



Tematica: Tender Servizi

Docente: Roberto Carpano



Farnesina
Ministero degli Affari Esteri
e della Cooperazione Internazionale



**Diplomazia
Economica
Italiana**



ITALIAN TRADE AGENCY

ICE - Agenzia per la promozione all'estero e
l'internazionalizzazione delle imprese italiane

Obiettivi del modulo

1. Identificare un tender specifico
2. Conoscere la fasi di una gara
3. Sviluppare una strategia per “entrare” nel mondo delle gare e identificare i partner
4. Redigere una Expression of Interests (Eoi), l’indice di una Technical Offer (TO) con esempi di contenuti per capitoli specifici
5. Sviluppare l’approccio per la redazione di una Financial Offer (FO)
6. Migliorare la redazione delle TO in base ai commenti dei valutatori e delle esperienze precedenti

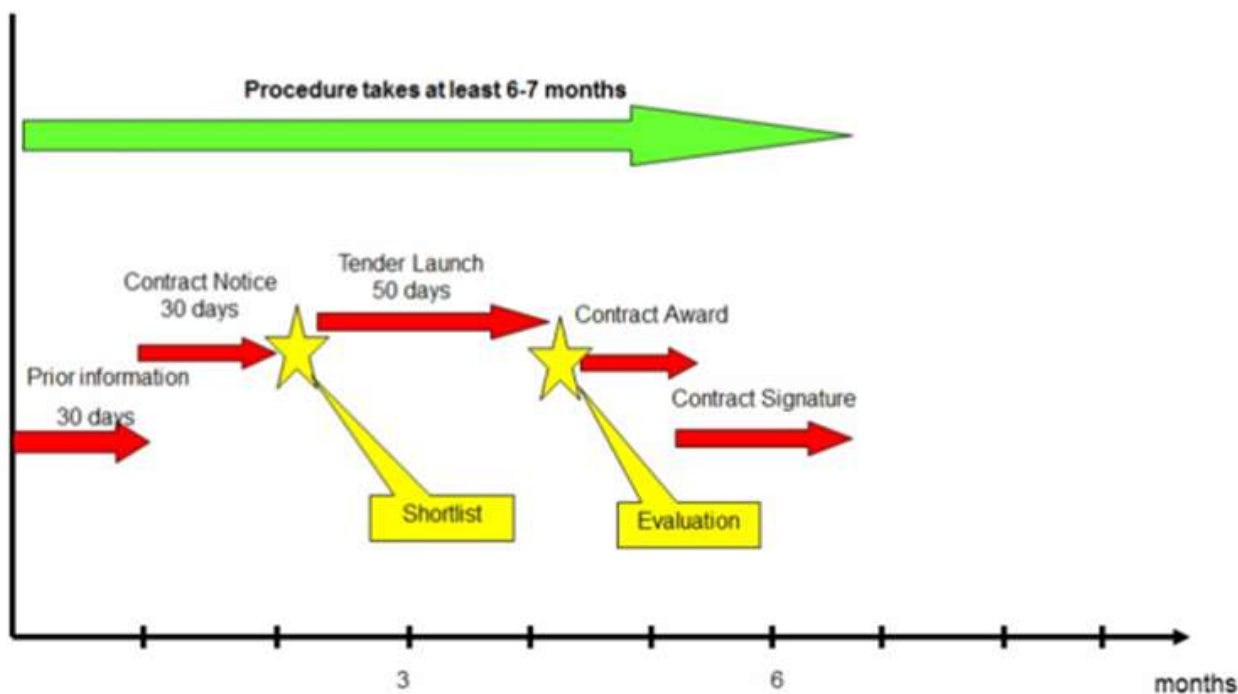
Introduzione: i servizi per lo sviluppo

Parole-chiave:

- «beneficio» e «comunità». Cosa si prefigge un intervento e a chi si rivolge.
- Ogni servizio è un «progetto», e non una semplice erogazione.
- Ogni progetto ha un suo «ciclo», che parte da un “problema da risolvere” e si conclude con la verifica dei risultati.
- Il prestatore di servizi non partecipa a tutto il ciclo, ma deve sempre tenerlo presente e conoscerne le fasi.
- Quali servizi. Tipologie e settori

1. Le fasi di una gara d'appalto di servizi

Timeline of an international restricted tender procedure for a service contract



1.1 Dove e quando intervenire

- Concetti base: gara aperta/ristretta, fonti, anticipazione
- L'importanza delle informazioni: anticipare!, anticipare !
dalla Notice al Forecast, dal Forecast alla Project Fiche o alla Strategy
- L'importanza del Sistema Paese
- Dove cercare queste informazioni: basta l'analisi dei siti web o meglio affidarsi ai servizi a pagamento?
- Muoversi subito. I primi giorni sono decisivi per fare le scelte giuste e per pianificare la strategia.
- Cosa fanno gli altri.

