

**Subject: Multiple Framework Agreement.  
A strategic way forward: transformational  
organisation, project and change management**

**Terms of reference of  
Multiple Framework Agreement  
A strategic way forward: transformational organisation, project and change management (“FWA  
Terms of Reference”)**

Contracting Authority	The European Investment Bank hereinafter referred to as “the EIB” or “the Bank”.
Purpose	The EIB aims at establishing a multiple Framework Agreements with specialised service providers to support the activities relating to transformational change in organisation, project and change management within the EIB Operations Directorate.
Lots	This call for tenders is divided into 2 (two) distinct lots:  Lot 1: Strategic transformational change Lot 2: Project and change management
Estimated maximum total value	Lot 1: up to EUR 4 000 000 (four million euros) Lot 2: up to EUR 2 000 000 (two million euros)
Framework agreements	<b>Lot 1:</b> the EIB will sign a multiple Framework Agreement with <b>5 (five) service providers</b> , provided that a sufficient number of admissible tenders have been received.  <b>Lot 2:</b> the EIB will sign a multiple Framework Agreement with <b>5 (five) service providers</b> , provided that a sufficient number of admissible tenders have been received.  For the execution of these multiple Framework Agreements, a <b>parallel award mechanism</b> , as described in Section 4, will apply.
Submission of Offers	Tenderers may submit an offer for one or more Lots, but not for a part of a lot. Tenders will be evaluated separately for each lot.
Duration of each multiple Framework Agreement	4 years
Estimated start dates of the Framework Agreements	Second quarter 2019
Main places of delivery	Premises of the service provider. On site at EIB premises in Luxembourg.
Variants	Not permitted
Procedure	Open procedure with publication in the OJEU
Joint offers	Permitted
Subcontracting	Permitted

**DEFINITIONS**

Please refer to Article 1 of the Framework Agreement (Annex 5)

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## **1. Background information**

### **1.1 General Information and objectives**

The EIB is the European Union's long-term financing institution. As the world's largest multilateral lender, it particularly focuses on the added value it can bring to the projects in which it finances (for further information please visit [www.eib.org](http://www.eib.org)).

The objective of this Call for Tenders is to request services to support the activities relating to the transformational change in organisation, project and change management for various departments within the EIB Operations Directorate, which is responsible for the Bank's financing operations.

This Call for Tenders is divided into the following 2 (two) distinct lots:

- Lot 1: Strategic transformational change - up to EUR 4 000 000 (four million euros).
- Lot 2: Project and change management - up to EUR 2 000 000 (two million euros).

### **1.2 Services required**

For each of the Lots a multiple Framework Agreement shall be signed (Annex 5). The detailed description of each Lot is specified in Appendix I of this Framework Agreement Terms of Reference.

Under each Lot, an Assignment may cover one or several points of the technical description, as defined in Appendix I of this Framework Agreement Terms of Reference. All communication and reports shall be conducted in English.

The services shall be provided on premises of the Service Provider or at any of the Bank's premises in Luxembourg City.

Any time after signature of the Framework Agreement and during the Framework Agreement implementation, the EIB may organise meetings inviting each selected Service provider (as defined in the Framework Agreement) to report on progress and to analyse the functioning of the Framework Agreement.

In these circumstances, the travel and accommodation costs for the Service Providers to attend these meetings will not be reimbursed by the EIB.

## **2. Framework Agreement coordination – for each lot**

### **2.1 EIB Contact Person**

Upon Framework Agreement signature, the EIB will appoint a member of its staff (EIB Contact Person) within the Operations Directorate in charge of the Framework Agreement overall management.

Upon signature of each Contract implementing the Agreement, the EIB will appoint an Assignment Manager whose role will be to oversee the implementation of the Assignment and to liaise with the Service Provider in that respect.

### **2.2 FWA Management Team - for each lot**

#### **2.2.1 Composition and tasks - for each lot**

The Service Provider FWA Management Team shall comprise:

- **1 (one) Framework Manager.** He/she has the overall responsibility for the implementation of the Agreement and the formal contacts with the EIB. He/she will be the point of contact for all Assignments. He/she is required to react within 2 (two) Business Days to any written communication made by the EIB.

