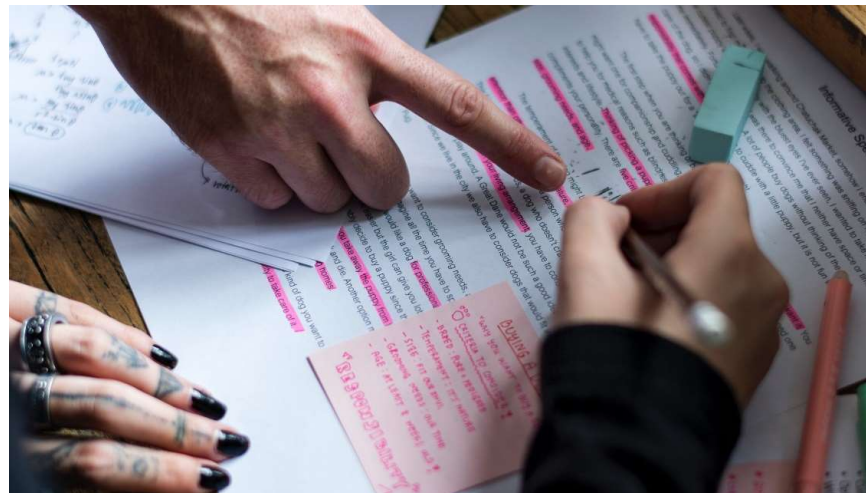


# Com elaborar ofertes tècniques guanyadores en licitacions multilaterals

09 de març de 2021, 09:00h-11:50h

- Consultor Jordi del Bas
- Oficina Tècnica de Contractació Pública Internacional d'ACCIÓ



## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70'	<b>Marc de valoració d'una oferta tècnica – Part 1</b> Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 15'	<b>Pausa de descans</b> Vídeo ACCIÓ
10:40h 70'	<b>Marc de valoració d'una oferta tècnica – Part 2</b> Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	<b>Fi de la sessió</b>



# Què és ACCIÓ?

És l'agència del Govern de la Generalitat de Catalunya per a la competitivitat de l'empresa

El client principal és la **PIME**, que conforma el **98% del teixit empresarial de Catalunya**

- Contribuir a l'èxit de les empreses en el mercat a través del foment de la competitivitat i la connexió a escala internacional.

Missió



- Ser l'Agència referent per a les empreses en impuls de la competitivitat en una Catalunya industrial, innovadora, connectada internacionalment i atractiva per al talent i els negocis empresarials.

Visió



Adaptabilitat  
Personalització i empatia  
Expertesa  
Implicació  
Excel·lència  
Transparència  
Lideratge  
Aprentatge

Valors



ACCIÓ

 Generalitat de Catalunya

 enterprise europe network  
Apretem Europa a la teva empresa

 European Commission

Fem avui l'**empresa** del demà  
3 [accio.gencat.cat](http://accio.gencat.cat)

## Principals instruments per a la Internacionalització

- Assessorament especialitzat.
- Eines de suport a la iniciació i consolidació de mercats internacionals.
- Instruments per a la implantació a l'exterior.
- Oficina Tècnica de Contractació Pública Internacional.
- Oficina Tècnica de Barreres a la Internacionalització.
- Finestreta Brexit.
- Cooperació empresarial internacional (EEN)
- Acreditació d'agents de suport a la internacionalització
- Xarxa de 40 oficines exteriors amb un àmbit d'actuació a més de 100 mercats.

## Xarxa de 40 Oficines Exteriors d'Acció

Xarxa global de 40 oficines, per facilitar-te la implantació comercial i productiva a més de 110 mercats, amb professionals oferint serveis especialitzats

### SERVEIS OFICINES EXTERIORS

- ❖ Identificació de canals de comercialització i d'aprovisionament
- ❖ Anàlisi de mercat
- ❖ Elaboració d'agendes de contactes
- ❖ Implantació
- ❖ Espais de *Soft Landing*
- ❖ Cerca de personal en destinació



Accedir-hi: <http://www.accio.gencat.cat/ca/serveis/oficines-exteriors/>

# Oficina Tècnica de Contractació Pública Internacional

## *Eines i serveis:*

- Sessions de **Formació i capacitació** per permetre a l'empresa desenvolupar la seva estratègia en Contractació Pública Internacional.
- Resolució de dubtes i consultes específiques.
- **Sessions** tècniques i de presentació d'oportunitats, informació sobre els mercats internacionals amb més potencial.
  
- **Serveis personalitzats:**
  - Capacitació (Estratègica & Tender Review Service);
  - Accés a client públic;
  - Multilaterals.

***A qui va dirigit?*** Empreses amb experiència en els mercats exteriors de client públic o aquelles que s'hi aproximem per primera vegada.

***Més informació:*** <http://www.accio.gencat.cat/ca/serveis/internacionalitzacio/serveis-sectorials-i-especialitzats/contractacio-publica-internacional/>

# Oficina Tècnica de Contractació Pública Internacional

Cicle de Webinars CPI 2020:

- 21/MAI - [Licitacions internacionals: escenaris, reptes i oportunitats de la Covid-19](#)
- 15/JUN - [Oportunitats en licitacions internacionals en l'àmbit de la Green Economy](#)
- 07/JUL - [T'apropem a les oportunitats del client públic al Brasil](#)
- 15/SET - [Aprèn a licitar al Canadà i als països nòrdics](#)
- 11/NOV - [Licitacions als Balcans orientals i a Romania](#)

# Oficina Tècnica de Contractació Pública Internacional

---

Cicle de Webinars CPI 2021:

- 11/FEB – [T'apropem a les licitacions UE](#)
  - 09/MAR – [Training CPI Com elaborar ofertes tècniques guanyadores en licitacions multilaterals](#)
  - 15/ABR – Oportunitats en licitacions a l'Àfrica
  - JUNY – Oportunitats en licitacions UE en GREEN ECONOMY
  - JULIOL – Training CPI Treballem les ofertes tècniques sota una perspectiva anglosaxona
  - OCTUBRE – Oportunitats en licitacions UE en DIGITALIZATION
- 
- Missions 2021: Romania (JUNY)



## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70''	<b>Marc de valoració d'una oferta tècnica – Part 1</b> Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 10'	Pausa de descans Vídeo ACCIÓ
10.40h 70'	<b>Marc de valoració d'una oferta tècnica – Part 2</b> Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	Fi de la sessió



# Acte possible gràcies a l'Europe Enterprise Network-EEN



enterprise  
europe  
network

HOME THE NETWORK ADVICE AND SUPPORT PARTNERSHIP OPPORTUNITIES EVENTS SUCCESS STORIES BLOG

## Helping companies innovate and grow internationally



### International partnerships

Expertise, contacts and events to connect you with the right international partners to grow your business.



### Advice for international growth

Expert advice for growth and expansion into international markets.



### Support for business innovation

Solution-driven services to help you turn your innovative ideas into international commercial successes.

- **EU legislation and standards**

We help you apply EU regulations and comply with standards (e.g. CE marking)

- **Access to international markets**

We provide you with market intelligence and capacity building services, identify markets for growth and advise on local business conditions.

- **International public contracts**

We map existing cross-border and EU tender opportunities and help you apply

- **Finance and funding**

We help you identify sources of finance and ensure your business is investor ready

- **EU funding and application support**

We identify EU funding opportunities that suit your business' needs and help you

- **Intellectual property rights (IPR)**

We help you protect and expand your IPR, and draft your patents and IPR exploitation strategies.

- **Energy and resource efficiency**

We help you understand and source the best technologies for your business, and finance opportunities for eco-innovation and green entrepreneurship.

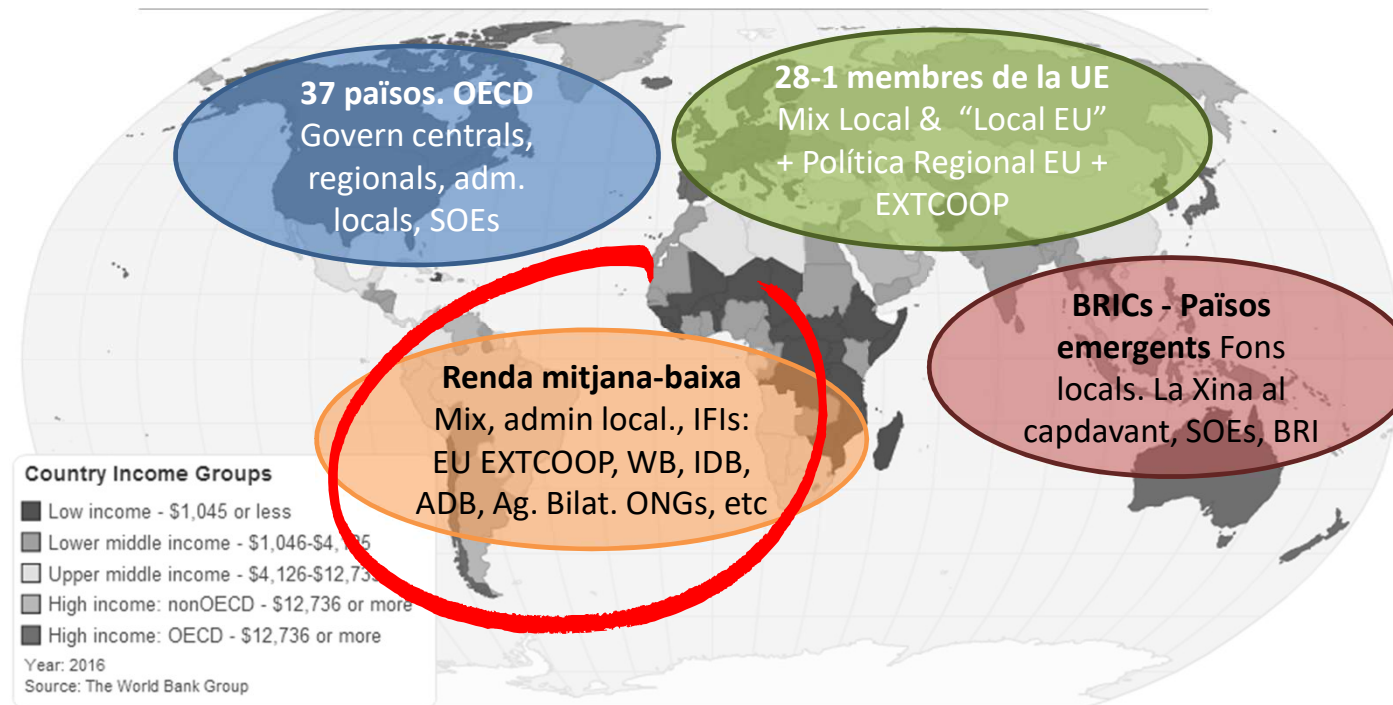
- **Management improvements**

We identify, select and customise the adequate management model for your business with your needs.