2. Identificare un tender specifico

Gli elementi distintivi da identificare:

- Oggetto
- Committente
- Durata
- Requisiti di partecipazione
- Budget

Forecast	Notice
X	X
X	X
X	X
	X
X	X

Domanda: Dov'è il capitolato??

2.1 Le Fonti

1. La Commissione Europea
2. Le Agenzie specializzate del sistema UE
3. La Banca Mondiale e le altre Banche Internazionali di Sviluppo
4. Il sistema delle Nazioni Unite
5. Gli altri attori internazionali (pubblici e privati)
6. E l'Italia???

2.1.1 Fonti di informazione per *tenders* internazionali



Donor	Regioni di intervento	Settori	Website
European Institutions Istituzioni UE Agenzie della UE DG della CE	Principalmente paesi EU	<i>I piu vari</i>	TED https://etendering.ted.europa.eu/general/page.html?name=home
EuropeAid Co-operation Office	<ul style="list-style-type: none"> - Europa tranne EU (Eastern Europe; Pre-accession) - America Latina (America centrale, Latina e Caraibi, Sud America, - Medio e Vicino Oriente (Paesi mediterranei, Golfo) - Africa (Africa centrale, sub-sahariana, orientale, occidentale, del sud, oceano indiano) - Asia (Asia centrale, South Asia, South East Asia) - Pacifico 	<i>Economic Grow, Food and agriculture Infrastructure Environment Energy Human development Human rights and governance Migration and asylum</i>	Online Services https://webgate.ec.europa.eu/europeaid/online-services/index.cfm?do=publi.welcome

2.1.2 Fonti di informazione per *tenders* internazionali



Donor	Regioni di intervento	Settori	Website
WB <i>World Bank</i> (Washington)	Africa, East-South Asia, America Latina, Medio oriente e Nord Africa EU centrale ex-URSS	<i>Poverty reduction; Sustainable development; Trade; Health; Climate change, Education, Energy, Conflicts & violence</i>	https://www.devbusiness.com
EBRD <i>European Bank for Reconstruction and Development</i> (Londra)	Mediterraneo Medio Oriente Europa Centrale e orientale Asia centrale	<i>Investments/advisory services for Industrial & economic development (agribusiness, infrastructure, transport); safeguarding environment (green economy/technologies, etc.)</i>	http://www.ebrd.com/work-with-us/procurement/project-procurement.html
ADB <i>African Development Bank</i> (Abidjan – Costa d’Avorio)	Nord Africa, Africa occidentale, orientale, centrale; Africa del Sud	<i>Agriculture & Agro-industry; climate change; Education, Energy, Environment, Health, ICT, Infrastructures, Private sector, Transport, Water supply & sanitation</i>	https://www.afdb.org/en/projects-and-operations/procurement/
IDB <i>Inter-American Development Bank</i> (Washington)	America Latina Caraibi	<i>Agriculture & rural dev; Education; Energy; Environment & nat disasters, Health, Industry, Private sector, tourism; S&T, Trade, Transport, Water supply & sanitation</i>	https://www.iadb.org/en/procurement
ADB <i>Asian Development Bank</i> (Mandaluyong -Filippine)	Asia Centrale Asia Orientale e Pacifico Asia Meridionale	<i>Infrastructure (energy, ICT, transport, urban development, water) Environment, Education, Health Agriculture and natural resources Public sector management</i>	https://www.adb.org/projects/tenders



2.1.3 Fonti di informazione per *tenders* internazionali

Donor	Regioni di intervento	Settori	Website
Organizzazioni UN: UNIDO; UNDP, UNOPS, FAO, IAEA, WHO, OSCE, ITU, ...(+di 15)	<i>tutte</i>	<i>tutti</i>	https://www.ungm.org United Nations Global Marketplace (UNGM) United Nations Global Service Centre (UNGSC)
UNIDO <i>United Nations Industrial Development Organization (Vienna)</i>	PVS (Africa, Asia, America Latina, PET (ex-URSS, Balcani, etc.)	<i>Industrial/economic development; safeguarding environment (green economy/technologies, etc.)</i>	https://procurement.unido.org/
UNDP <i>United Nations Development Programme (New York)</i>	PVS (+170 paesi)	<i>Sustainable development; Democracy & Peace Building, Climate & Disaster Resilience</i>	http://www.undp.org/content/undp/en/home/procurement.html
FAO <i>Food and Agriculture Organization (Roma)</i>	PVS (+130 paesi)	<i>Food Security and hunger defeat; Agriculture, forestry, fishery</i>	http://www.fao.org/unfao/procurement/bidding-opportunities/en/ (tender calendar) https://www.ungm.org
UNOPS <i>United Nations Office for Project Services (Copenhagen)</i>	PVS (+80 paesi)	<i>Perfezionamento supervisione progetti/servizi delle agenzie UN: health- sanitation; infrastructures; Humanitarian support</i>	https://www.unops.org/business-opportunities/current-opportunities (proc plan) https://www.ungm.org