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The Framework Manager must have the following mandatory minimum skills and qualifications:

- ✓ At least Master's Degree (Level 7 in the European Qualifications Framework (EQF<sup>1</sup>) or equivalent),
  - ✓ At least 5 (five) years of professional experience in managing contracts for international financial institutions
  - ✓ At least 5 (five) years of professional experience in a coordinating role in an international environment,
  - ✓ Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7).
- **1 (one) Technical Director.** He/she has the overall responsibility for technical oversight and coordination of the Framework Agreement implementation and for providing high-level guidance to the sectoral experts assigned to Contracts. He/she signs off all outputs required under the Assignments and all reports on the Framework Agreement implementation. He/she maintains the final responsibility for the quality control of the work carried out at the level of the Assignments.

The Technical Director must have the following mandatory minimum skills and qualifications:

- ✓ At least Master's Degree (Level 7 in the European Qualifications Framework (EQF) or equivalent),
- ✓ At least 10 (ten) years of international project management experience, involving teams of several experts,
- ✓ At least 10 (ten) years of professional experience in delivery and quality control of consultancy services to international financial institutions
- ✓ Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7).

**The Framework Manager or the Technical Director may act as an expert for an Assignment.** However only one of the two may be dedicated to a specific Assignment at any given time and coverage for the Framework Manager and Technical Director positions must be maintained as outlined above.

### **2.2.2 Back-up**

At least one member of the FWA Management Team shall be available to formally take over the tasks of the other each time the other FWA Management Team member is temporarily absent. Any change to the composition of the FWA Management Team must be previously approved by the EIB in writing.

### **2.3 Facilities to be provided by the Service Provider**

All secretarial and other office-related costs (which may include office rental, communications such as fax, telecommunications, mail, courier etc., and report production) are included in the experts' fee rates. No costs of this nature may be charged in addition.

## **3. Categories of experts to be proposed for the performance of specific assignments for each lot**

### **3.1 Categories**

There are 4 (four) categories of experts that will be required for the Assignments implementation. In case of doubt on the professional profile received (see template in Annex 7), the EIB may require evidence of the

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<sup>1</sup> <http://www.cedefop.europa.eu/en/events-and-projects/projects/european-qualifications-framework-eqf>

below skills. If during the implementation of a Contract, the EIB considers the expert(s) unable to meet the level of quality required for preparing the written outputs such as reports, the Service Provider will provide, at no additional cost to the EIB, immediate additional support for these outputs to meet the appropriate standards. Should the EIB require the replacement of an expert for reasons such as consistent failure to meet the requirements of the Terms of Reference of an Assignment, the Service Provider will take the necessary steps to propose a replacement solution to the EIB at the shortest term possible.

**All experts must have:**

- At least a Master's Degree (Level 7 in the European Qualifications Framework (EQF) or equivalent),
- Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7).

The tenderer shall propose a pool of key experts in a certain field of activity (Key Experts). The Bank expects that these Key Experts will be included in the technical proposals when competition is re-opened for awarding an Assignment under the Framework Agreement.

**3.1.1 General professional experience for each category**

<b>Category</b>	<b>Minimum years' general professional experience (after obtaining the academic degree) in field of expertise related to each Lot</b>
Category I	8
Category II	5
Category III	3
Category IV	1

**3.2 Assignment Terms of Reference**

The Assignment Terms of Reference will further define the required education, field of expertise, type and duration of the equivalent experience (equivalent experience which must be equal to or above the general professional experience duration fixed above); if required, other skills will be specified in the Assignment Terms of Reference, notably specific professional experience. See also section 4.2.

As regards required expert profile, the Assignment Terms of Reference may not impose more years of general professional experience, nor impose a number of years of specific experience, which exceeds the years of general professional experience defined for each category.

The Assignment Terms of Reference may indicate either the profile/skills per expert or the expertise required from a team, in which case the Service Provider is responsible for proposing a team covering all the expertise required.

**4. Procedure for awarding specific assignments under each lots**

**4.1 Assessment of the Proposals**

The EIB will assess the Proposals according to the best price-quality ratio method using a weighting which will be specified in the Assignment Terms of Reference. The weightings applied by the Bank for such awards shall range from 60% to 80% for Quality and from 20% to 40% for Price, under the Bank's sole discretion. The choice of the specific range can be impacted by urgency, overall circumstances or the complexity level of the

Services to be provided. For the procedure for awarding specific assignments, please refer to Article 4 of the draft Framework Agreement.

#### **4.2 Assignment Terms of Reference**

Please refer to Article 4 – PROCEDURE FOR AWARDING SPECIFIC ASSIGNMENTS of the draft Framework Agreement. Please note that only the successful Tenderer must at the assignment stage fill the document “Background checks” listed in Appendix II in with the full name and business title of the Service Provider consultant who will need to access the Bank’s premises for the provision of services and submit to EIB.

