

**Luxembourg-Luxembourg: Provision of Financial, Business and Management Consultancy and Co-sourcing Services to the EIF**

OJ S 150/2022 05/08/2022

Contract notice

Services

**Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: European Investment Fund

Postal address: 37B, avenue J.F. Kennedy

Town: Luxembourg

NUTS code: LU00 Luxembourg

Postal code: L-2968

Country: Luxembourg

Contact person: SPA-Procurement

E-mail: [eif-procurement@eif.org](mailto:eif-procurement@eif.org)**Internet address(es):**Main address: <https://www.eif.org/>Address of the buyer profile: [https://www.eif.org/who\\_we\\_are/governance/procurement/index.htm](https://www.eif.org/who_we_are/governance/procurement/index.htm)**I.3. Communication**The procurement documents are available for unrestricted and full direct access, free of charge, at: <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=11836>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=11836>**I.4. Type of the contracting authority**

European institution/agency or international organisation

**I.5. Main activity**

General public services

**Section II: Object**

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**II.1. Scope of the procurement****II.1.1. Title**

Provision of Financial, Business and Management Consultancy and Co-sourcing Services to the EIF

Reference number: 2022-CE-SPA-001

**II.1.2. Main CPV code**

79412000 Financial management consultancy services

**II.1.3.**

## **Type of contract**

Services

### **II.1.4. Short description**

The scope of this procurement procedure is the provision of consultancy and co-sourcing services to support the EIF in various business areas and activities. The EIF will conclude a framework agreement with multiple service providers. The framework agreements will cover twelve (12) Domains organized into two (2) Lots (lot 1 - Financial Services and lot 2 - Business and Management Services).

### **II.1.5. Estimated total value**

Value excluding VAT: 40 000 000,00 EUR

### **II.1.6. Information about lots**

This contract is divided into lots: yes

Tenders may be submitted for maximum number of lots: 2

## **II.2. Description**

### **II.2.1. Title**

Financial services

Lot No: 1

### **II.2.2. Additional CPV code(s)**

79412000 Financial management consultancy services

### **II.2.3. Place of performance**

NUTS code: LU000 Luxembourg

Main site or place of performance: The services will be provided either on-site at the Fund's premises or from the usual professional premises of the service provider. This aspect will be further specified in each individual assignment.

### **II.2.4. Description of the procurement**

This lot is split in the following six (6) domains (further described in Section 4.1 of Annex 4):

- 1) investment products, portfolio and liquidity management,
- 2) best banking practices / best market practices as well as internal controls and processes, including regulatory assessment,
- 3) pricing, valuation.
- 4) accounting services,
- 5) risk management and related reporting,
- 6) financial planning and analysis.

Tenderers may respond to one or multiple lots and to a single or multiple domains within the lots.

### **II.2.5. Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

### **II.2.6. Estimated value**

Value excluding VAT: 20 000 000,00 EUR

### **II.2.7. Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months: 24

This contract is subject to renewal: yes

Description of renewals:

The framework agreement will be signed for an initial period of two years with the possibility to be extended thereafter for two consecutive one-year periods, upon the EIF's discretion (2 + 1 + 1).

#### **II.2.10. Information about variants**

Variants will be accepted: no

#### **II.2.11. Information about options**

Options: no

#### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

#### **II.2.14. Additional information**

### **II.2. Description**

#### **II.2.1. Title**

Business and Management Services

Lot No: 2

#### **II.2.2. Additional CPV code(s)**

79410000 Business and management consultancy services

#### **II.2.3. Place of performance**

NUTS code: LU000 Luxembourg

Main site or place of performance: The services will be provided either on-site at the Fund's premises or from the usual professional premises of the service provider. This aspect will be further specified in each individual assignment.

#### **II.2.4. Description of the procurement**

This lot is split in the following six (6) domains (further described in Section 4.1 of Annex 4):

- 1) general management and strategy,
- 2) process, project and change management,
- 3) back and middle office services,
- 4) human Resources management and actuary services,
- 5) coaching/training,
- 6) marketing and communication strategy.

Tenderers may respond to one or multiple Lots and to a single or multiple Domains within the Lots.

#### **II.2.5. Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6. Estimated value**

Value excluding VAT: 20 000 000,00 EUR

#### **II.2.7. Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months: 24

This contract is subject to renewal: yes

Description of renewals:

The framework agreement will be signed for an initial period of two years with the possibility to be extended thereafter for two consecutive one-year periods, upon the EIF's discretion (2 + 1 + 1).

#### **II.2.10. Information about variants**

Variants will be accepted: no

#### **II.2.11. Information about options**

Options: no

#### **II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds: no

#### **II.2.14. Additional information**

### **Section III: Legal, economic, financial and technical information**

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#### **III.1. Conditions for participation**

##### **III.1.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions:

As stated in the procurement documents

##### **III.1.2. Economic and financial standing**

Selection criteria as stated in the procurement documents

##### **III.1.3. Technical and professional ability**

Selection criteria as stated in the procurement documents

#### **III.2. Conditions related to the contract**

##### **III.2.2. Contract performance conditions**

For each domain, the EIF will sign a framework agreement with multiple service providers (max six (6) provided that a sufficient number of admissible tenders have been received) using the cascading mechanism, for assignments with an estimated value up to EUR 100 000 and the re-opening of competition for assignments with an estimated value above EUR 100 000 (both mechanisms are described under Section 6.4 of Annex 4). The Framework Agreement is subject to the EIF General Terms and Conditions (Annex 7). Additional or different terms and conditions shall not apply.

##### **III.2.3. Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

### **Section IV: Procedure**

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#### **IV.1. Description**

##### **IV.1.1. Type of procedure**

Open procedure

##### **IV.1.3. Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement  
Framework agreement with several operators

**IV.1.8. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: no

**IV.2. Administrative information**

**IV.2.2. Time limit for receipt of tenders or requests to participate**

Date: 26/09/2022 Local time: 14:00

**IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

**IV.2.4. Languages in which tenders or requests to participate may be submitted**

English

**IV.2.6. Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 6 (from the date stated for receipt of tender)

**IV.2.7. Conditions for opening of tenders**

Date: 27/09/2022 Local time: 14:00

Place:

Electronically, via e-Submission.

**Section VI: Complementary information**

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**VI.1. Information about recurrence**

This is a recurrent procurement: no

**VI.3. Additional information**

**VI.4. Procedures for review**

**VI.4.1. Review body**

Official name: General Court of the European Union

Postal address: rue du Fort Niedergrünwald

Town: Luxembourg

Postal code: L-2925

Country: Luxembourg

Telephone: +352 43031

Fax: +352 4303-2100

Internet address: <https://curia.europa.eu>

**VI.5. Date of dispatch of this notice**

29/07/2022