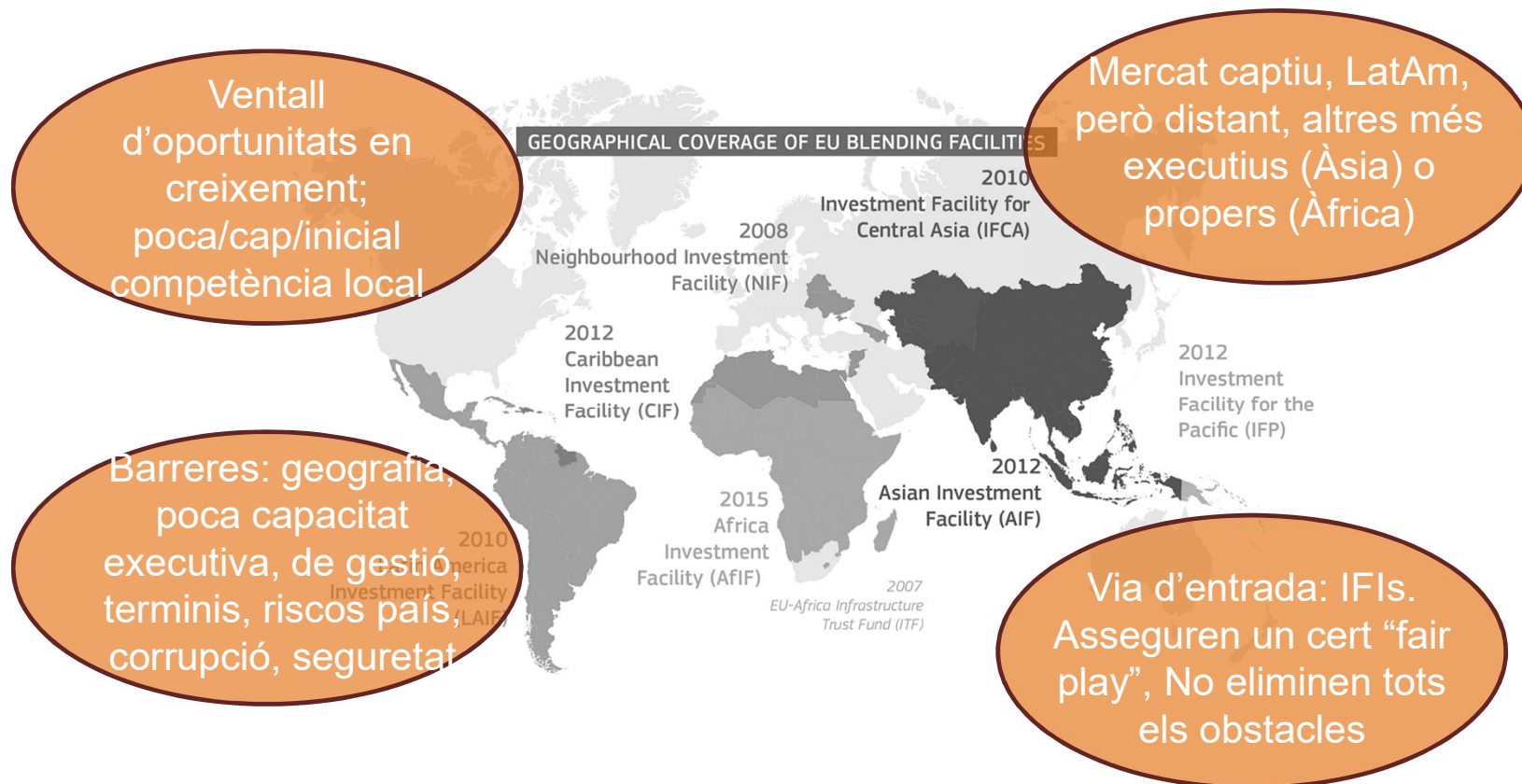
## Algunes consideracions respecte el context i la CPI

- La digitalització abaixa barreres, sobretot per les PIMEs, i n'augmenta la competència.
- El grau de digitalització depèn de cultures i desenvol. tecnològic: pe.a l'Àfrica el F2F segueix clau.
- Sotragada és gran, i més marcada per al 10% de l'economia: Turisme, Comerç, HORECA
- Concentració esforços en la Covid ha implicat alentiment processos de licitació, especialment locals
- Aspectes no menyspreables de networking s'han congelat, fires, conferències, reunions...
- Últimament s'esperen formats híbrids, amb el millor dels dos mons, idealment: digital i físic.
- Considerar el passaport biomètric, a venir, que facilitaria molt la recuperació transport aeri.
- Bussiness travels? Abans un 10% del total, ara es pronostica que passarien a representar 5-8%.
- A hores d'ara comerç int.de béns pràcticament ja recuperat...mentre que els serveis?
- La desescalada es comença a entreveure arreu del món, però desigual, capdavanters Israel, Chile.

