

GGF Technical Assistance Facility

PROCUREMENT PROCEDURES

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Acronyms

GGF	Green for Growth Fund
TA	Technical Assistance
GGF TAF	GGF Technical Assistance Facility
TAC	GGF Technical Assistance Committee
TAF Manager	Finance in Motion GmbH on behalf of the Technical Assistance Facility
RFP	Request for Proposals
TOR	Terms of Reference
EOI	Expression of Interest
LOI	Letter of Invitation

1. Introduction

This document aims to clearly explain the procurement procedures governing all Technical Assistance (TA) projects funded under the GGF Technical Assistance Facility (GGF TAF). It is based on the Policy & Procedures endorsed by the GGF Technical Assistance Facility Committee (TAC) and is in line with best practices.

Below is an overview of the procurement procedures based on project size, outlining the selection process for bidders/service providers, the procurement methods and the evaluation grid.

These general guidelines are intended to accompany the relevant Request for Proposals (RFP) or Letter of Invitation (LOI) for the specific project, which bidders will receive via e-mail. The RFP will include:

- Conditions of tender and conditions of contract
- Terms of Reference (TOR)
- Deadline for submission and for requests for clarification
- Format requirements
- Declaration form for bidder, in which they confirm the acceptance of provisions with respect to human rights, applicable environmental legislation including multilateral environmental agreements, as well as internationally agreed core labour standards as well as conflict of interest as set out in the GGF TAF General Terms and Conditions.

For all projects, bidders can download the CV template, the Counterparty Information Sheet template and Budget template available on [Fund's website](#) .

2. Guiding Principles

In the management of procurement process, the GGF TAF operates in line with the following principles:

Competition

Procurement processes are carried out with an emphasis on competitive bidding. In tender processes, the GGF TAF seeks to conduct procurement with the maximum number of potential applicants/bidders.

Fairness

Potential Applicants/Bidders are to be given equal opportunity to participate in a tender process. Unequal treatment of (potential) applicants/bidders must be prevented.

Transparency

The tender process is thoroughly documented. Such information will be made available to all parties involved in accordance with their respective right to information.

Confidentiality

All procurement-related information is confidential. Only the parties involved shall have access to the relevant information in accordance with their respective right to information.

Economic Efficiency and Sustainability

In the interest of an efficient use of funds, the aim of procurement processes is to award contracts to bidders with the best cost-performance-ratio. The tender process will take into account criteria that reflect not only the price, but also the quality of the offer.

Proportionality

The basic principles set out above must be applied appropriately, taking into consideration all relevant circumstances and the balance of interests during the respective tender process. Additionally, the TAF believes strongly in the value of diversity and thus strongly encourages female candidates to participate. Furthermore, gender balance in a bidder's team will be a strong advantage for the selection as well as a criteria for the evaluation, as specified in section 6 (Tender Evaluation).

3. Procurement Methods & Guidelines Per Budget Threshold

This overview outlines the procurement methods, including budget thresholds and procurement process carried out by the GGF TAF.

3.1. Open Tender

Description	Projects are awarded through a public, one stage competitive tendering process, allowing all interested parties to submit bids. Open Tender method involves a requirement for international notification through the publication of tender on public procurement platforms and the Fund's website.
Budget limits	Above EUR 221,000 - for the award of service contracts targeting Financial Institutions and other institutions that do not operate in the water, energy, transport and postal services sectors (restricted tendering can also be used, please see below). Above EUR 443,000 - for the award of service contracts targeting entities operating in the water, energy, transport and postal services sectors (restricted tendering can also be used, please see below).
Procurement Process Overview	<ul style="list-style-type: none"> • The Letter of Invitation is published on international procurement platforms, such as the Official Journal of the EU (OJ), GTAI.de, Devex, and the Fund's website. • Submissions are evaluated based on pre-defined criteria. • An integrity check is performed to verify the eligibility of the selected bidder. • The selected bidder is presented to the TAC for approval. • Contract negotiations are conducted with the selected bidder.

3.2. Restricted Tender

Description	Projects are awarded through a public, two-stage competitive tendering process. The TAF Manager issues an international Call for Expression of Interest (EOI), and, following the evaluation of the received EOIs, establishes a shortlist of bidders. These shortlisted bidders are then invited to submit their proposals through a RFP.
Budget limits	Above EUR 221,000 - for the award of service contracts targeting Financial Institutions and other institutions that do not operate in the water, energy, transport and postal services sectors. Above EUR 443,000 - for the award of service contracts targeting entities operating in the water, energy, transport and postal services sectors.
Procurement Process Overview	<p>The Call for Expression of Interest (EOI) is published on international procurement platforms, such as the Official Journal of the EU (OJ), GTAI.de, Devex, and the Fund's website.</p> <ul style="list-style-type: none"> EOIs are evaluated based on the following weighted criteria: <ul style="list-style-type: none"> Institutional capacity and resources in the required area of expertise (50%) Relevant experience successfully carrying out similar assignments (50%) A shortlist of at least three bidders is established based on the EOI evaluation scores. The shortlist is presented to the TAC for approval. The RFP is issued to the shortlisted bidders. Submissions are evaluated based on pre-defined criteria. An integrity check is performed to verify the eligibility of the selected bidder. The selected bidder is presented to the TAC. Contract negotiations are conducted with the selected bidder.

