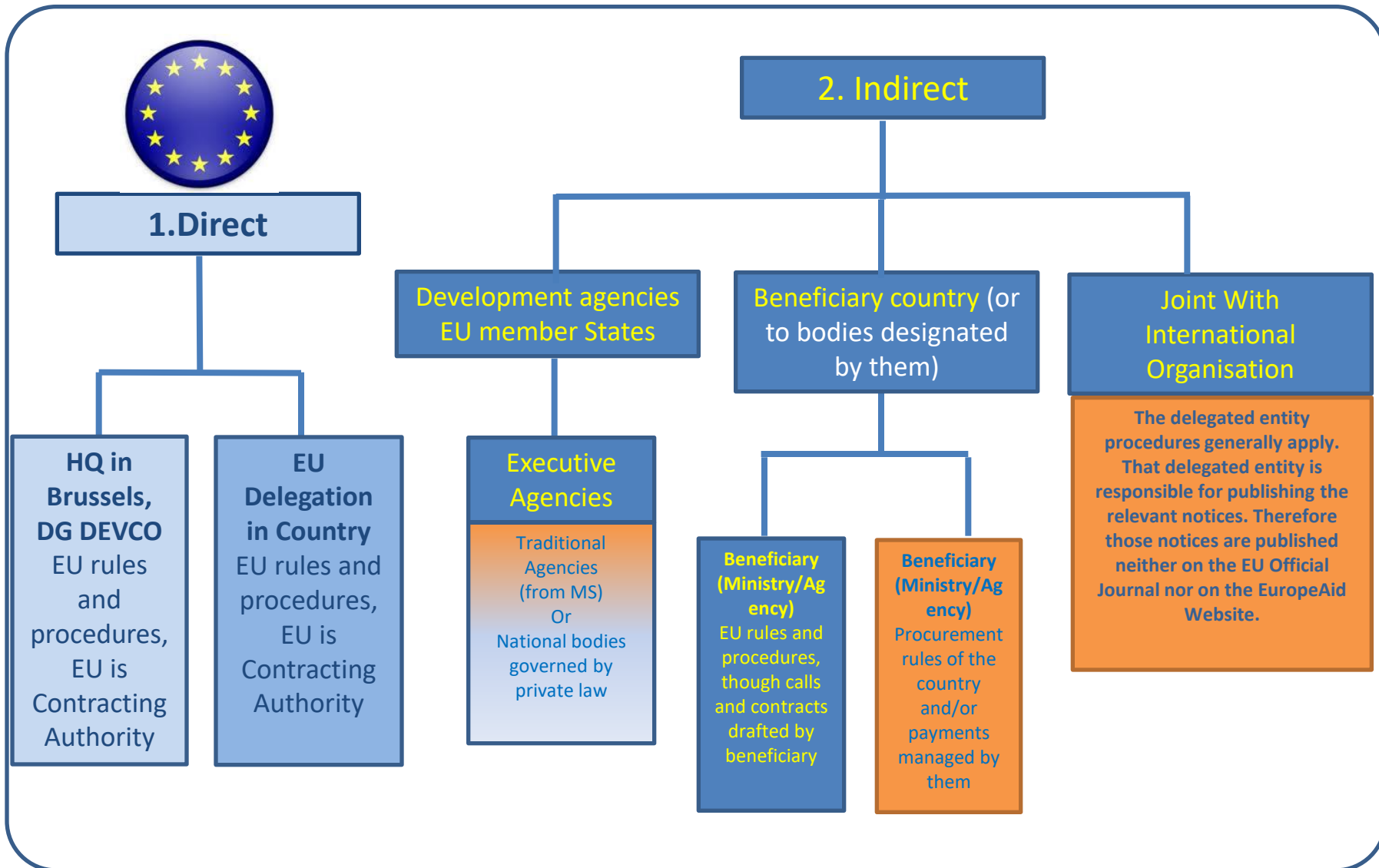
- Introduced by President Juncker in the 2016 State of the Union address
- Objective: to boost investment and sustainable growth globally
- **The EIPP gives greater role to private sector** investors in emerging markets by helping companies develop a higher number of bankable projects and make them known to the international investor community.
- The EEIP aims to:
 - encourage investments in Africa and the EU Neighbourhood with a view to contribute to the implementation of the 2030 Agenda on Sustainable Development Goals (SDGs) and the Addis Agenda on Financing for Development and
 - contribute to address the root causes of migration by reinforcing country partnerships.

FUNDING



With an input of **EUR 3.35 billion** from the European Development Fund, the EEIP will support innovative guarantees and similar instruments in support of private investment, enabling it to mobilise up to **EUR 44 billion** of investments. If Member States and other partners match the EU's contribution, the total amount could reach **EUR 88 billion**.





What is the PRAG?

- ***Practical Guide to contract procedures for European Union external actions***

- It explains the contracting procedures applying to all EU external actions financed by the EU budget and the European Development Fund (EDF).