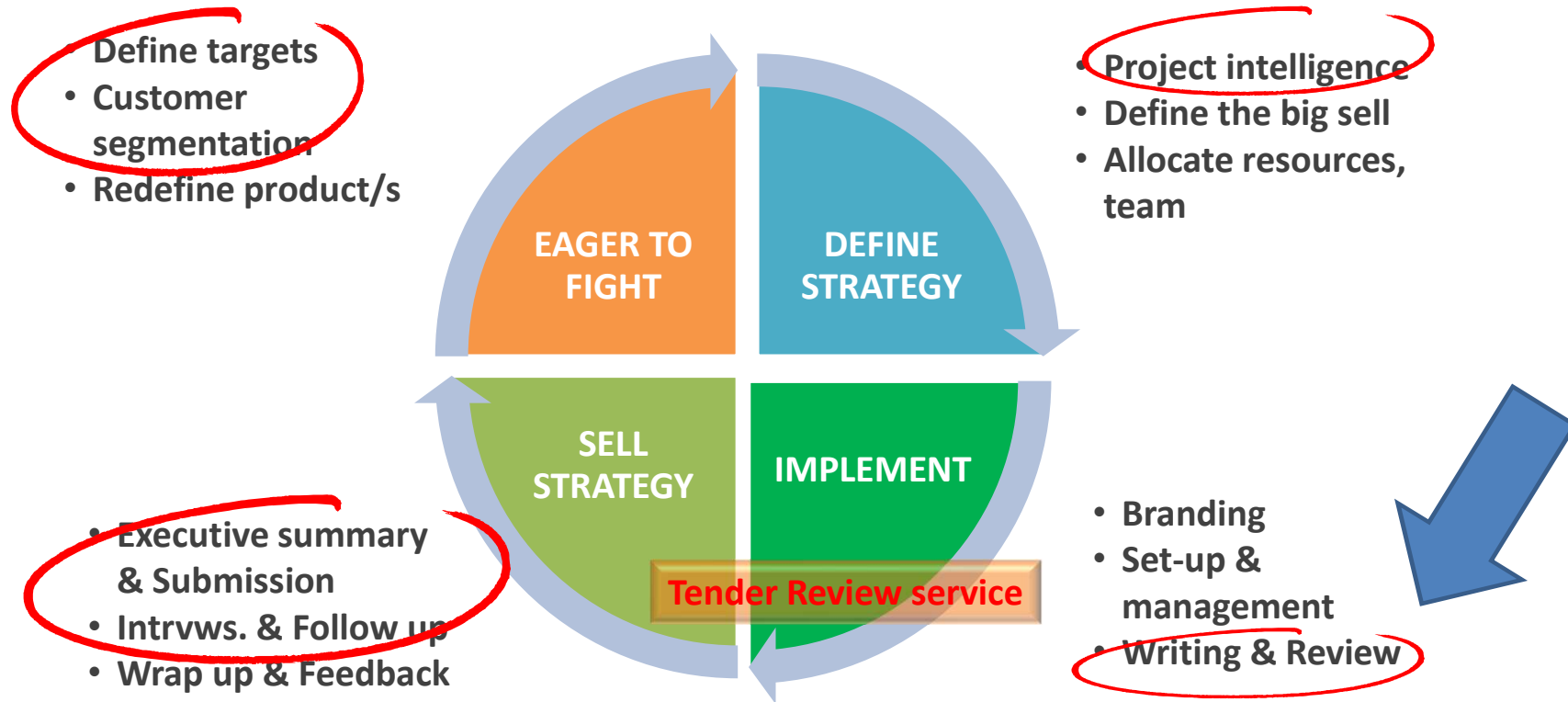
## Els diferents mercats de la CPI



## Mapatge CPI: Països tercers



# Masterplan de la CPI



Adapted from Bird & Bird (UK) Methodology



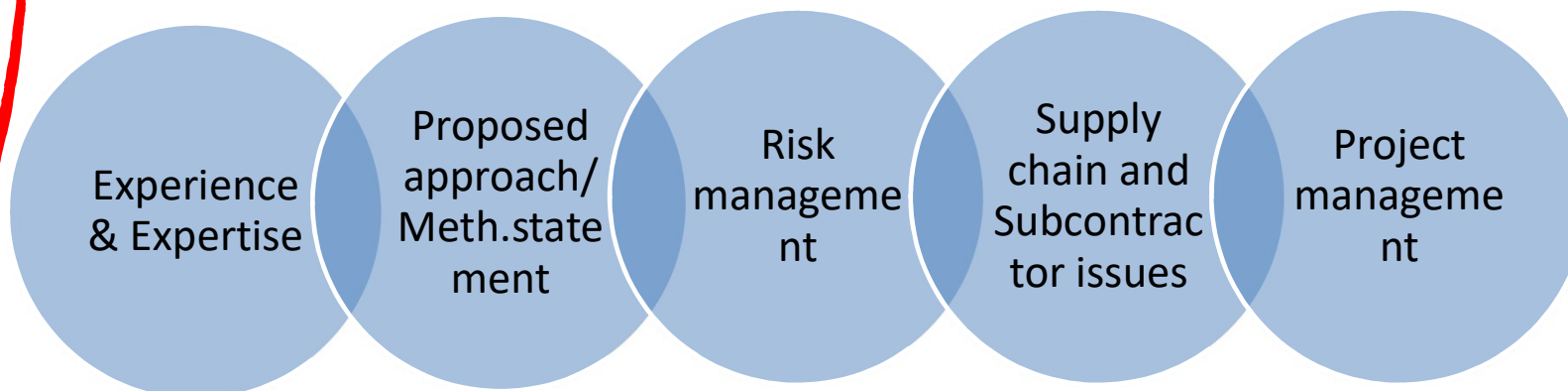
## The Tender Review Service

### Thorough Review to a un-awarded Technical Proposal...

*"It imparts an independent and impartial analysis... and the contents of this Review are provided in good faith and as a guide only."*

*"...is designed to provide a very good starting point to progress your tendering abilities. It must not be used to challenge the decisions of public procurers."*

*Servei gratuït;  
empreses/instit.  
que vulguin  
millorar ofertes i  
augmentar èxit en  
licitacions futures*



## Procediments per activar un TRS...

*Dos mesos, per  
analitzar proposta  
no guanyadora i  
determinar-ne els  
punts de millora*

- Reunió presencial o trucada per feedback ex-ante de l'empresa i comentar el TRS.

- Signatura PA CAPACITACIÓ TRS: gratuït, dos mesos
- Si es vol, signem un NDA

- Empresa envia oferta tècnica no guanyadora i docs rellevants: ToR, Feedback licitació, etc.

- Emailem resultats TRS, format Exec.summary : format breu, projectant millores a aplicar en futures OT.

- Presentació principals conclusions: reunió per comentar TRS i rebre feedback ex-post empresa.



## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70''	Marc de valoració d'una oferta tècnica – Part 1 Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 10'	<b>Pausa de descans</b> Vídeo ACCIÓ
10.40h 70'	<b>Marc de valoració d'una oferta tècnica – Part 2</b> Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	Fi de la sessió



# Objectius de la sessió

- 1 Tenir clares les **portes d'entrada (CPI- Contractes de serveis)**
- 2 **Entendre com pensen** les organitzacions internacionals quan avaluen ofertes tècniques (contractes de serveis)
- 3 **Sentir-vos més 'equipats'** a l'hora d'afrontar la propera licitació de serveis

# PART 1

---

## Marc de valoració d'una oferta tècnica

El context ampli (actors, com accedir a les licitacions)

Els contractes de serveis

El marc metodològic de referència en l'avaluació d'ofertes tècniques

Els criteris tècnics d'avaluació

# Avaluació d'ofertes per a qui? Els actors principals



# Com identifiquem les oportunitats

---

## Pàgines web de les organitzacions finançadores:

Per les United Nations: <https://www.ungm.org/>

Per institucions europees: <https://etendering.ted.europa.eu> (TED e-tendering)

Europeaid: <https://webgate.ec.europa.eu/europeaid/online-services/index.cfm?ADSSChck=1284977262222&do=publi.welcome&userlanguage=en>

[www.worldbank.org](http://www.worldbank.org) World Bank Group

[www.iadb.org](http://www.iadb.org) Web del IDB

[www.ebrd.org](http://www.ebrd.org) Web del EBRD

[www.adb.org](http://www.adb.org) Web del ADB

[www.afdb.org](http://www.afdb.org) Web del AfDB

[www.eib.org](http://www.eib.org) Web del EIB

[www.bcie.org](http://www.bcie.org) Web del Central American Bank for Economic Integration

[www.caribank.org](http://www.caribank.org) Web del Caribbean Development Bank

...

## Buscadors especialitzats

dgMarket : <http://www.dgmarket.com/>

Devex: <https://pages.devex.com/membership-and-services>

DevelopmentAid: <http://www.developmentaid.org/>

Development Business: [www.devbusiness.com](http://www.devbusiness.com)

WELCOME TO THE UNGM



Per les United Nations:  
<https://www.ungm.org/>



**My account**

Log in

**Call for tenders**

Search for calls for tenders

Search for a document

**What is TED eTendering?**

TED eTendering is an EU institutions' eProcurement platform based on EU Directives on public procurement. Allowing free electronic access to call for tenders' documents such as contractual documentation, technical specifications, annexes, questions and answers etc., TED eTendering effectively represents an added-value extension to TED (Tenders Electronic Daily), the online version of the "Supplement to the Official Journal of the European Union".

**How can I benefit from TED eTendering?**

TED eTendering provides free electronic access to calls for tenders published by EU institutions, agencies and other bodies. It is integrated and synchronized with TED eNotices and TED website, where public procurement notices are published.

TED eTendering users can benefit from the following services:

**Contracting Authorities**

- A collaborative eProcurement environment for preparing and publishing call for tenders' documentation
- Easy management of the preparation and publication of questions and answers
- Synchronization with the contract notice filled in on TED eNotices and published on TED website
- Automatic publication of the call for tenders on the same day as the contract notice
- Generation of reports, statistics on documents downloaded, subscribers etc.
- Possibility to publish calls for tenders for all types of procedures, even lower value procedures independently from TED website

**Economic Operators**

- Free electronic access, at any time, to all publicly available calls for tenders
- Easy download of documents in the available language versions
- Consultation of available questions and answers and possibility to ask new questions
- Electronic subscription to a call for tenders to be informed about updates by email
- Email alerts about new calls for tenders published

**Why should Economic Operators register on TED eTendering?**

**Help**

Help on this page

Per institucions europees:  
<https://etendering.ted.europa.eu>

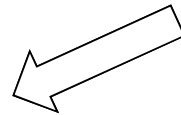
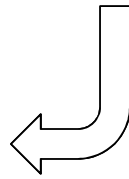
# Com identifiquem les oportunitats

Si voleu trobar **experts (especialistes)**

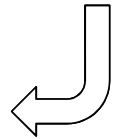
[www.assortis.com](http://www.assortis.com)

<http://www.expertaid.org/>

<http://www.devnetjobs.org/>



**O altres empreses** que ja treballin en licitacions de serveis



Contractes marc de la CE:

[https://ec.europa.eu/international-partnerships/framework-contracts\\_es](https://ec.europa.eu/international-partnerships/framework-contracts_es)

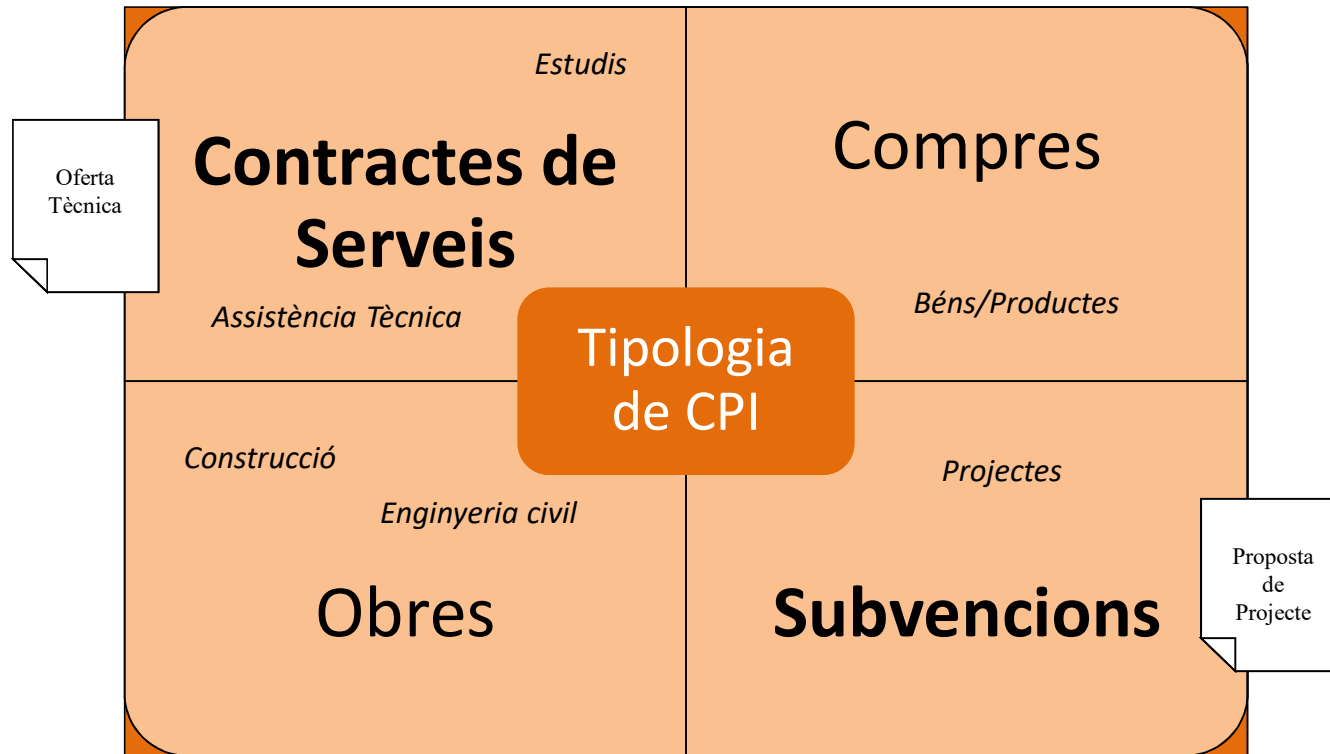
Empreses adjudicatàries de contractes amb NNUU:

<https://www.ungm.org/Public/ContractAward>



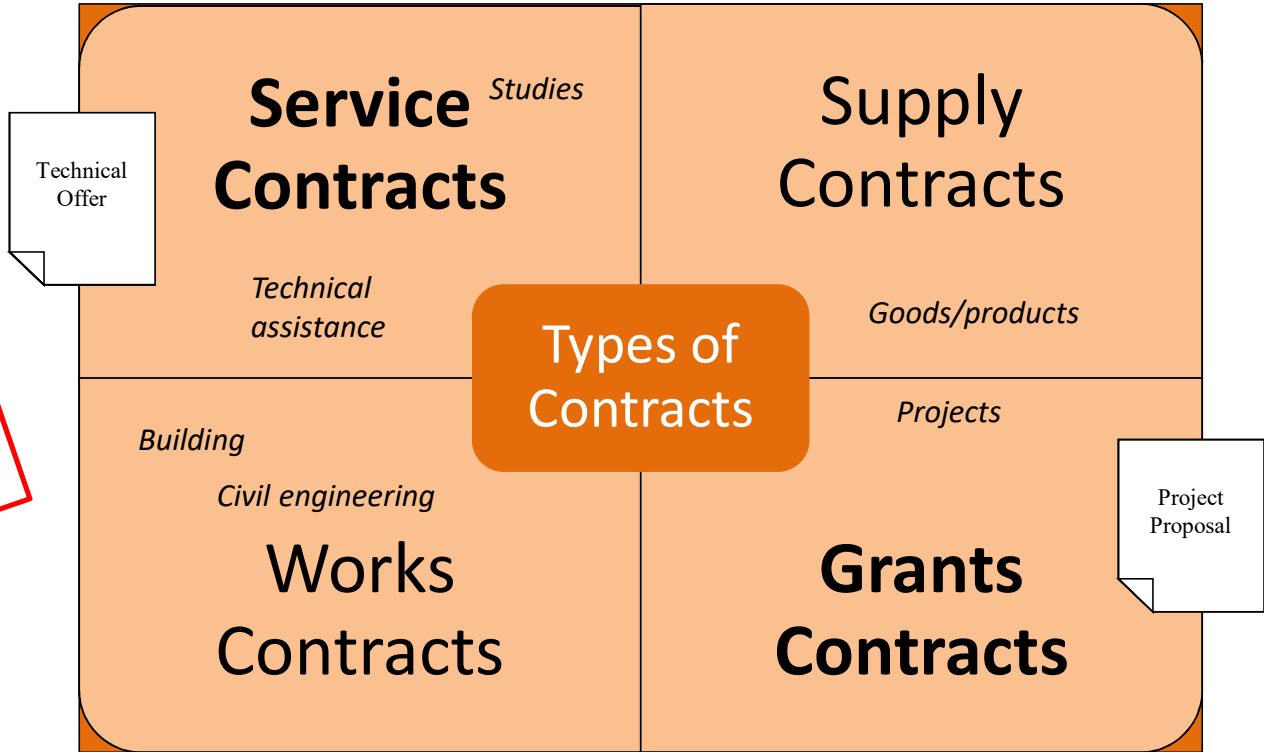
# TIPUS DE PROPOSTES I OFERTES

Avui ens centrem aquí



Compres de serveis, béns u obres **versus** subvencions

Terminologia en anglès



Purchase of services, supplies or works versus “giving money”

# Què tenen en comú totes aquestes organitzacions en quan a avaluació?



<http://www.oecd.org/development/evaluation/dacriteriaforevaluatingdevelopmentassistance.htm>



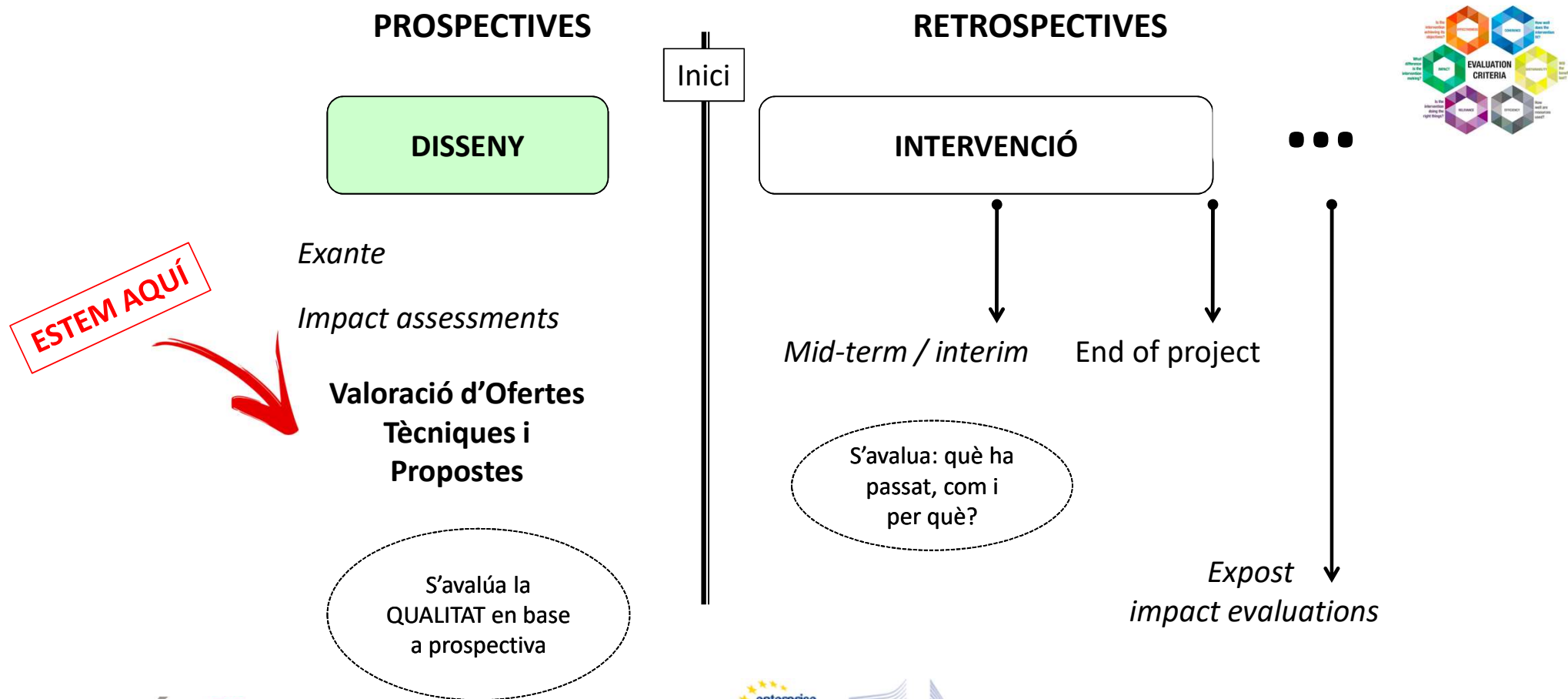
Logic Models



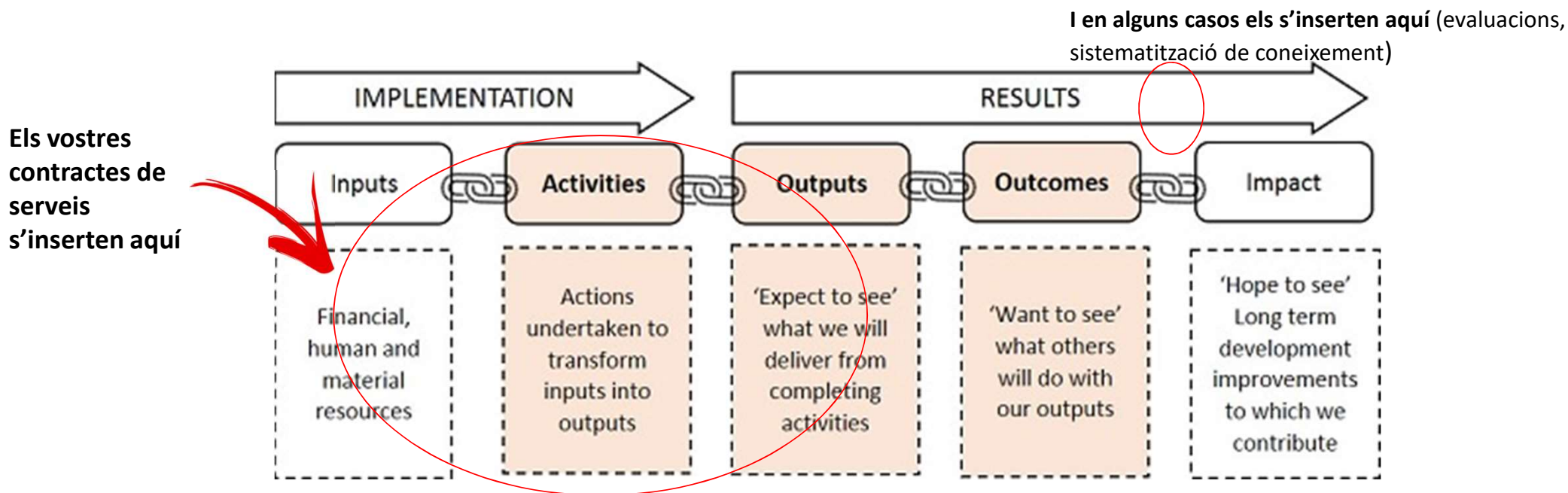
# Els criteris d'avaluació (OCDE)