3. I documenti di gara

Terminologia

UE (free access)

- Forecast
- Contract Notice
- Tender dossier

WB (a pagamento)

- General Procurement Notice
- Request for Expression of Interest
- Request for Services

3.1 Forecast (A1)

1. Reference
2. Procedure
3. Programme
4. Financing line
5. Contracting Authority
6. Typology
7. Description
8. Lots
9. Budget

TYPE FROM BY TEXT WEBSITE: http://ec.europa.eu/procurement/notice/403240-2012/TEXT/EN/HTML

RS-Pristina: IPA — Increase of competitiveness and export promotion
2012/S 246-403240

Location: Europe (non-EU) — Kosovo

Contract forecast notice

Services

Common procurement vocabulary (CPV):

Main object:

71356200 Technical assistance services

1. Publication reference:
EuropeAid/133848/C/SER/XK.
2. Procedure:
Restricted.
3. Programme:
IPA.
4. Financing:
IPA 2013/Commission Decision No 2013/024-216.
5. Contracting authority:
European Union, represented by the European Commission, on behalf of and for the account of the beneficiary country, Pristina, KOSOVO.
6. Nature of contract:
Fee-based.
7. Contract description:
To support the continuous development of Kosovo companies through improving their performance and overall competitiveness and to increase exports of products and services generated in Kosovo, as a means of reducing the trade deficit.
8. Numbers and titles of lots:
The contract is divided into lots: no, 1 lot only.
9. Budget:
Maximum budget: 2 000 000 EUR.
10. Intended timing of publication of procurement notice:
July 2013.
11. Additional information
12. Legal basis:
IPA Council Regulation (EC) No 1085/2006 as adopted on 17.7.2006.
13. Date of dispatch of this notice:
16.12.2012

3.2 Contract Notice (A2)

1. Data
2. Specifications
3. Conditions of Participation
 - 3a. Eligibility
4. Timetable
5. Selection Criteria
6. Award Criteria
7. Application modality

SERVICE CONTRACT NOTICE
Increase of competitiveness and export promotion
Location – Kosovo

CONTRACT DATA

CONTRACT SPECIFICATION

CONDITIONS OF PARTICIPATION

11. Eligibility
 12. Candidature
 13. Number of applications
 14. Shortlist alliances prohibited
 15. Grounds for exclusion
 16. Sub-contracting
 17. Number of candidates to be short-listed
-

PROVISIONAL TIMETABLE

SELECTION AND AWARD CRITERIA

APPLICATION

23. Deadline for receipt of applications
24. Application format and details to be provided
25. How applications may be submitted
26. Alteration or withdrawal of applications
27. Operational language
29. Legal basis

3.2.1 Selection and Award Criteria (A2)

Selection Criteria:

1. Economic and Financial Capacity
2. Professional Capacity
3. Technical Capacity
- 3a. Basic Requirements
- 3b. Re-examination Requirements

Award Criteria:

1. Value for money

SELECTION AND AWARD CRITERIA

21. Selection criteria

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

- 1) **Economic and financial capacity of candidate** (based on item 3 of the application form). In case of candidate being a public body, equivalent information should be provided. The reference period which will be taken into account will be the last three years for which accounts have been closed.
 - The average annual turnover of the candidate for the last 3 years (2012, 2013, 2014) shall amount to at least 4,000,000.00 EUR.
- 2) **Professional capacity of candidate** (based on items 4 and 5 of the application form). The reference period which will be taken into account will be the last three years from submission deadline.
 - At least 6 staffs currently work for the candidate in fields related to this contract.
- 3) **Technical capacity of candidate** (based on items 5 and 6 of the application form). The reference period which will be taken into account will be the last three years from submission deadline.

The candidate has provided services during the last three years (starting from 01.01.2012 up to the deadline for receipt of applications) under **at least 2 projects** covering the following fields of specialisation:

- Development and implementation of Export Trade Promotion Strategy, including provision of services to domestic enterprises in the field.
- Institutional and regulatory framework for SME policy making and/or operational Environment for Business creation.

The value of the services carried out by the candidate under **each** project shall amount to at least EUR 1,000,000.00. A project may cover one or more of these fields of specialisation, but **all fields** have to be covered by **at least two** projects.

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

An economic operator may, 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. 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, for example by producing an undertaking 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 notably that of nationality, as the economic operator.

If more than 8 eligible candidates meet the above selection criteria, the relative strengths and weaknesses of the applications of these candidates must be reexamined to identify the eight best candidates. The only factors which will be taken into consideration during this re-examination are:

- the highest number of projects found eligible under 21.3.1;

in case of equality of this criterion, then

- the highest cumulative value of projects found eligible under 21.3.1.

22. Award criteria

Best value for money.