#### **4.3 The Proposals**

Please refer to Article 4 – PROCEDURE FOR AWARDING SPECIFIC ASSIGNMENTS of the draft Framework Agreement.

#### **4.4 Clarifications**

Points of clarification may be addressed as mentioned in article 4.2 of the draft Framework Agreement.

### **5. Remuneration**

#### **5.1 Overheads and expenses**

All overheads and expenses, including the cost of the FWA Management Team and costs such as quality control, backstopping mechanism, translation support if applicable, logistic and administrative support, are considered as integrated in the proposed expert fee rates.

Should the participation of a FWA Management Team member in the briefing/debriefing session of a particular Contract be requested in the related Assignment Terms of Reference, he/she would not be remunerated (his/her remuneration being part of the experts' fees).

#### **5.2 For all Lots: services to be provided on all-inclusive daily rate or all-inclusive lump sum**

Depending on the nature of the Assignment, the Bank has the right apply either all-inclusive daily rate or all-inclusive lump sum. Therefore the Service Provider shall be paid all-inclusive lump sum based on the rates set out in the Offer and/or at the rates set out in the Offer and in accordance with the cost breakdown contained in its Proposal.

Such rates shall include also any additional expenses to be borne by the Service Provider to enable its staff member to perform the services requested in the Assignment ToR, including travel and accommodation costs, should business trips to EIB premises in Luxembourg be deemed necessary to the performance the Assignment.

Prices shall be expressed in euro and shall be exclusive of VAT for Services provided within the European Union (the Bank is exempt from having to pay value-added tax pursuant to Article 21 of the Protocol on Privilege and Immunities).

### **6. Tenderer’s profile**

#### **6.1 Tenderer Profile**

Applicants may consider submitting a tender as a single entity or may decide to collaborate with other service providers to present a tender: either as a group or with subcontractors, or a combination of both.

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While it is not required that applicants have a specific legal form in order to submit a tender, their group composition and proposed legal form (if successful) should be clearly set out in the tender (Please refer to the General Administrative and Submission Clauses in the tender documents.).

The Bank will require that the tenderer replaces a member/subcontractor which does not meet a relevant selection criterion, or in respect of which there are grounds for exclusion. Any proposed replacement will be assessed under the same conditions.

## **6.2 Groups**

A group is where a tender is submitted by a group of economic operators (natural or legal persons). In order to ensure a satisfactory performance of the service contract, tenderers must indicate in their tenders:

- the group member who will act as a single point of contact for the Client and who will have all the powers needed to execute and perform the service contract (the “**Joint Representative**”), and
- the proposed legal form for the eventual execution of the service contract.

The above information will be reflected in the tenderer’s Letter of application (Please refer to the General Administrative and Submission Clauses in tender documents).

The tender shall provide a clear description of the proposed group organisation and structure, clearly identifying the subcontracting parties and state the roles, activities and responsibilities of the partner(s) in the group and/or of the proposed subcontractor(s).

Subject to the provisions of this Framework Agreement Terms of Reference, the Bank shall make payments to the contractual counterpart only, and against invoices submitted by the contractual counterpart only.

It is expressly prohibited for any legal or natural person to simultaneously apply within different groups, or within one group and as subcontractor of other group(s). However, subcontractors may participate in different groups as subcontractors unless there is a risk of influencing competition and/or confidentiality between the tenderers.

Further, undertakings linked by a relationship of control or of association may participate in different tenders unless there is a risk that their tenders are not drawn up completely independently and therefore a risk of influencing the competition between the tenderers. The Bank reserves the right to require appropriate evidence that such risks do not exist.

Should the composition of the grouping change at any point during the tendering process, the offer will be rejected.

Furthermore, shall the composition of the grouping proposed change any time after the Framework Agreement award and signature, the EIB has the right to terminate the Framework Agreement.

## **6.3 Subcontracting**

Where the tenderer intends to subcontract some of the services to another legal entity, the tender must set out in the Subcontractor’s Letter of Undertaking (Please refer to the General Administrative and Submission Clauses in the tender documents) the share of the Agreement which the tenderer intends to subcontract and the identity of such subcontractors, as well as a letter of intent by each subcontractor stating its intention to collaborate with the tenderer, if the tenderer is awarded the Framework Agreement.