# DE QUIN TIPUS D'AVALUACIONS PARLEM?



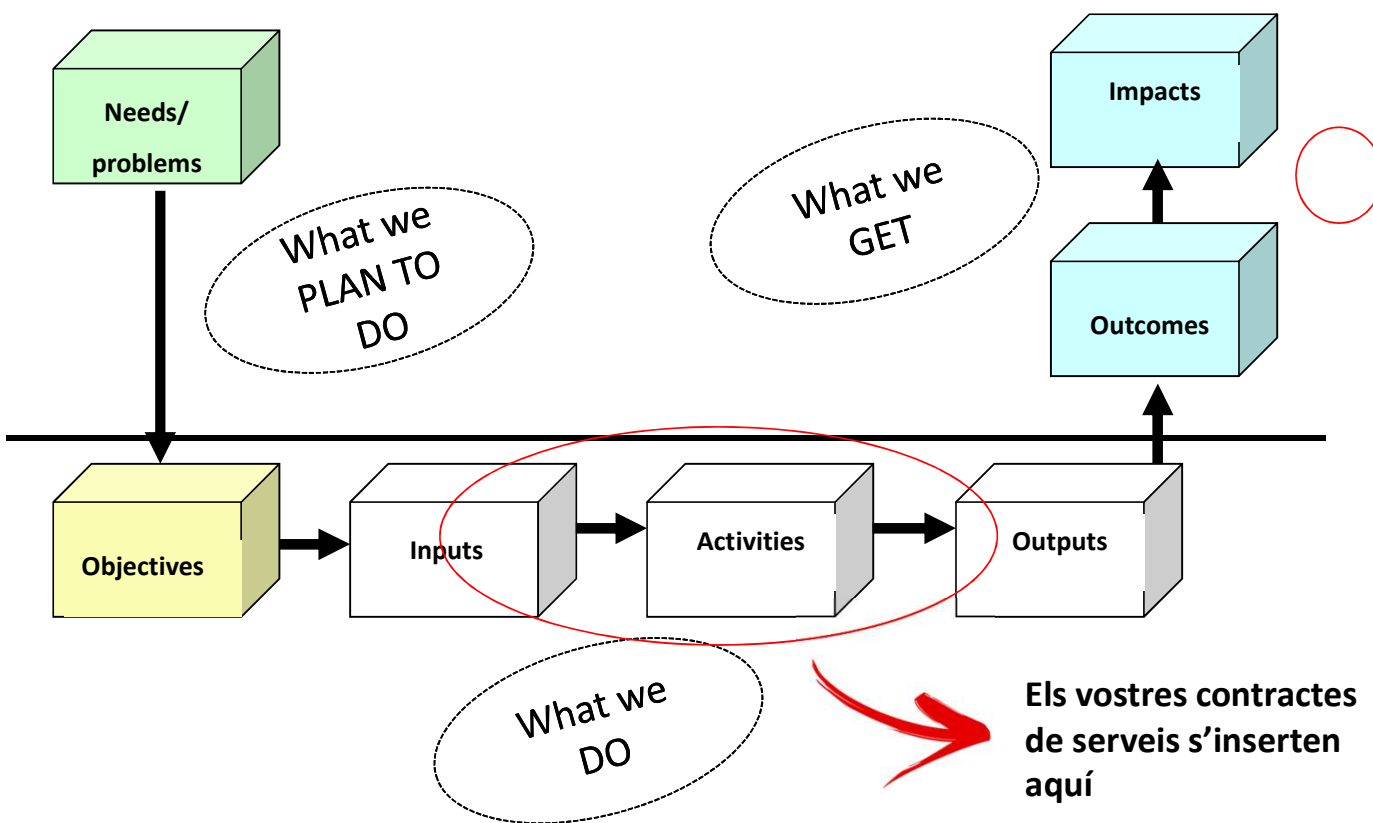
# La lògica d'intervenció / cadena de resultats (els *Logic models*)



Font: FAO, 2021

(<http://www.fao.org/capacity-development/resources/practical-tools/monitor-capacity-development/en/>)

# La lògica d'intervenció / cadena de resultats (els *Logic models*)

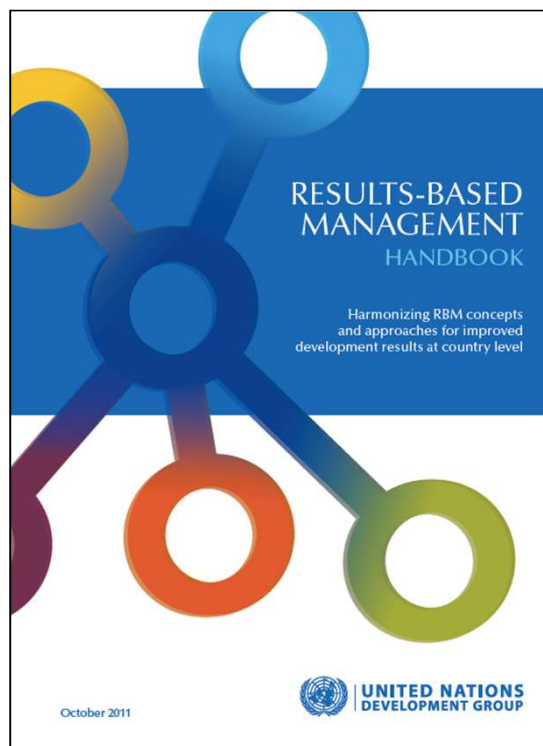


Els alguns casos els s'inserten aquí (evaluacions, sistematització de coneixement)

Font: Comissió Europea, 2017 (pàgina 347)  
(<https://ec.europa.eu/info/sites/info/files/better-regulation-toolbox.pdf>)

Els vostres contractes de serveis s'inserten aquí

# The vincle entre els projectes de Nacions Unides i els contractes de serveis



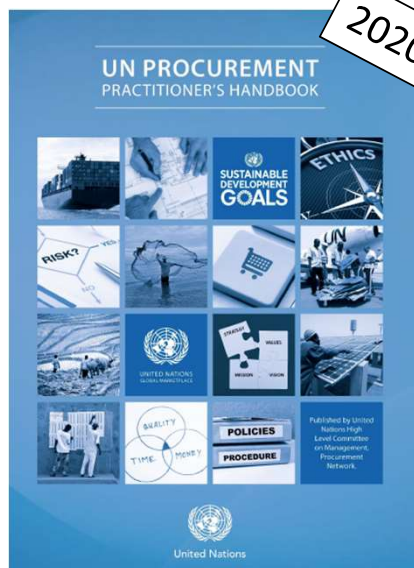
## La gestió per resultats

Inclou el marc conceptual i la terminologia bàsica sobre gestió per resultats, inclosa la terminologia bàsica lligada a l'avaluació

<https://unsdg.un.org/es/resources/manual-de-gestion-basada-en-resultados-del-gnud-unsdg>



# Manuels de referència per a la contractació pública internacional



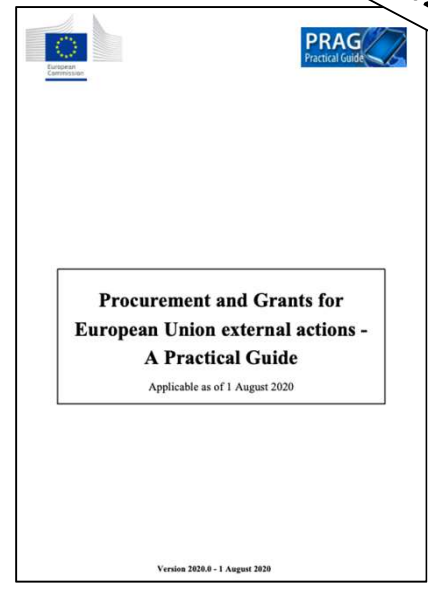
2020

“Evaluation of offers”

“Technical/ quality evaluation”

Varien una mica en funció de l'institució, però s'assemblen molt

<https://www.ungm.org/Shared/KnowledgeCenter/Pages/PPH2>



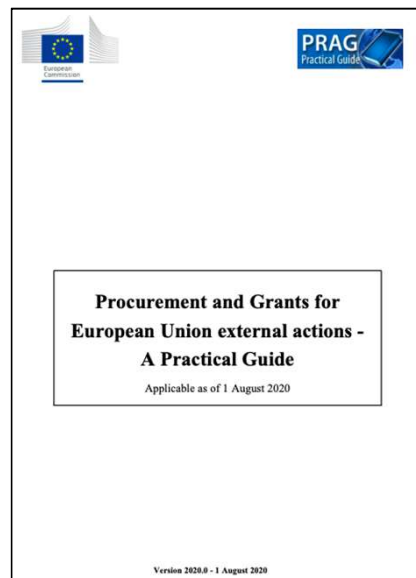
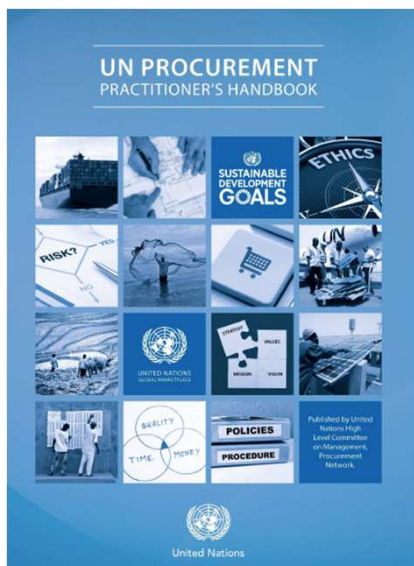
2020