Where do I find the PRAG?

- **Public document**, available at: <http://ec.europa.eu/europeaid/prag>

Financial Regulation (consolidated version)

<http://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1426581393503&uri=CELEX:02012R0966-20140618>

Where to find:

- the pre-information notices
- the procurement notices
- tender dossiers
- award notices

Project opportunities can be found at: <https://webgate.ec.europa.eu/europeaid/online-services/index.cfm?do=publi.welcome&userlanguage=en>

European Commission > EuropeAid > Work with us > Funding > Calls for proposals & Procurement notices

Calls for proposals & Procurement notices

Latest Publications		Search by reference		Advanced Search	
Programme	<input type="text"/>			Geographical Zone	<input type="text" value="Select region or country"/>
Type	<input type="checkbox"/> Grants	<input type="checkbox"/> Supplies	<input type="checkbox"/> Services	<input type="checkbox"/> Works	Published After <input type="text"/>
Status	<input type="checkbox"/> Closed	<input type="checkbox"/> Open	<input type="checkbox"/> Forecast		

The Latest Publications tab can be used to search the Forecast and Open calls published during the last ten days.

The Reference Search tab can be used to search a call based on the reference of the call (i.e. 128150 for the call EuropeAid/128150/D/ACT/TR).

The Advanced Search tab can be used to search calls based on the region, the country, the program,...

[Subscribe to the RSS feed](#) and be automatically notified of new publications and updates.

Increased use of electronic means:

- publication of notices
- tender dossier
- outcome of the procedure

Main steps of procurement procedures

1. Publication
2. Shortlist*
3. Tender launch*
4. Tenders received
5. Evaluation
6. Contract Award
7. Contract Signature

*International Restricted Tender for services or works

1. Exclusion criteria

Purpose: to determine if the operator is allowed to participate. Operators will be excluded if:

- ☐ Bankruptcy, affairs administered by court, arrangement with creditors, suspension of business activities
- ☐ Convicted of an offence concerning their professional conduct
- ☐ Guilty of grave professional misconduct
- ☐ Not in compliance with social security contributions or payment of taxes
- ☐ Fraud, corruption, money laundering, involvement in a criminal organisation
- ☐ Subject to an administrative penalty by the EU Financial regulation

2. Selection criteria

Purpose: to determine if the operator has the necessary capacity to perform the contract. **3 types:**

Economic and financial capacity

Example: the tenderer's average annual turnover in the last three years must exceed the annualized maximum budget of the contract

Professional capacity

Examples: - number of permanent staff or in a concrete field in last 3 years

Technical capacity

Example: "x" implemented projects in the last 3 years (5 for works) of at least a certain amount and in related fields

3. Award criteria

Purpose: to determine which proposal provides offers the best price-quality ratio

Hence it both considers the technical and financial proposals.

Administrative reasons

- ☐ Late arrival
- ☐ Tender guarantee missing or not in right format
- ☐ Incomplete documentation
- ☐ Not in accordance with templates
- ☐ Tenderer/applicant/member of consortium/sub-contractor not eligible
- ☐ Bid not signed
- ☐ Bid not in the currency/language required
- ☐ Selection criteria not fulfilled
- ☐ Financial offer not in a separate envelope or visible in the technical offer (service contracts)

1. Define your strategy

- Will you be a sole tenderer / (lead) member of a consortium / sub-contractor ?

2. Use the clarification period to:

- ask whatever is not clear in the tender dossier / guidelines for applicants

3. Pay attention to all the instructions in the Call for tenders / Call for proposals, and in particular to:

- Terms of reference (services)
- Technical specifications (supplies)
- Bill of quantities (works)
- Guidelines (grants)

4. Check carefully:

- Eligibility: nationality (members in a consortium, sub-contractors)
- Origin of goods (for supplies and works)
- Selection criteria on Contract notice
- Evaluation Grids (services), check lists (grants)
- Respect of formal submission requirements



Main Office: Brussels

Rue Archimède 5, bte 12 B-1000 Brussels (Belgium)

VAT BE0438 937 371

T +32 (0) 2 2307439 E info@schumanassociates.com

Bucharest (Romania)

anca@schumanassociates.com

Madrid (Spain)

irati@schumanassociates.com

Sofia (Bulgaria)

tanya@schumanassociates.com

Dublin (Ireland)

info@schumanassociates.com

Milan (Italy)

danai@schumanassociates.com

Athens (Greece)

laura@schumanassociates.com

SCHUMAN ASSOCIATES is a Brussels-based, independent, consultancy with more than 25 years' experience in European funding and public affairs.



EU & IFI FUNDING



H2020 & GRANTS



ADVOCACY & PUBLIC AFFAIRS



CORPORATE COMMUNICATIONS



ASSOCIATION MANAGEMENT



TAILORED TRAININGS