During the Framework Agreement execution, the Service Provider will need the Bank’s express authorisation to replace a subcontractor with another and/or to subcontract tasks for which subcontracting was not foreseen in their original tender. In such cases, the new subcontractor(s) proposed by the Service Provider will be subjected to the same exclusion and selection criteria assessment as described above.

#### **6.4 Freelancing**

Freelancing, drawing on the activities or staff of any other entirely different legal entity than the Service Provider, independently of its exact legal form, the relation to the Service Provider (and independently of the applicable national law), qualifies as subcontracting.

#### **7. Assessment and Award of the Framework Agreement for each lot**

The assessment will be based on the information provided in the tender. Documentation submitted must be valid. The absence of required documents or information to be supplied by the tenderers in order to comply in all material respects with the present Call for Tenders may result in the rejection of the tender.

In the first instance, the administrative requirements as set out in General Administrative and Submission Clauses shall be reviewed, following which tenders received will be assessed against exclusion and selection criteria and rules set out in sections 7.2 – 7.3 herein.

Only tenders who have met the administrative requirements, the exclusion and selection criteria will be examined under the award criteria and rules set out in section 7.4 herein.

For all Lots: the EIB will sign multiple Framework Agreement with **5 (five)** service providers, provided that a sufficient number of admissible tenders have been received.

##### **7.1 Administrative Requirements**

Please refer to the General Administrative and Submission Clauses in the procurement documents.

##### **7.2 Exclusion criteria**

Exclusion criteria shall be assessed on a pass/fail basis and those tenders receiving one or more “fail” scores will be rejected.

The *Declaration on honour* (Annex 1) contains a list of exclusion criteria in sections I-VIII inclusive.

As part of the tender submission, the tenderer (including **each** group member and **each** subcontractor) must complete, initial and sign Annex 1 stating that they are not in one of the situations of exclusion listed therein.

The exclusion criteria shall be assessed in relation to the tenderer (including each group member and each subcontractor).

While submission of Annex 1 with the tender serves as **preliminary evidence**, the Bank reserves the right to verify, before the signature of each Framework Agreement and within a deadline specified by the Bank, whether the successful tenderers (including **each** group members, and **each** subcontractor) are in one of the situations of exclusion by requiring the supporting documents listed in Annex 1.

##### **7.3 Selection criteria**

Selection criteria shall be assessed on a pass/fail basis and those tenders receiving one or more “fail” scores will be rejected. As part of the tender submission, the tenderer (including **each** group member, and **each** subcontractor being relied upon to fulfil the selection criteria) must complete, initial and sign parts VIII-IX (inclusive) of the Declaration on honour in Annex 1 declaring that they fulfil the following selection criteria, rules and evidence required as applicable to them.

##### **7.3.1. Economic and financial capacity for each of the lots**

Pass/Fail Rule: Tenderer’s turnover must exceed (in case a Tenderer applies for more than one lot, his turnover must exceed the highest threshold indicated below<sup>2</sup>):

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<sup>2</sup> Example: If a Tenderer applies for Lot 1 and 2, his turnover must exceed EUR 500,000 (= highest threshold).

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1. Lot 1: EUR 500 000 (five hundred thousand euros) during each of the last 3 (three) financial years.
2. Lot 2: EUR 400 000 (four hundred thousand euros) during each of the last 3 (three) financial years.

Where a tenderer relies on the capacities of other entities (group members and/or subcontractors) to fulfil this criterion, the Bank will require the tenderer and those group members to be jointly liable for the execution of the Framework Agreement and any contract awarded thereunder.

For third party economic operators like subcontractors a letter of commitment in the tender shall be provided to that effect in the tender.

In such cases, the pass/fail rule may be satisfied under a consolidated assessment.

Evidence:

- a statement of overall turnover for the last 3 (three) financial years available, depending on the date on which the Tenderer created or commenced its economic activity, as far as the information on this turnover is available (by using Annex 9.2 'Economic and Financial Capacity Form').
- Copies of the Annual Accounts as stated in Annex 9.2 'Economic and Financial Capacity Form'.

The original statement of overall turnover must be approved by an independent source in accordance with the applicable legal provisions of the country of the Tenderer (or the group member, or subcontractor as the case may be).

If the turnover is not expressed in EUR in the original statement, the Bank will apply the foreign exchange reference rates published by the European Central Bank on [www.ecb.int/stats/exchange/eurofxref/html/index.en.html](http://www.ecb.int/stats/exchange/eurofxref/html/index.en.html) on the date that the verification evidence is submitted to the Bank.