“Technical evaluation”

“Award criteria”

<https://ec.europa.eu/europeaid/prag/>

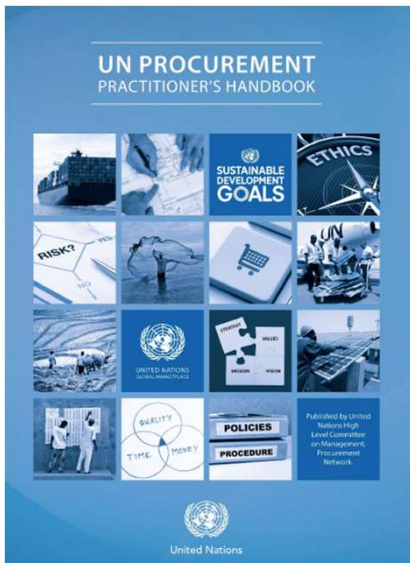
# Manuels de referència per a la contractació pública internacional



Tant un com l'altre diuen que “...the **tender dossier** must contain full details of the **technical evaluation grid** with its criteria and sub-criteria and their weighting” (PRAG 2020)

“The **evaluation criteria** and method must be provided in the **solicitation document** to enable bidders to understand what will be the focus of the evaluation...” (UN Procurement, 2020)

# Manuale de referència per a la contractació pública internacional



“Best **value** for money in the context of evaluation of offers, means that price alone is not always the only criterion factored into an evaluation method. Other criteria such as **quality**, availability, **sustainability**, time, compliance, risks, cost of maintenance and support, TCO, etc. are also part of the equation to determine the best **return** on investment of the procurement of goods, **services** or works” (Secció 6.4 Avaluació)

Recordeu?



# El procés de selecció i avaluació d'ofertes tècniques

Contractes de serveis

## Evaluation of Offers (Services)

### Selection criteria

Sufficient financial, economic,  
Technical and professional capacity  
to implement the tasks

On els trobem? A la *Contract Notice*  
L'avaluació es fa en base a la *Standard Application Form (B3)*

FIRM'S RELIABILITY



### Administrative compliance

(Administrative compliance grid)



### Award criteria

Technical criteria & Price of the tender  
Technical criteria:  
(Technical Evaluation Grid)

EXPERTISE  
METHODOLOGY & APPROACH  
UNDERSTANDING OF TORS  
EXPERTS / TEAM STRUCTURE



# Criteris tècnics d'avaluació per a contractes de serveis

**Expertise / experience** of the firm / organisation submitting the proposal (*expertesa i experiència de l'empresa*)

**Organization & methodology**  
(*organització i metodologia*)



ANNEX III: ORGANISATION & METHODOLOGY

To be completed by the tenderer

**Key experts & Team structure** (*experts clau i estructura de l'equip*)

**Understanding of the Terms of Reference** (*comprensió dels termes de referència*)



Taules de correlació  
(Experts-tasques; ToR  
- proposta)

## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70''	Marc de valoració d'una oferta tècnica – Part 1 Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 10'	Pausa de descans Vídeo ACCIÓ
10.40h 70'	<b>Marc de valoració d'una oferta tècnica – Part 2</b> Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	<b>Fi de la sessió</b>



## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70''	Marc de valoració d'una oferta tècnica – Part 1 Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 10'	Pausa de descans Vídeo ACCIÓ
10.40h 70'	Marc de valoració d'una oferta tècnica – Part 2 Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	Fi de la sessió



# PART 2

---

Marc de valoració d'una oferta tècnica

Exemples

Cas pràctic

Suggeriments pràctics





## ANNEX III: ORGANISATION & METHODOLOGY

To be completed by the tenderer

Please provide the following information:

### 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**.

I molt similar a



UNITED NATIONS

(Aneu a: <https://ec.europa.eu/europeaid/prag/document.do?isAnnexes=true> i baixeu-vos el document B8g de la llista)

↕ **Organization & methodology** (*organització i metodologia*)

↕ **Key experts & Team structure** (*experts clau i estructura de l'equip*)



**Taules de correlació**  
(Experts-tasques; ToR  
- proposta)

Guidance notes on expert inputs:

The tenderer is expected to take into account the implementation period of the contract and propose the number of expert days which will accomplish the tasks described in the Terms of Reference.

Implementation of the contract (and therefore payment) is based solely on the working days. The Contractor will only be paid for days actually worked on the basis of the daily fee rate contained in the budget breakdown (Annex V). Tenderers must annex the 'Estimated number of working days' worksheet contained in the spreadsheet for Annex V to the Organisation and Methodology to **demonstrate the correspondence between the proposed methodology and the expert inputs.** Please note that the budget breakdown should not be attached to the Organisation and Methodology as no financial offer should be disclosed in the technical offer.

**During the technical evaluation, assessment will be made if the number of working days estimated for each month for each type of expert proposed in the Organisation and Methodology are sufficient for the requirements of the Terms of Reference to be achieved.** This is judged on the basis of the profiles identified in the Terms of Reference and the Organisation and Methodology.

# 1. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica



## TABLE OF CONTENTS

<b>1</b>	<b>Information on tendering</b>	<b>4</b>
1.1	Participation	4
1.2	Contractual conditions	4
1.3	Joint tenders	4
1.4	Subcontracting	4
1.5	Content of the tender	4
1.6	Tender submission form - Identification of the tenderer: legal capacity and status (Part A of the Tender)	4
<b>2</b>	<b>Evaluation and award</b>	<b>5</b>
2.1	Award criteria	5
2.2	Technical offer	8
2.3	Financial offer	8
<b>3</b>	<b>Technical specifications</b>	<b>9</b>
3.1	General background	9
3.1.1	EuropeAid and the European Union (EU) Institutions	9
3.1.2	Mission and activities of EuropeAid	9
3.1.2.1	General mission of EuropeAid	9
3.1.2.2	Policy role and tasks of EuropeAid	10
3.1.2.3	Programming & Implementation	10
3.1.2.3.1	Description	10
3.1.2.3.2	Main financial instruments managed by EuropeAid	11
3.1.2.3.3	Budget of the Financial Instruments managed by EuropeAid	12
3.1.3	Organisation of EuropeAid	13

## 2 EVALUATION AND AWARD

### 2.1 Award criteria

The tender will be awarded according to the **best-value-for-money procedure**. The quality of the technical offer will be evaluated first based on the criteria listed in the table below. The maximum total quality score is 120 points. A minimum of 84 points (70%) out of 120 is needed in order for the technical offer to be considered of acceptable quality. Technical offers that do not reach this minimum quality threshold will be rejected and will not be ranked.



# 1. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

	Description	Points (and minimum threshold) <sup>1</sup>
<b>Part 1</b>	<b>Quality of the proposed methodology</b>	<b>60 (50%)</b>
	The purpose of criteria listed under Part 1 is to assess the quality of the methodology for the different phases of the project. By quality, it is meant whether the methodology for this phase/sub-phase: a- addresses adequately all elements of the Technical specifications related to this phase, b- ensures that the requested outputs (be it report, meeting...) are highly relevant to the general and specific objectives of the project c- ensures that the requested outputs are well-presented d- is well described and coherent These four aspects (a to d) will be assessed for each criterion of part 1.	
1.1	Phase 1: Inception phase	8
	The assessment of this criterion will be based on a description of the methodology for the inception phase, that should notably present: - the main steps - how EuropeAid stakeholders will be involved including the types and number of interviews/meetings to be conducted - nature of data collected and methods for data collection - expected outputs and their presentation	
1.2	Phase 2: Review of business and support processes	21
	The assessment of this criterion will be based on a description of each of the sub-phases of the Review of business and support processes: State of play, Analysis of the value added, and Analysis of the deficiency of the processes. The description should present the following elements: - the main steps of work, - how EuropeAid stakeholders will be involved including the types and number of interviews/meetings/workshops/missions/questionnaires to be conducted - type of analysis to be performed, nature of data collected and methods for data collection - expected outputs and their presentation	
1.3	Phase 3: Establishment of recommendations	21
	The assessment of this criterion will be based on a description of each of the following activity requested in this phase: - Establishing, selecting, presenting recommendations, measuring the efficiency gains expected from the implementation of the recommendations - Operationalizing recommendations and prioritizing recommendations - Presenting transferable best practices The description should present the following elements: - the main steps of work, - how EuropeAid stakeholders will be involved, including the types and number of interviews/meetings/missions to be conducted, and how, when and with whom workshops should be organized to help reach the objectives of this phase - the type of analysis to be performed, nature of data collected and methods for data collection - expected outputs and their presentation - for the description of the best practices part, the method to identify possible relevant	