3.2.2 Come dimostrare di rispondere ai selection criteria

Criteria

1. Economic and Financial Capacity
2. Professional Capacity
3. Technical Capacity
 - 3a. Basic Requirements
 - 3b. Re-examination Requirements

Proofs

Bilanci e financial ratio

Auto-dichiarazione

Referenze progetti

Nota bene: **questi criteri sono puramente QUANTITATIVI**

3.3 Administrative Compliance: i documenti necessari

- Certificato di Iscrizione sezione Ordinaria Camera di Commercio con menzione di non fallimento e nulla osta anti mafia
- Casellario giudiziario
- Certificazione carichi pendenti Agenzia delle Entrate
- Regolarità contributiva INPS INAIL

3.4 Esercitazione 1

comprensione della “*Procurement Notice*”: Kosowo – Increase of Competitiveness and Export Promotion – IPA 133848

La mia azienda risponde ai “Selection criteria”?

E se i “Selection criteria” non sono soddisfatti?

4. Sviluppare una strategia per iniziare

Posso partecipare?

I fattori-chiave:

- Interesse – l'argomento coincide con le mie competenze
- Area geografica – sono in grado di affrontare la diversità
- Volume finanziario – il budget è troppo importante / il mio fatturato mi consentirà la gestione del servizio
- Referenze (esperienze documentate pregresse) – posso superare i criteri di pre-selezione / ho bisogno di ALLEATI

4.1 Come iniziare nel mondo *tenders internazionali* quando non si ha esperienza specifica o un fatturato rilevante

- Identificate i vostri **punti di forza** e selezionate solo gare dove avete un “**vantaggio competitivo**”, che vuol dire...
- non è detto che non abbiate alcuna “**esperienza specifica**”: pensate bene alla vostra attività e siate “creativi”
- Se non soddisfatte tutte le technical / financial capacities richieste avete almeno 2 strumenti a disposizione: **undertaking e partnership**

4.2 Il Partenariato

- Un Partenariato “forte” vuol dire...
- Quando scegliere un partner
- Il concetto-chiave: SINERGIA. Non sovrapporsi, ma completarsi
- Come trovare i partner
- Presentarsi a partner potenziali: comunicare subito il proprio valore aggiunto
- Cosa vuole sapere il vostro partner
- La regola d’oro: PATTI CHIARI. Da subito
- Gli accordi di partenariato

4.3 L'”undertaking”

- Una alternativa «soft» al partenariato
- Come funziona (solo in ambito comunitario)
- Le responsabilità dell'”undertaker”
- I documenti da produrre
- Vantaggi e rischi

4.4 Un esempio di Memorandum of Understanding

Gli elementi-chiave:

- Chi prende la leadership
- La responsabilità congiunta
- La ripartizione delle attività
- Le quote di profitto
- L'impegno di non-recessione

Memorandum of Understanding

Title of the project:

Client:

The following companies: and hereby enter into an agreement for the purpose of the preparation and submission of a joint proposal for the above mentioned project, as follows:

1. The parties hereto agree to perform the services required to work out a joint proposal and to pursue these services in mutual consent, and exert all efforts to achieve the goal of being awarded the contract.
2. If successful, the present agreement will be superseded by an Association Agreement, which shall remain in effect for the duration of the contract between the Association and the Client, until all rights and duties arising out of this agreement have been settled. This Association shall be based on the provisions of this pre-bidding agreement and the contract with the client.
3. The parties agree to work exclusively together for this project during the entire duration of this agreement. Complete or partial assignment or transfer of interest or shares of orders to other parties cannot take place without the consent of the other party.
4. After award of contract, the parties hereto agree to form an Association Agreement of unincorporated nature for the performance of the work.
5. (Italy) is the Lead Company.
 - The Lead Company shall represent the Association and conduct the necessary negotiations and correspondence as may be required, on behalf of the Association/Consortium. Any decision or agreements binding upon the other parties not contemplated in the Association Agreement or in the contract with the client require the prior approval of the other parties.
 - Role and responsibilities will include:
 - Day to day liaison with the Client
 - Reporting on progress of Contract both to Client and Consortium Partners
 - Provide quality control on reports and project outputs
 - Financial management including requesting advancing, preparing invoices, payments to Consortium Partners etc.
 - Organising and chairing Consortium meetings
 - The Lead Company shall be compensated for administration and management of the project by a management fee of XX% of the professional fees.
6. The parties agree to share profit (or loss) accrued as a result of the present agreement and of the subsequent Association Agreement according to the same ratio, provided that the following rules are accepted:

5. La redazione di una Expression of Interests

EU

Fixed Templates

- Financial data
- Professional data
- Project references
- Declaration on eligibility
- Statements

WB

No Templates

- Letter of request
- Company presentation
- Overall experience
- Project references
- Brochures

5.1 La struttura di una Eol della UE

Version March 2016

Circulation restricted to the Contracting Authority and to the author of the document to protect the individual and to protect privacy, commercial and industrial secrecy

APPLICATION FOR EU/EDF-FUNDED SERVICE CONTRACT

Contract notice: < Publication reference >

<Contract title>
<Lot number & lot title, if applicable>

Please supply one signed application (for each lot, if the tender procedure is divided into lots), together with three copies. For economical and ecological reasons, we strongly recommend that you submit your files on paper (no plastic folder or divider). We also suggest you use double-sided printing wherever possible. Your application must include a signed declaration using the annexed format from each legal entity making the application. All data included in this application must concern only the legal entity or entities making the application.