### **7.3.2. Technical and professional capacity for all lots**

Pass/Fail Rule: Tenderers must demonstrate prior experience within the last 3 (three) years of delivering services of a similar nature, range, scale and complexity to the required services under each Lot for which the Tenderer is applying.

The minimum amount for each contract referring to a project completed within these 3 (three) years is EUR 100,000 (one hundred thousand euros). The minimum number of contracts required is 5 (five).

Where a Tenderer is relying on the capacity of other entities (group members and/or subcontractors) to meet this rule, such entities must:

- (i) be proposed to perform those services for which these capacities are required and
- (ii) submit a letter of commitment in the tender to that effect.

In such cases, the pass/fail rule may be satisfied under a consolidated assessment.

Evidence: 5 (five) contracts achieved in the past 3 (three) years specifying in Annex 9.1 'Project Reference Form' the value, dates and recipients of the services provided and the specific and detailed tasks performed by the tenderer relevant for each of the Lots the Tenderer is applying.

## **7.4 Award Criteria**

### **7.4.1 Award method**

The tenders will be assessed by an evaluation committee in accordance with the most economically advantageous tender price/quality ratio method based on the award criteria and weightings set out below. Tenderers must submit with their tender detailed information for assessment against each of the award criteria in order to enable the Bank to assess all tenders fully and score them appropriately.

In the case of groups or sub-contracting, assessment will be made on the basis of the tender as a whole.

For each Lot, the EIB will sign multiple Framework Agreements with **5 (five)** successful tenderers<sup>3</sup> achieving the highest overall scores (S) on the condition that the documentary evidence submitted by each successful tenderer for the exclusion is compliant.

EIB reserves the right to reject any tender that fails to comply with the technical specifications (section 7.4.2.1).

#### 7.4.2 Award criteria

Each lot will be awarded as determined by the following award criteria and the following respective weightings.

	<b>TECHNICAL AWARD CRITERIA</b>	<b>Max Score Available</b>	<b>Min Score Required</b>
1	Methodology for operating Assignments	25	12.5
2	Organisation and composition of the proposed FWA Management Team	15	3
3	Proposed pool of key experts	30	15
	<b>TOTAL TECHNICAL SCORE (Ts)</b>	<b>70</b>	<b>n/a</b>

A tender must reach the indicated minimum score for each of the quality sub-criteria. If a tender does not reach one of the below mentioned minimum scores required, it will not be evaluated with respect to the financial proposal.

	<b>FINANCIAL AWARD CRITERIA</b>	<b>Max Score Available</b>
4	Total Notional Price	30
	<b>TOTAL FINANCIAL SCORE (Fs)</b>	<b>30</b>

**The resulting, weighted, technical and financial scores are added together to rank the tenderers according to their overall score (S) i.e.  $Ts+Fs= S$**

**Where Ts is the technical score and Fs the financial score.**

##### 7.4.2.1 Technical (70 points)

For each Lot, the tender shall include a proposed technical file of a maximum of 50 (fifty) pages (excluding the CVs of the proposed Pool of Key Experts and the FWA Management Team members) and including the Methodology (as specified in section 7.4.2.1.1) and the organisation of the FWA Management team (as specified in section 7.4.2.1.2). The technical file shall be written in Arial font- size 11, 1 line spacing, normal margins.

<sup>3</sup> Provided that a sufficient number of admissible tenders have been received.

**7.4.2.1.1 Methodology for operating Assignments (25 points)**

Item	Weighting	Minimum Score Required
<b>A. Proposed methodology for tenderer's reaction to call for proposals from EIB for Assignments from receipt of Assignment Terms of Reference to submission of Proposal</b>  <i>Subject of evaluation is a description provided by the tenderer containing at least the below listed elements:</i>		
Review Assignment Terms of Reference and request for clarification (if needed)	2	1
Selection, recruitment and securing of availability of experts	4	2
Preparation and submission of Proposals, excluding quality control (see criterion C. below)	3	1.5
<b>B. Proposed methodology for implementing Assignments from initial mobilisation to closure</b>  <i>Subject of evaluation is a description provided by the tenderer containing at least the below listed elements:</i>		
Initial mobilisation	2	1
Ongoing technical backstopping of experts deployed throughout execution of Assignments	2	1
Reporting and closure of Assignments, excluding quality control	2	1
Managing replacements and absences if needed	3	1.5
<b>C. Proposed quality management system</b>  <i>Subject of evaluation is a description provided by the tenderer containing at least the below listed elements:</i>		
Proposal preparation process	2	1
Quality assurance and rectification during implementation of Assignments including reporting, quality review in periodical Framework Agreement reporting	2	1
Managing high workload (simultaneous Assignments) if needed	3	1.5
<b>TOTAL</b>	<b>25</b>	<b>12.5</b>