	organisations (from which best practices can be transferred) should be presented	
1.4	Phase 4: Defining the coaching and change management strategy	10
	The assessment of this criterion will be based on a description of the methodology for the definition of a strategy of change management and of coaching to introduce and implement smoothly and successfully the reengineered processes, that should present: - the main steps and elements of such a strategy - how EuropeAid stakeholders will be involved in this phase, including the types and number of interviews/meetings that will be conducted and how, when and with whom workshops should be organized to help reach the objectives of this phase - the way this strategy will be presented in the report	
<b>Part 2</b>	<b>Organisation of the work</b>	<b>40 (50%)</b>
2.1	Work of the Team leader	5
	The assessment of this criteria will be based on: - a description of the roles and of the responsibilities of the team leader - on a description of the allocation of time of the team leader to the project and to each phase and outputs and the rationale behind the choice of this allocation - on the CV – to be submitted in the technical offer - of the team leader against the minimum profile requested	
2.2	Work of the Track leaders	10
	The assessment of this criteria will be based on: - a description of the roles and of the responsibilities of the track leaders - on a description of the allocation of time of the track leaders to the project and to each phase and outputs and the rationale behind the choice of this allocation - on the CVs – to be submitted in the technical offer - of the track leaders against the minimum profile requested	
2.3	Quality of the organisation of the work	25
	This criterion will assess the quality of the organisation of the work. In particular, it will assess: - whether the roles and responsibilities of the proposed team and if applicable of the economic operators (in case of joint tenders or subcontractors) are compatible with the technical specifications and will contribute to the achievement of the project's objectives - whether the global allocation of time and resources to the project and to each phase and outputs is adequate for the work and the rationale behind the choice of this allocation	
<b>Part 3</b>	<b>Quality control system applied to the service foreseen in the tender</b>	<b>20 (50%)</b>
	This criterion will assess the quality control system applied to the service foreseen in this project concerning the quality of the deliverables as defined in point 3.4.2 of the technical specifications, and continuity of the service in case of absence of the member/s of the team. The quality system should be specific to the project. A generic quality system will result in a low score. This criterion will be assessed on the basis of a description of the quality system.	
	<b>TOTAL</b>	<b>44</b> <b>120 (70%)</b>

## 2. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica



Education, Audiovisual and Culture Executive Agency  
Lifelong Learning Programme: Leonardo da Vinci, Grundtvig and Dissemination

OPEN CALL FOR TENDERS

Reference N° EACEA/2012/05

**EPALE – Electronic Platform for  
Adult Learning in Europe**

TENDERING SPECIFICATIONS

4. EVALUATION AND AWARD OF THE CONTRACT.....	31
4.1. Exclusion of tenderers.....	31
4.2. Selection of tenderers.....	33
4.2.1. Professional capacity.....	33
4.2.2. Economic and financial capacity.....	33
- 3 -	
4.2.3. Technical capacity.....	34
4.3. Evaluation of tenders.....	35
4.3.1. Technical evaluation.....	35
4.3.2. Financial evaluation.....	37

## 2. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

### 4.3. Evaluation of tenders

Tenders will be evaluated in relation to the criteria listed below.

The technical and financial evaluations will each be graded out of 100. The contract will be awarded to the tenderer whose offer represents the best value for money.

#### 4.3.1. Technical evaluation

Tenders will be evaluated on the basis of following two qualitative criteria:

1. The general quality, impact and creativity of the Tender and its relevance in relation to the objectives and results set out in these Tendering Specifications (60 points):

- understanding of the objectives of the contract and the work to be carried out (10 points);
- creativity of the proposed implementation of the contract (5 points);
- relevance and quality of the methodology proposed for the provision of the Central Support Service (CSS) for EPALE (20 points);
- relevance and quality of the methodology proposed for the provision of services for the support of the EU action in the field of Adult Education (25 points);

2. The quality and adequacy of the proposed technical and organisational arrangements, including the appropriateness of the staff to the tasks (40 points):

- quality and adequacy of the technical implementation proposed for the performance of the contract (20 points);
- appropriateness of the competences and of the organisation of the team executing the required tasks (20 points).

The first criterion will be assessed on the basis of:

- ✓ a methodology which the tenderer must provide, which will set out how the tenderer intends to achieve the objective and results set out in section 3, covering points such as: understanding of the purpose and nature of the tasks to be undertaken, time schedule, organisation of work, allocation of staff to different tasks, quality assurance framework, preliminary assessment of likely difficulties and likely results;
- ✓ a detailed explanation of the main features of the proposed web platform, possible future developments and of its planned architecture with an example of the proposed designs (a prototype);

- ✓ a description of the ways of making the proposed web services attractive to target audiences as well as the ways of increasing the number of visitors and their return rate;
- ✓ a methodology for content creation and management as well as for gathering relevant, accurate and timely information to be posted on the web-based-platform;
- ✓ a description of the resources and procedures for ensuring, through effective multilingualism and a high standard of editorial and linguistic quality of the portal, that all users from countries participating in the Lifelong Learning Programme and its successor will be able to exploit it;
- ✓ a communication and promotion strategy including a summary of activities designed to promote the EPALE platform;
- ✓ a description of how the tenderer will set up and operate the Central Support Service (CSS) – see section 3.3.1.2.;
- ✓ a description of how the tenderer envisages the role of the National Support Services (NSS) and how it intends to integrate and cooperate with NSS.– see section 3.3.1.7;
- ✓ a description of how the tenderer intends to manage and animate online communities providing the relevant stakeholders with opportunities to interact in such communities.

The second criterion will be assessed on the basis of:

- ✓ a description of the organisation and the methodology proposed for the users support service;
- ✓ a description of the technical implementation proposed for an ease of use and accessible web-based platform and a detailed explanation of the main features of the proposed web platform and portals and of their planned architecture with an example of the proposed design (a prototype);
- ✓ a description of how the tenderer intends to comply with the Multi-Site Drupal7 Platform at DIGIT and the Multisite Service Level Agreement between the Directorates-General or Services using the Multisite Service and the Directorate-General for Informatics (DIGIT);
- ✓ a detailed description of the security, data protection and intellectual property rights measures proposed;
- ✓ a description of the organisation of the work including the specifications of the tasks to be performed by each member of the staff.

Offers which score a total of fewer than 65 points for the qualitative criteria will be rejected. In addition, any offer which scores below 50% of the maximum number of points available for any one criterion will be rejected.



### 3. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

#### Annex SER 5: Evaluation Grid for Negotiated procedure for Consultancy Firms.

Requests for Proposals - references:  
 Closing Date for submission of proposals:  
 Number of proposals received:

Date of evaluation:

For negotiated procedure. The below grid can be applied as an internal tool to assist the Procurement Committee in making the overall decision.

Utilitzat per DANIDA (cooperació Danesa)

#### 2. Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Maximum Points Obtainable	Consultant				
			A	B	C	D	E
1.	Expertise of Firm / Organisation / Tenderer submitting Proposal	<40>					
2.	Proposed Organisation and Methodology	<40>					
3.	Personnel	<20>					
<b>Total</b>		<b>100</b>					

(Note: the score weight should be adjusted to the specific project)

Evaluation forms for technical proposals appear below. The maximum obtainable number of points specified for each evaluation criterion indicates the relative significance or weight of the item in the overall evaluation process. The Technical Proposal Evaluation Forms are:

Form 1: Expertise of Firm / Organisation Submitting Proposal

Form 2: Proposed Organisation and Methodology

Form 3: Personnel

Technical Proposal Evaluation Form 1		Maximum Points	Consultant				
			A	B	C	D	E
<b>Expertise of firm / organisation submitting proposal</b>							
1.1	Organisation and Staff (Competence / Reliability)	<insert no>					
1.2	General Organisational Capability which is likely to affect implementation	<insert no>					
1.3	Extent to which any service would be subcontracted	<insert no>					
1.4	Quality assurance procedures	<insert no>					
1.5	Relevance of: - Specialised Knowledge - Experience on Similar Programme / Projects - Experience on Projects in the Region Work for DANIDA / major multilateral/ or bilateral programmes	<insert no>					
		<b>40</b>					

(Note: should be adjusted to the specific project)



### 3. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

Technical Proposal Evaluation Form 2		Maximum Points	Company / Other Entity						
			A	B	C	D	E		
<b>Proposed Organisation and Methodology</b>									
2.1	To what degree does the Tender show understanding of the task?	<insert no>							
2.2	Have the important aspects of the task been addressed in sufficient detail?	<insert no>							
2.3	Are the different components of the project adequately weighted relatively to one another?	<insert no>							
2.4	Is the proposal based on a survey of the project environment and was this data input properly used in the preparation of the proposal?	<insert no>							
2.5	Is the conceptual framework adopted appropriate for the task?	<insert no>							
2.6	Is the scope of task well defined and does it correspond to the TOR?	<insert no>							
2.7	Is the presentation clear and is the sequence of activities and the planning logical, realistic and promising efficient implementation to the project?	<insert no>							
		<b>40</b>							


(Note: should be adjusted to the specific project)

Key experts Form 3		Maximum Points	Firm/organisation					
			A	B	C	D	E	
Key expert 1								
3.1	General qualifications and skills	<insert no>						
3.2	International experience	<insert no>						
3.3	Experience in the region/country (knowledge of local language, culture, administrative system, government, etc.)	<insert no>						
	Adequacy for the assignment (education, training and experience in the specific sector, field and subject, relevant to the particular assignment)	<insert no>						
3.3	Language proficiency	<insert no>						
	Key expert 2 (same evaluation)							
Sub-total Form 3		<b>20</b>						

(Note: should be adjusted to the specific project)

## 4. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

United Nations Development Programme



Empowered lives.  
Resilient nations.