3.3. Selective Tender

Description	Projects are awarded through a simplified tendering process. The TAF Manager develops a shortlist of at least three bidders and invites them to submit proposals through RFP.
Budget limits	EUR 50,000 - EUR 221,000 - for the award of service contracts targeting Financial Institutions and other institutions that do not operate in the water, energy, transport and postal services sectors.

	EUR 50,000 - EUR 443,000 - for the award of service contracts targeting entities operating in the water, energy, transport and postal services sectors.
Procurement Process Overview	<ul style="list-style-type: none"> • A shortlist of at least three bidders is established from the TAF Manager's service provider database. • Approval of the shortlist by the TAC in the project proposal. • The RFP is issued to the shortlisted bidders. • Submissions are evaluated based on pre-defined criteria. • An integrity check is conducted to verify the eligibility of the selected bidder. • Contract negotiations are conducted with the selected bidder.

3.4. Direct Award

Description	The TAF Manager directly contracts a service provider based on project requirements, including professional expertise, technical skills, regional experience, and language proficiency. The TAF Manager may conduct a market screening by reaching out to up to three service providers, with the objective of identifying a suitable service provider for a direct award.
Budget limits	Under EUR 50,000
Procurement Process Overview	<ul style="list-style-type: none"> • A service provider¹ is screened and/or pre-selected based on their track record and expertise. • An integrity check is conducted to verify the eligibility of the selected bidder. • The selected service provider is presented to the TAC for approval. • Contract negotiations are conducted with the selected service provider.

3.5. Fast-Track Procedure

Description	<p>In exceptional cases, regardless of budget and upon prior approval from the TAC, a fast-track procurement process may be applied when one of these conditions apply:</p> <ul style="list-style-type: none"> • There is a limited number of specialists in the required field of expertise so that an extensive competitive bidding process would cause unnecessary delays or resource consumption.
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¹ The term „Service Provider’ refers to a selected individual consultant or consulting company.

	<ul style="list-style-type: none"> • The degree of urgency, duly justified, is such that there is insufficient time for a broader search and/or competitive bidding process. • Confidentiality concerns are paramount and prevent the involvement of multiple bidders. • A previous tender has failed to produce results. • Continuity with a service provider who has been involved in earlier project stages is necessary, and competitive bidding would not provide any additional benefit. • A high-risk profile institution requires a closely managed selection process in collaboration with the Fund's investment management team. • The partner institution has gone through a procurement process, the validity and alignment thereof with the GGF procurement procedures having been verified by the TAF Manager. Hence a renewed competitive bidding would not provide additional benefits.
Procurement Procedure Overview	<ul style="list-style-type: none"> • A service provider is pre-selected. • The TOR is submitted to the pre-selected service provider. • The pre-selected service provider is assessed based on their track record in the relevant geographical and technical areas outlined in TOR. • Abbreviated technical and financial proposals are requested. • An integrity check is conducted to verify the eligibility of the pre-selected service provider. • The pre-selected service provider is presented to the TAC for approval. • Contract negotiations are conducted with the selected service provider.

4. Tender Procedure

4.1. Presentation of Tender

Bidders must submit '**Tender Documents**', the technical and financial proposal as well as any other document requested in the RFP, in electronic form (PDF file) via e-mail. The technical and financial proposals must be sent as two separate files, each being clearly labelled as "**Technical Proposal**" and/or "**Financial Proposal**".

The financial proposal must be **password-protected**. Information related to the financial proposal must not be included in the technical proposal. The TAF Manager will only request the password for the financial proposal, if the respective technical proposal obtains the required minimum of evaluation

points (see chapter 6 'Tender Evaluation'). The password shall not be provided or shared until requested by the TAF Manager.

Please note: only in **direct award** procurement method, both the technical and the financial proposal, as well as any other documents requested by the TAF Manager, can be submitted without password-protecting the financial proposal.

The TA Procurement Unit of the TAF Manager ensures that the submitted tender documents are not accessed until the initiation of the evaluation process.

The deadline for the receipt of tender documents is defined in the RFP and/or LOI. **All tender documents received after that deadline will be automatically rejected without evaluation.**

4.2. Language of Tender

The technical and the financial proposal, as well as all communication related to the present tender shall be prepared in the English language. In exceptional cases, other languages may be used if explicitly specified in the TOR or RFP.

4.3. Submission of Tender

The TA Procurement Unit of the TAF Manager will handle the tender process. Bidders should address the e-mails containing the tender documents to the TA Procurement Unit of the TAF Manager at the email address specified in the RFP.

4.4. Contracting Authority

The contracting authority is the GGF TAF, represented by TAF Manager. A specific consulting services agreement will be concluded between the GGF TAF and the Service Provider, in some cases also a tripartite contract with the beneficiary. Contracts will be subject to the General Terms and Conditions available on the [Fund's website](#).