**7.4.2.1.2 Organisation and composition of the proposed FWA Management Team (15 points).**

Item	Weighting	Minimum Score Required
<b>A. Framework Manager proposed profile meeting the minimum requirements of: 1. At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF). 2.</b>		

<b>Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)<sup>4</sup></b> <i>Subject of evaluation is the CV of the Framework Manager provided by the tenderer:</i>		
Relevant professional experience in managing contracts for international financial institutions	4	1
Relevant professional experience in coordination of teams in an international environment	3	0
<b>B. Technical Director proposed profile meeting the minimum requirements of: 1. At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF) or equivalent. 2. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)<sup>5</sup></b> <i>Subject of evaluation is the CV of the Technical Director provided by the tenderer:</i>		
Relevant international project management experience involving teams of several experts	4	1
Relevant professional experience in delivery and quality control of consultancy services to international financial institutions	4	1
<b>TOTAL</b>	<b>15</b>	<b>3</b>

Profiles meeting the minimum requirement set at point 2.2.1 requirement will receive the minimum score as indicated in the table above. Any additional points will be given as follows:

- From 5 (five) years to 10 (ten) years: 1 point.
- More than 10 (ten) years: 3 points.

#### 7.4.2.1.2 Proposed pool of key experts (30 points)

For each lot, the tenderers shall propose a pool of key experts meeting the required number and qualifications by category indicated in section 3 and further elaborated in the Category Tables below. The assessment of the proposed pool will be based on the Professional Profile Template (Annex 7) submitted by the tenderer. For each lot the weighting of this sub-criterion is 30 points and the minimum score to be reached is 15 points.

Profiles meeting the minimum requirement set at point 2.2.1 requirement will receive the minimum score as indicated in the table above. Any additional points will be given as follows:

<sup>4</sup> Any proposed Framework Manager not meeting the minimum requirements will be not be taken into consideration.

<sup>5</sup> Any proposed Technical Director not meeting the minimum requirements will be not be taken into consideration.

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Category	Number of key experts to be proposed	Points for years of relevant professional experience (PQE) for each proposed key expert, meeting the minimum requirements of:  1. At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline.  2. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7) <sup>6</sup>	Weighting	Minimum Score Required (total for the number of key experts)	Maximum score (total for the number of key experts)
<b>I</b>	2	more than 10 (ten)	3	2	6
		equal or more 9 (nine) but less than 10 (ten)	2		
		equal or more 8 (eight) but less than 9 (nine)	1		
<b>II</b>	3	equal or more 7 (seven) but less than 8 (eight)	3	3	9
		equal or more 6 (six) but less than 7 (seven)	2		
		equal or more 5 (five) but less than 6 (six)	1		
<b>III</b>	3	equal or more 4 (four) but less than 5 (five)	3	6	9
		equal or more 3 (three) but less than 4 (four)	2		
<b>IV</b>	2	equal or more 2 (two) but less than 3 (three)	3	4	6
		equal or more 1 (one) but less than 2 (two)	2		
<b>TOTAL</b>				<b>15</b>	<b>30</b>

<sup>6</sup> Any proposed key expert not meeting the minimum requirements will not be taken into consideration.

**LOT 1**

<b>Category</b>	<b>Field of expertise</b>
I	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF) ,or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 8 years of experience in performing organisational design, assessing strengths and weaknesses of an organisation and supporting in designing a best of breed new structure, which could include outsourcing services and/or using Artificial Intelligence tools.</p>
II	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF) ,or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 5 years of experience in performing organisational design, assessing strengths and weaknesses of an organisation and supporting in designing a best of breed new structure, which could include outsourcing services and/or using Artificial Intelligence tools.</p>
III	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 3 years of experience in performing organisational design, assessing strengths and weaknesses of an organisation and supporting in designing a best of breed new structure, which could include outsourcing services and/or using Artificial Intelligence tools.</p>
IV	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 1 year of experience in performing organisational design, assessing strengths and weaknesses of an organisation and supporting in designing a best of breed new structure, which could include outsourcing services and/or using Artificial Intelligence tools.</p>