### REQUEST FOR PROPOSAL

#### DESIGN, MANUFACTURE AND ERECTION OF A STEEL STRUCTURE

RFP No.: RFP-ZIM-GF-072- MUTARE WAREHOUSE STEEL STRUCTURE  
 READVERTISED  
 Project: GLOBAL FUND  
 Country: ZIMBABWE

Issued on: 17 November 2020

21	39	Type of Contract	Purchase Order and Contract for Goods and Services for UNDP  <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>
22	39	UNDP Contract Terms and Conditions that will apply	UNDP General Terms and Conditions for Mixed Goods and Services  <a href="http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html">http://www.undp.org/content/undp/en/home/procurement/business/how-we-buy.html</a>

20

## 4. Exemple de graella d'avaluació (*evaluation grids*) d'una oferta tècnica

### Technical Evaluation Criteria

Summary of Technical Proposal Evaluation Forms		Points Obtainable
1.	Bidder's qualification, capacity and experience	300
2.	Proposed Methodology, Approach and Implementation Plan	400
3.	Management Structure and Key Personnel	300
<b>Total</b>		<b>1000</b>

Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	Reputation of Organization and Staff Credibility / Reliability / Industry Standing	50
1.2	General Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, extent to which any work would be subcontracted	90
1.3	Relevance of specialized knowledge and experience on similar engagements done in the region/country	70
1.4	Quality assurance procedures and risk mitigation measures	60
1.5	Organizational Commitment to Sustainability (mandatory weight) -Organization is compliant with ISO 14001 or ISO 14064 or equivalent – 20 points -Organization is a member of the UN Global Compact -5 points -Organization demonstrates significant commitment to sustainability through some other means- 5 points, for example internal company policy documents on women empowerment, renewable energies or membership of trade institutions promoting such issues	30
<b>Total Section 1</b>		<b>300</b>

Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	80
2.2	Description of the Offeror's approach and methodology for meeting or exceeding the requirements of the Terms of Reference	100
2.3	Details on how the different service elements shall be organized, controlled and delivered	50
2.4	Description of available performance monitoring and evaluation mechanisms and tools; how they shall be adopted and used for a specific requirement	50
2.5	Assessment of the implementation plan proposed including whether the activities are properly sequenced and if these are logical and realistic	70
2.6	Demonstration of ability to plan, integrate and effectively implement sustainability	50

25

	measures in the execution of the contract as per standards set out in Section 1.3, 1.4 and 1.5	
<b>Total Section 2</b>		<b>400</b>

Section 3. Management Structure and Key Personnel		Points obtainable
3.1	Composition and structure of the team proposed. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services?	60
3.2	Qualifications of key personnel proposed	
3.2 a	Team Leader	115
	- General Experience	30
	- Specific Experience relevant to the assignment	50
	- Regional/International experience	30
	- Language Qualifications	5
3.2 b	Senior in-house Engineer for Design Coordination	85
	- General Experience	15
	- Specific Experience relevant to the assignment	40
	- Regional/International experience	20
	- Language Qualifications	10
3.2 c	Site Supervisor for Erection	40
	- General Experience	5
	- Specific Experience relevant to the assignment	15
	- Regional/International experience	10
	- Language Qualifications	10
<b>Total Section 3</b>		<b>300</b>

l'empresa del demà  
accio.gencat.cat

## CAS PRÀCTIC

---

Anàlisi dels efectes del suport de UNFPA a la ronda de Censos de població i vivenda (contracte de serveis)



Criteris i valoracions de guanyadors i perdedors



## Suggeriments

Transformar els criteris d'avaluació/adjudicació en una **llista de comprovació** (*Award Criteria / Evaluation Grid* → *Checklist*)

Utilitzar la **terminologia** de les graelles d'avaluació

Fer **quadres de correlació** (per experts clau, per demostrar comprensió dels termes de referència)

**Fer d'avaluadors**: apliqueu els criteris tècnics d'avaluació a l'oferta tècnica

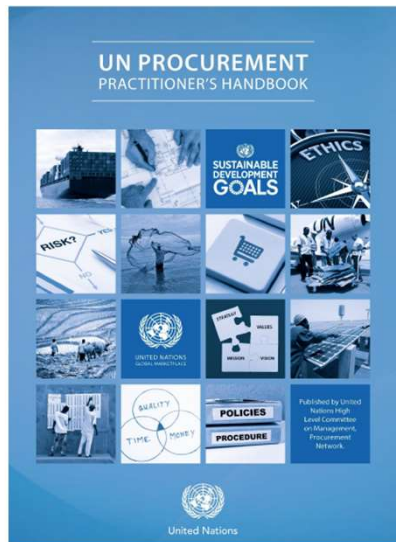
Emprar la terminologia de la **lògica d'intervenció**; fer ús de models lògics – en diagrames de fluxe - que demostrin la nostra comprensió de la intervenció i sobretot, de **la vostra contribució** (serveis)



**Horizon scanning /  
environmental scanning**  
(per valor afegit,  
pertinència,  
sostenibilitat/riscos)



# I per als que voleu treballar amb Nacions Unides: penseu en els factors de sostenibilitat



## Chapter 14 Sustainable Procurement

This chapter covers the following topics:

14.1	Sustainable Procurement	179
14.2	United Nation Global Compact	202

suppliers. Based on the methodology a tender is defined as sustainable when:

1. At least 3 criteria /indicators are integrated in the tender.
2. The integrated consideration corresponds to at least one criterion in each of the three pillars of sustainability (Environmental, Social, Economic). In other words, when SP consideration included in a tender cover all three pillars of sustainability.

Environmental Indicators	1	The tender incorporates considerations for the prevention of polluting emissions to air, solid waste to land and discharges to water (e.g. EMS, waste and waste management etc.)	Prevention of pollution
	2	The tender incorporates considerations promoting the sustainable use of resources (e.g. energy saving, recycling etc.)	Sustainable resource use
	3	The tender incorporates considerations for preventing or minimizing damage associated with climate change (e.g. energy efficiency, greenhouse gas reporting and offsetting, etc.)	Climate change mitigation and adaptation
	4	The tender incorporates considerations related to the protection of the environment, biodiversity and restoration of natural habitats (e.g. sustainable/organic agriculture, fishing or forestry, etc.)	Protection of the environment, biodiversity and restoration of natural habitats
Social Indicators	5	The tender incorporates considerations related to human rights and the fundamental principles and rights at work (e.g. freedom of association/collective bargaining, elimination of child/forced labour and discrimination at work, health and safety, fairly traded goods, etc.)	Human rights and labour issues
	6	The tender incorporates considerations addressing gender equality and women's empowerment (e.g. gender mainstreaming, women-owned businesses, etc.)?	Gender issues
	7	The tender incorporates considerations promoting health and general well-being of consumers/recipients of the good/service (e.g. hazardous chemicals, labelling of chemicals, etc.)?	Social health and well-being
Economic Indicators	8	The tender incorporates considerations of the whole life cycle cost of the service or product you are purchasing?	Whole life cycle cost
	9	The tender incorporates considerations for local SMEs, local communities or/and disadvantaged groups (e.g. reserved labour, local materials)?	Local communities and SMEs
	10	The tender incorporates considerations promoting sustainability through the entire supply chain (e.g. sustainability of tier 2 suppliers)?	Promoting sustainability throughout the supply chain
General Indicators	11	The tender incorporates considerations promoting vendors' participation to the UN Global Compact	Global compact
	12	The tender incorporates contract conditions/KPIs that stipulate verification of suppliers' environmental and social claims through "spot checks" and audit provisions	Suppliers' monitoring and auditing

## OFERTES TÈCNIQUES GUANYADORES 09/MAR/2021

09:00h 15'	Presentació Oficina tècnica CP, Activitats i Perspectiva Victor Mercè <a href="mailto:vmerce@gencat.cat">vmerce@gencat.cat</a> Oriol Martínez <a href="mailto:omartinez@catalonia.com">omartinez@catalonia.com</a> ACCIÓ CPI
09:15h 70''	Marc de valoració d'una oferta tècnica – Part 1 Marcs de referència; Els criteris tècnics d'avaluació; Els contractes de serveis (centrat en licitacions de serveis) Jordi del Bas <a href="mailto:jdelbas@eada.edu">jdelbas@eada.edu</a> , Consultor
10:25h 10'	Pausa de descans Vídeo ACCIÓ
10.40h 70'	Marc de valoració d'una oferta tècnica – Part 2 Casos pràctics i recomanacions (centrat en licitacions de serveis) Jordi del Bas
11:50h	Fi de la sessió





# Moltes gràcies

## CONSULTOR

Jordi del Bas - [idelbas@eada.edu](mailto:idelbas@eada.edu)

## ACCIÓ Barcelona

Victor Mercè - [vmerce@gencat.cat](mailto:vmerce@gencat.cat)

Oriol Martínez – [omartinez@catalonia.com](mailto:omartinez@catalonia.com)



**Servei d'Informació  
Empresarial**

934 767 206  
info.accio@gencat.cat



@accio\_cat

**Alt Penedès, Garraf i Maresme**

Tel. 934 767 251  
altpenedesgarrafmaresme.accio@gencat.cat

**Catalunya Central**

Tel. 936 930 209  
manresa.accio@gencat.cat

**Lleida**

Tel. 973 243 355  
lleida.accio@gencat.cat

**Terres de l'Ebre**

Tel. 977 495 400  
terresebre.accio@gencat.cat

**Alt Pirineu i Aran**

Tel. 973 355 552  
altpirineuaran.accio@gencat.cat

**Girona**

Tel. 872 975 991  
girona.accio@gencat.cat

**Tarragona**

Tel. 977 251 717  
tarragona.accio@gencat.cat

**ACCIÓ al Món**

Accra / Amsterdam / Austin / Berlín / Bogotà / Bombai / Brussel·les / Buenos Aires / Casablanca / Ciutat de Mèxic / Copenhaguen / Dubai / Hong Kong / Istanbul / Johannesburg / Lima / Londres / Miami / Milà / Montreal / Moscou / Nairobi / Nova Delhi / Nova York / Panamà / París / Pequín / Santiago de Xile / Sao Paulo / Seül / Silicon Valley / Singapur / Sydney / Stuttgart / Tel Aviv / Tòquio / Varsòvia / Washington DC / Xangai / Zagreb

**ACCIÓ**



Fem avui l'**empresa** del demà  
56 [accio.gencat.cat](http://accio.gencat.cat)