Any additional documentation (brochures, letters etc.) sent with your application will not be taken into consideration. Applications submitted by a consortium (i.e. either a permanent, legally-established grouping or a grouping set up informally for a specific tender procedure) must follow the instructions applicable to the consortium leader and its members.

An economic operator may, 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. If they do, they must prove to the contracting authority that they have the resources needed to perform the contract, for example by producing a commitment from those entities to place resources at their disposal. Such entities, for instance the parent company of the economic operator, must respect the same rules of eligibility and nationality as the economic operator, as well as the relevant selection criteria. 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 those capacities are required. With regard to economic and financial criteria, the entities upon whose capacity the tenderer relies, become jointly and severally liable for the performance of the contract.

1 SUBMITTED by (i.e. the identity of the Candidate)

	Name(s) of legal entity or entities making this application	Nationality ¹
Leader ²		
Member		
Etc ...		

(A4)

Declaration on honour on exclusion criteria and selection criteria

The undersigned *[insert name of the signatory of this form]*, representing:

<i>(only for natural persons)</i> himself or herself	<i>(only for legal persons)</i> the following legal person:
ID or passport number: (“the person”)	Full official name: Official legal form: Statutory registration number: Full official address: VAT registration number: (“the person”)

I – SITUATION OF EXCLUSION CONCERNING THE PERSON

(1) declares that the above-mentioned person is in one of the following situations:	YES	NO
(a) it is bankrupt, subject to insolvency or winding up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under national legislation or regulations;	☐	☐
(b) it has been established by a final judgement or a final administrative decision that the person is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the law of the country in which it is established, with those of the country in which the contracting authority is located or those of the country of the performance of the contract;	☐	☐
(c) it has been established by a final judgement or a final administrative decision that the person is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the person belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibility where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:		
(i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of selection criteria or in the performance of a contract;	☐	☐
(ii) entering into agreement with other persons with the aim of distorting competition;	☐	☐
(iii) violating intellectual property rights;	☐	☐
(iv) attempting to influence the decision-making process of the contracting authority during the award procedure;	☐	☐
(v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;	☐	☐
(d) it has been established by a final judgement that the person is guilty of the following:		

(A5)

5.1.1 Economic and financial Capacity

Financial data Data requested in this table must be consistent with the selection criteria set in the contract notice	2 years before last year ¹ <specify> €	Year before last year <specify> €	Last year <specify> > €	Average ² €	[Past year €]**	[Current year €]**
Annual turnover ³ , excluding this contract						
Current Assets ⁴						
Current Liabilities ⁵						
[Current ratio (current assets/current liabilities)]	Not applicable	Not applicable		Not applicable	Not applicable	Not applicable]

¹ Last year=last accounting year for which the entity's accounts have been closed.

² Amounts entered in the 'Average' column must be the mathematical average of the amounts entered in the three preceding columns of the same row.

³ The gross inflow of economic benefits (cash, receivables, other assets) arising from the ordinary operating activities of the enterprise (such as sales of goods, sales of services, interest, royalties, and dividends) during the year.

⁴ A balance sheet account that represents the value of all assets that are reasonably expected to be converted into cash within one year in the normal course of business. Current assets include cash, accounts receivable, inventory, marketable securities, prepaid expenses and other liquid assets that can be readily converted to cash.

⁵ A company's debts or obligations that are due within one year. Current liabilities appear on the company's balance sheet and include short term debt, accounts payable, accrued liabilities and other debts.

5.1.2 Professional Capacity

Please provide the following personnel statistics⁸ for the current year and the two previous years.

Average manpower	Year before last		Last year		This year	
	Overall	Total for fields related to this contract ⁹	Overall	Total for fields related to this contract ⁹	Overall	Total for fields related to this contract ⁹
Permanent staff ¹⁰						
Other staff ¹¹						
Total						
Permanent staff as a proportion of total staff (%)	%	%	%	%	%	%

⁸ if this tender is being submitted by a consortium, the data in the table above must be the sum of the data in the corresponding tables in the declarations provided by the consortium members – see point 7 of this tender form for a supply contract.