**LOT 2**

<b>Category</b>	<b>Field of expertise</b>
I	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 8 years of experience in creating and implementing change management strategies and plans as to support project teams in integrating change management activities into their project plans. Experienced in conduct impact analyses, assess change readiness and identify key stakeholders.</p>
II	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 5 years of experience in creating and implementing change management strategies and plans as to support project teams in integrating change management activities into their project plans. Experienced in conduct impact analyses, assess change readiness and identify key stakeholders.</p>
III	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 3 years of experience in creating and implementing change management strategies and plans as to support project teams in integrating change management activities into their project plans. Experienced in conduct impact analyses, assess change readiness and identify key stakeholders.</p>
IV	<p>At least University (Master) Degree Level 7 in the European Qualifications Framework (EQF), or equivalent, in business administration, finance, economics, law, political science, engineering economy, or any related discipline. Fluency in speaking, reading and writing in English (level 1 of the self-assessment language table, Annex 7)</p> <p>At least 1 year of experience in creating and implementing change management strategies and plans as to support project teams in integrating change management activities into their project plans. Experienced in conduct impact analyses, assess change readiness and identify key stakeholders.</p>

**7.4.2.2 Framework Agreement Rates (Mark out of 30 points)**

**Only those tenders that have met the minimum scores required as set out in the technical award criteria table above will be eligible to have their Total Notional Price assessed as follows.** In their Offer, the tenderers have to submit the maximum daily rates for the delivery of services under the Framework Agreement for the 4 (four) categories of experts to be proposed for the performance of specific assignments, as described at point 3:

Category	Maximum Daily Rate (EUR)
I	
II	
III	
IV	

The above-mentioned rates shall be:

- fixed and non-revisable throughout the Framework Agreement 4-year duration and no indexation/fluctuation will be applied to the rates;
- quoted in EURO;
- free of taxes and duties (the EIB enjoys exemption from VAT under Article 3 of Protocol No 7 on the Privileges and Immunities of the European Communities);
- inclusive of any obligations arising from the technical specification (section 5 above), the terms and conditions of the Framework Agreement, as well as any clarifications published before the deadline date for submission of tenders;
- exclusive of VAT but inclusive of all billing elements and general expenses and overheads connected with the services to be rendered, including attendance at meetings at the EIB Headquarters in Luxembourg.

**Total Notional Price**

In order to arrive at a single comparative figure for evaluation purposes (Total Notional Price), the Bank will apply the following notional volumes to the above-mentioned rates:

	A	B	C
Category	Maximum Daily Rate (EUR) as defined by the tenderer	Notional Volume (Days)	Sub-Total (A*B)
I		3	
II		3	
III		7	
IV		7	
<b>Total Notional Price</b> (sum of all sub-totals in C)			

These notional volumes will be used for tender evaluation purposes only and shall not be construed as a commitment of services to be procured by the Bank under the Framework Agreement.

The admissible tender with the lowest Total Notional Price will be awarded the maximum score achievable (30) and all other Total Notional Prices submitted by the other admissible tenders will be scored using the following formula:

$$F_s = (F_{min} / F) \times 30$$

Where:

Fs = Financial score obtained

F = Tenderer's Total Notional Price

Fmin = the lowest valid Total Notional Price

## **8. List of appendices**

Appendix I: Lots detailed description

Appendix II: Backgrounds checks

Appendix I: Lots detailed description

**LOT No. 1: Strategic transformational change**

**A. TECHNICAL DESCRIPTION**

The EIB, as an EU institution that has rapidly grown over the last years, both in terms of size and volume of activities, would like to explore the opportunity of major transformational changes, that would provide the Bank with the right tools to continue making an impact in a fast changing world.

The service provider will be requested to perform organisational design, assessing strengths and weaknesses of the current organisation and supporting in designing a best of breed new structure that could include outsourcing services and/or using Artificial Intelligence (AI) tools.

The service provider will be requested to provide advice to EIB staff on the best ways to create a robust structure, which would give the opportunity to EIB staff to focus on impact creation, driving accountability while maximising collaboration.

While changing the organisation, the service provider will also be requested to provide insights and advice on the best ways to shift behaviour to shape the organisational culture that would support the management goals in the transformed environment.

The transformed organisation will have to be based on the new practices such as outsourcing, in order to focus on the core aspects of the business, while improving efficiency and productivity.