⁹ corresponding to the relevant specialisms identified in point 5 below

¹⁰ staff directly employed by the Tenderer on a permanent basis (ie, under indefinite contracts)

¹¹ other staff not directly employed by the Tenderer on a permanent basis (ie, under fixed-term contracts)

5.1.3 Technical Capacity

Ref # (maximum 15)	Project title		...					
Name of legal entity	Country	Overall supply value (EUR) ¹	Proportion supplied by legal entity (%)	No of staff provided	Name of client	Origin of funding	Dates	Name of members if any
...	...	...	...	...	...	...	...	...
Detailed description of supply						Related services provided		
...						...		

¹ Amounts actually paid, without the effect of inflation.

Nota: Per ciascun contratto reperire una ***letter of reference*** (certificate of execution/*installation acceptance*)

5.2 Il tempo dell'attesa: si può sempre fare qualcosa

- Raccogliamo informazioni, ma attenzione a non disturbare il manovratore
- Le visite sul campo: vantaggi e svantaggi
- Se abbiamo dei possibili candidati per il team contattiamoli. Se non li abbiamo, cominciamo a contattarli: Quando arriverà il dossier di gara, i migliori saranno già impegnati
- Verifichiamo la documentazione amministrativa. Meglio avere qualcosa in più, che essere in difetto all'ultimo momento.

6. Siamo in shortlist

Come redigere la Technical Offer

- Come avvengono le comunicazioni
- Cosa ci arriverà. Il Tender Dossier (cartaceo o elettronico)
- Cosa fare:
 - Controllare i documenti
 - Controllare la scadenza di presentazione
 - Avvertiamo i nostri partner
 - Organizziamo il team di lavoro
 - Controlliamo i nostri competitor

6.1 II Tender Dossier

08.1_Annex VI Guarantee.pdf
08.2_Annex VI LEF company.pdf
08.3_Annex VI FIF.pdf
09_Annex VII Exp verif.doc
09_Annex VII Exp verif.pdf
10_Shortlist_Notice.pdf
11_Administrative Grid.pdf
12_Evaluation Grid.pdf
13_Tender Form.doc
13_Tender Form.pdf
01_Instructions_to_Tenderers.pdf
02_Draft_Contract_&_Special_Conditions.pdf
03_Annex I GC_en.pdf
04_Annex II ToRs.pdf
05_Annex III Org & Meth.doc
05_Annex III Org & Meth.pdf
06_Annex IV experts.doc
06_Annex IV experts.pdf
07_Annex V - Budget.pdf
07_Annex V Budget.xls
08.1_Annex VI Guarantee.doc

Gli elementi-chiave:

- Information to Tenderers
- Terms of References
- Evaluation Grid
- Draft Contract

6.1.1 E' tutto chiaro? (il segreto è nei particolari)

- Chi prepara il Tender Dossier è uno come noi
- La forma è sostanza. Non esistono aspetti di cui non tenere conto
- Qualsiasi dubbio: formuliamo una richiesta di chiarimenti
- Come e quando formulare la richiesta di chiarimenti.
- Aspetti frequenti.

6.1.2 Da dove iniziare?

- Il GANTT interno
- Le competenze tecniche per la redazione
- Lo schema logico dell'intervento
- Il team
- La scrittura
- I documenti di supporto

6.2 La to-do list temporizzata - GANTT

[illegible]

(A6)

6.3 L'Evaluation Grid

	Maximum
Organisation and methodology	
Rationale	10
Strategy	30
Back-up function	5
Involvement of all members of the consortium	5
Timetable of activities, including the number of expert days proposed	10
Total score for Organisation and methodology	60
Key experts	
<Key expert 1> (Max 20 points)	
Qualifications and skills	3
General professional experience	5
Specific professional experience	12
<Key expert 2> (Max 20 points)	
Qualifications and skills	3
General professional experience	5
Specific professional experience	12
Total score for Key experts	40
Overall total score	100

(A7)

6.4 I Terms of Reference

Il contenuto standard:

- Background
- Obiettivi
- Condizionalità
- Attività
- Luogo e durata
- Mezzi e risorse
- Reporting
- Monitoraggio

Final

ANNEX II: TERMS OF REFERENCE

1. BACKGROUND INFORMATION	2
1.1. Partner country	2
1.2. Contracting Authority	2
1.3. Country background	2
1.4. Current situation in the sector	3
1.5. Related programmes and other donor activities	5
2. OBJECTIVE, PURPOSE & EXPECTED RESULTS	7
2.1. Overall objective	7
2.2. Purpose	7
2.3. Results to be achieved by the Contractor	7
3. ASSUMPTIONS & RISKS	7
3.1. Assumptions underlying the project	7
3.2. Risks	8
4. SCOPE OF THE WORK	8
4.1. General	8
4.2. Specific work	9
4.3. Project management	12
5. LOGISTICS AND TIMING	12
5.1. Location	12
5.2. Start date & period of implementation	13
6. REQUIREMENTS	13
6.1. Staff	13
6.2. Office accommodation	17
6.3. Facilities to be provided by the Contractor	17
6.4. Equipment	17
6.5. Incidental expenditure	17
6.6. Lump sums	18
6.7. Expenditure verification	18
7. REPORTS	18
7.1. Reporting requirements	18
7.2. Submission & approval of reports	20
8. MONITORING AND EVALUATION	20
8.1. Definition of indicators	20
8.2. Special requirements	20