The service provider will be requested to integrate in the transformational analysis the new practices potentials, while supporting EIB staff in structuring the potential contractual arrangements.

If the already recognised practices that benefit the business strategy have to be implemented in the change, the service provider will also be requested to analyse the potential of the new technologies and their possible integration in EIB environment.

Those new technologies are mainly, but not limited to, the Artificial Intelligence programmes that could be implemented to support EIB staff in focusing on the main value creation activities.

**B. EXAMPLE OF KEY DELIVERABLES:**

- As-Is analysis and to-be organisation design, including detailed strategic benefits analysis, required change and detailed plan for implementation.
- Identification of organisational practices and advanced technologies to support the changing organisation in improving efficiency and productivity, while providing EIB staff with possibilities to make an enhanced impact.

**LOT No. 2: Project and change management**

**A. TECHNICAL DESCRIPTION**

The Bank's Operations Directorate defines on a regular basis new financial products and services subsequently translated into new procedures, processes and controls. As the EIB workforce has increased substantially over the last three year and it will stabilise in the years to come, service support will be requested to carry out project and change management activities, also based on "lean" process improvement methodologies and/or information management applications. In this context it is important to carefully manage Operations human capital along the following lines:

- ✓ Strategic dialogue: Improve communication of the Bank's strategic drivers;
- ✓ Knowledge sharing: Promote effective, targeted knowledge sharing;
- ✓ Process and procedures: Continuous improvement of working methods and procedures;
- ✓ Collaboration: Foster a culture of cooperation within OPS and facilitate interaction with other directorates;
- ✓ Management: Promote greater engagement of managers and improve internal organisation, including training.

The Service Provider will provide:

- project management capabilities, including organisational Project Management Office (PMO) activities, to the various organisational projects that are launched to support the structuring and growth of the Bank.
- change management capabilities, including changes to business processes, systems and technology, job roles and organization structures.
- inputs to EIB staff in relation to creating and implementing change management strategies and plans that maximize employee adoption and usage and minimize resistance.
- assistance to the EIB in coaching all levels of managers and supervisors through transitions.

**B. EXAMPLE OF KEY DELIVERABLES:**

- Creating and implementing change management strategies and plans to support project teams in integrating change management activities into their project plans.
- Conducting impact analyses, assessing change readiness and identifying key stakeholders.
- Providing input, document requirements and supporting the design and delivery of training programs.

**Appendix II: Backgrounds checks**

**Service provider's statement on background checks on external consultancies resources**

Ref.: our Framework Agreement for the provision of services ref. .... and EIB's Assignment Terms of Reference (ATOR) No. ....

Dear Sirs,

With reference to the General Terms and Conditions, section i. of Article 6, annexed to the Framework Agreement Contract with the EIB concerning the above mentioned Assignment we hereby declare that,

- we have access to documents (such as birth certificate, passport or identity document, and to the widest extent admissible under the applicable law to extracts from judicial records<sup>7</sup>) or equivalent information sources or databases that allows us to perform basic background checks concerning the integrity of those individuals proposed by us as staff resource(s) for implementing the assignment/contract; and
- we can, after reviewing the documents or information at our disposal,
  - ascertain the identity of the staff resources(s) involved in the implementation of the assignment/contract; and
  - exclude, to the extent feasible, that the proposed staff resource(s) pose a threat to data and information integrity and physical security at the EIB.

No.	Name	Profile/Role/Responsibility
1	.....	.....
2	.....	.....

We understand that the EIB reserves the right to access and review such documents or information upon request<sup>8</sup>, and such request will be analysed and honoured subject to terms and conditions of the applicable data protection regulations and/or prior consent of the staff in question to the disclosure of personal data, if required.

Furthermore, should at any time during the implementation of the assignment/contract new information in relation to deployed staff resource(s) arise that could be interpreted as possible threats to data and information integrity and physical security at the EIB, then the respective obligation to replace the staff resource(s) concerned shall apply (as set out in the Contract for Services and the General terms and conditions).

Yours sincerely,

**Company:** .....

**signature:** .....  
.....

**signatory name:** .....  
.....

**signatory title:** .....  
.....

<sup>7</sup> To the widest extent admissible under the applicable law, recent (**not older than 1 year**) extracts from the judicial record or, failing that, an equivalent document issued by a judicial or administrative authority in the country of residence of the consultant resource(s), or equivalent information or data source.

<sup>8</sup> To the exclusion of extract of judicial record.