(A8)

6.5 Esercitazione 2

Lettura del TD e formulazione di richieste di chiarimenti

6.6 Alcuni consigli pratici

- Non cercare di dimostrare di essere il più bravo in forma autoreferenziale
- Non inserire “attività” non richieste che non producano valore aggiunto
- La Forma e’ espressione della sostanza: grafica, layout, ortografia
- Non cercare di fare tutto da soli per risparmiare
- Non tradurre cose scritte in un’altra lingua
- Mettere all’inizio (della offerta o comunque dei capitoli) le cose più importanti e qualificanti
- Gestire il tempo...

6.6.1 La selezione del team

- Quanto conta il team in una gara di servizi
- Gli esperti: free-lance o in-house?
- I criteri di selezione vanno presi alla lettera
- Come «preparare» un cv
- Negoziare e chiudere un accordo
- Coinvolgere il team nella redazione dell'offerta
- I documenti di accompagnamento dell'esperto
- Conflitto di interessi e disponibilità
- La professionalità del Team vale oro: vuol dire...

6.7 La redazione della OT

Il contenuto standard:

- Rationale: comprensione dei ToR
- Strategy: approccio, attività e risultati
- Backstopping: il vostro valore aggiunto nella realizzazione
- Involvement: divisione dei ruoli tra partner
- Timetable: impiego delle risorse lungo la durata
- Log-frame: schema logico del progetto

ANNEX III: ORGANISATION & METHODOLOGY

1. RATIONALE

- Any comments you have on the Terms of Reference for the successful execution of activities, in particular regarding the objectives and expected results, thus demonstrating the degree of understanding of the contract. Your 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.

2. STRATEGY

- An outline of the approach proposed for contract implementation.
- A list of the proposed tasks you consider necessary to achieve the contract objectives.
- Inputs and outputs.

3. BACKSTOPPING

- A description of the support facilities (back-stopping) that the contractor will provide to the team of experts during execution of the contract. The back-up function will be assessed in the evaluation and should be carefully explained in the organisation and methodology, including the list of staff, units, capacity of permanent staff regularly intervening as experts on similar projects, provision of expertise in the region/country or origin as well as partner countries, organisational structure, etc. which are supposed to ensure that function, as well as the available quality systems and knowledge capitalisation methods and tools, within the respective members of the consortium.
- A description of any subcontracting arrangements with a clear indication of the tasks that will be entrusted to subcontractors and a statement by the tenderer guaranteeing the eligibility of subcontractors.

4. INVOLVEMENT OF ALL MEMBERS OF THE CONSORTIUM

- If a tender is submitted by a consortium, a description of the input from each member of the consortium 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. If the tender is submitted by a single company, the total of available points for this part in the evaluation grid will be allocated.

5. TIMETABLE OF WORK

- The timing, sequence and duration of the proposed tasks, taking into account travel time.
- The identification and timing of major milestones in executing 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.
- The methodologies contained in the offer should include a work plan indicating the envisaged resources to be mobilised.
- The expected number of working days required from each category of expert each month during the period of execution of the contract (using the Excel spreadsheet linked to the Budget breakdowns).]

6. LOG FRAME

A logical framework reflecting the considerations described in items 1 – 3 (see the Project Cycle Management Manual available from the PCN Home page:

https://ec.europa.eu/europeaid/aid-delivery-methods-project-cycle-management-guidelines-vol-1_en).

6.8 Esempio di Table of Contents

Manteniamo una logica nell'esposizione:

- Comprensione
- Descrizione
- Approccio complessivo
- Metodologie applicate
- Articolazione del lavoro
- Organizzazione
- Team
- Backstopping
- Tempistica

1.	RATIONALE
1.1	Project Background
1.1.1	Current economic situation in Kosovo
1.1.2	Institutional and legal framework
1.1.3	Existing strategies in relevant sectors
1.1.4	Related programs and donors' strategies
1.1.5	Relevant documents
1.2	Understanding of the TOR
1.2.1	Origin and relevance of the project
1.2	Project Objectives and Results
1.2.3	Key issues for project implementation
1.3	Assumptions and Risks
1.3.1	Assumptions
1.3.2	Risks and Mitigation measures
2	STRATEGY
2.1	Strategic Approach
2.1.1	Project structure
2.1.2	Approach to the implementation of project activities
2.1.3	Addressing the Project Key Issues
2.2	Methodologic approach
2.2.1	Approach to Capacity Building Activities
2.2.2	Approach to Private Sector development and increase of SME
2.2.3	Approach to Export Promotion
2.2.4	Approach to visibility and communication
2.3	Inception phase
2.4	Component 1: Improve performance and competitiveness of Kosov not defined.
2.4.1	Activity 1.1 - Capacity Building of Department of Industry MTI
2.4.2	Activity 1.2 - Development of Kosovo Industrial Policy
2.4.7	Timetable of Component 1
2.4.8	Inputs of Component 1
2.5	Component 2: Improve performance and overall competitiveness o Bookmark not defined.
2.6	Component 3: Export Promotion
2.7	Component 4: Awareness and Communication
3	PROJECT MANAGEMENT AND BACKSTOPPING
3.1	Management Structure
3.2	Project Staffing
3.3	Monitoring and evaluation
4	BACKSTOPPING AND SUPPORTING FACILITIES
4.1	Technical Backstopping Support to the project
4.2	Logistics Support
4.3	Administrative and Financial backstopping
5	INVOLVEMENT OF ALL THE MEMBERS OF THE CONSORTIUM
5.1	Consortium composition
5.2	Involvement of all Consortium members
6	TIMETABLE OF ACTIVITIES
7	LOGICAL FRAMEWORK

6.9 Esercitazione 3

Sulla base dei ToR e della Evaluation Grid, identificate i nomi dei capitoli per l'indice dell'OT ed il loro peso relativo come n. di pagine

7. L'Offerta Finanziaria

Cosa bisogna considerare:

- Non tutto può rientrare nelle voci del budget
- Le componenti di prezzo: onorari e spese accessorie
- Cosa includere negli onorari: tutti i costi afferenti all'impiego delle risorse umane
- Le spese extra-budget, come coprirle
- Lo sconto sulla base dell'appalto
- La ripartizione con i partner
- La rendicontazione e l'audit

7.1 Esempio di budget

Item	Fee rate/working day	Quantity	Unit	Price		Costs	
				Total EUR	Quantity	Unit	Total EUR
I FEES							
Expert 1	fee rate/working day	660	875,00	577.500,00	30,00	11.000,00	330.000,00
Expert 2	fee rate/working day	660	610,00	402.600,00	30,00	6.600,00	198.000,00
establishment experts					2	5.000,00	5.000,00
vehicle					1,0	25.000,00	
office running costs					36,0	500,00	18.000,00
support staff					36,0	700,00	25.200,00
International travels					10,0	1.200,00	12.000,00
Luggage					2,0	0,00	0,00
Insurance					72,0	150,00	10.800,00
subtotal							
Other Experts senior	fee rate/working day	500	900,00	450.000,00	500	450,00	225.000,00
Other Experts med		440	600,00	264.000,00	500	300,00	150.000,00
Per Diems					600	135,00	81.000,00
int. Travels					30	1.000,00	30.000,00
Insurance					40	170,00	6.800,00
subtotal							
TOTAL FEES				1.694.100,00			1.091.800,00
II INCIDENTAL EXPENDITURES				200.000,00			200.000,00
III AUDIT				50.000,00			50.000,00
MAXIMUM CONTRACT VALUE				1.944.100,00			1.341.800,00
				2.100.000,00			602.300,00

(A11)

8. Come migliorare grazie all'esperienza

- Oggettività vs soggettività dei risultati
- Contestazioni e opposizioni: conviene??
- Chiedere (e ottenere) dettagli sul risultato
- Il tasso di (in)successo
- Competizione e posizioni dominanti. Come difendersi
- Frode e corruzione

8.1 La cultura del follow-up

- Comprendere i punteggi attribuiti
- Concentrarsi sulle debolezze...
- ... ma non dimenticare i punti di forza
- Costruire un archivio-gare per non ripartire ogni volta da zero: i “surgelati” ...
- Valutare il team interno e i risultati raggiunti
- Discutere apertamente con i partner sui miglioramenti

8.2 Come raffinare la strategia

- Non esiste la gara della vita: nello stesso tender ci saranno sempre almeno due competitor sicuri di vincere
- Mi concentro su pochi obiettivi o sono selettivo ovvero: Onnivoro o Vegano?
- Costruire un team di gara stabile: l'esperienza aiuta
- Selezionare dei paesi-target. Non inseguite tender in giro per il mondo; meglio acquisire informazioni e contatti su un'area dove avete un "vantaggio": quale ?
- Siate flessibili e adattabili. Non applicate un modello di lavoro rigidamente quando non dà risultati
- Accettare ruoli da "gregario" pur di entrare nel mercato

8.3 Abbiamo vinto: il lavoro inizia adesso !

- L'aggiudicazione è un punto di partenza e non di arrivo
- La nostra forza è la REPUTAZIONE, quindi bisogna mettere ogni sforzo per la buona riuscita dell'intervento
- Leggiamo bene TUTTO il contratto
- Facciamo un PIANO di ATTIVITÀ' FINANZIARIO sostenibile: vuol dire...
- Organizziamo un team di GESTIONE, e presentiamoci al cliente con le idee chiare.

Thanks and
Fingers Crossed !