4.5. Validity Period of Tenders

The period of validity of tenders is 120 days from the deadline for receipt of tenders indicated in the RFP or LOI.

4.6. Request for Additional Information

Any question, communication or request for additional information concerning the tender process is only permitted in writing (via e-mail) to the TA Procurement Unit of the TAF Manager on the following e-mail address: ta.procurement@finance-in-motion.com. If any clarification regarding the tender process is necessary, the answers will be communicated simultaneously in writing (via e-mail or, if applicable, on the [Fund's website](#)).

In the Open Tender procurement method, answers will be provided to all candidates who have notified the TAF Manager of their interest in the tender.

4.7. Confidentiality

All documents shared with the shortlisted bidders in the framework of the tender process are to be treated as strictly confidential and may not be shared with third parties without prior approval of the TAF Manager.

4.8. Cancellation

The TAF Manager reserves the right to cancel the tender process at any time if it deems so appropriate. Bidders participate in the tendering process with the understanding that they are not entitled to any form of compensation if the TAF Manager decides to terminate the tender process before the contract is signed.

4.9. Exclusion

Bidders who fail to adhere to the requirements described in this chapter or to the deadline for submission of tender documents, will be excluded from the tender.

5. Content of Tender

5.1. Technical proposal

The technical proposal should address the requirements of the project specific TOR and comprise the following:

- I. A relevant company/consortium profile
 - a. An overview of the company's relevant experience (by topic, sector and/or region) aligned with the objectives of the project.
 - b. References of **relevant** projects carried out by the bidder in the last 10 years disclosing: location, duration of project, donor, volume of the project, and duly reflecting technical expertise and achieved results. They shall be submitted as an annex to the proposal and shall be limited to one page each.
 - c. Declaration by the company/consortium indicating the total annual turnover in Euro for the last 3 (three) years – as annex.
- II. Critical analysis of the TOR

The bidder is invited to critically analyse the following sections of the TOR: 'Tasks to be realized' and 'Deliverables', pointing out any possible short-comings and/or suggesting his/her solutions and ideas, which can enhance the quality of the assignment and its output.
- III. Proposed concept
 - a. Methodological approach and implementation concept².

² Bidders should not simply quote the TOR but should demonstrate how their approach will address the requirements of the TOR.

- b. Work plan including time and staffing schedule³.
- c. A short overview of project organization. It shall include **project lead, key topics, roles and responsibilities** of the proposed team. This can be illustrated, for example, as a descriptive organization chart and should not exceed one page.

IV. Qualification and composition of the team

- a. Description of the team: the proposed team members should comply with the requirements of the TOR. The response should demonstrate **why** their expertise and previous experience is relevant for the project and **how** it will be used for the benefit of the project.
- b. Description of the tasks to be performed by each team member.
- c. CVs of the proposed staff – in the format provided [here](#).

Unless specified differently in the RFP, the technical proposal (excluding annexes) shall be concise and not exceed 10 (ten) pages in total. CVs should not exceed 4 (four) pages each.

5.2. Financial proposal

Unless specified differently in the RFP, the financial proposals shall be prepared using the budget template, available for download on the [Fund's website](#).

For Impact Assessment (IA) TA projects, the IA designated budget template must be used.

The bidder shall be responsible for verifying the applicability of any taxes. In the event taxes are applicable, the bidder shall list them separately in the budget template. Please note the GGF tax number: LU 23693416.

All expenses shall be expressed in Euro (EUR) or, if applicable in US Dollars (USD).

5.3. Counterparty Information Sheet

Upon request, the bidder must provide the required identification information as specified in the Counterparty Information Sheet. The form is available for download on the Fund's website. The Counterparty Information Sheet should be submitted in both excel and PDF format.

Finance in Motion GmbH processes the data obtained from its counterparties following the Data Privacy Notice to be found on the [Fund's website](#).

6. Tender Evaluation

The evaluation of the tenders received will follow a five-step approach:

³ Including a quantitative appreciation of the workload required (in expert-days) for each of the specified sub-tasks for each of the team members and/or per each type of Impact Assessment, if this service is required in the TOR.

Step 1: Evaluation of the technical proposal

Only the technical proposal will be opened on the submission date. The quality of each technical proposal will be evaluated according to the award criteria listed in the chapter 7 of this document.

If direct award procurement method is applied, both the technical and the financial proposal are evaluated at the same time. Thus, step 1 and 3 will be merged.

Step 2: Interviews (if applicable)

As part of the technical proposal evaluation, the TAF Manager may contact one or more bidders (e.g.: their lead expert and/or some of their key project team members), with the purpose to verify their capacity and capability to implement the TOR as laid out in the technical proposal.

Step 3: Evaluation of the financial proposal

For bidders obtaining a minimum of 55 points (of maximum 80 points) on their technical proposal and proposed staff (including interviews), the password to the financial proposals will be requested.

The financial proposal with the lowest budget will be awarded the maximum score of 20 points. For higher proposed budgets, the score will be calculated by dividing the lowest proposed budget by the budget under consideration and multiplying the result by maximum score (20).

Step 4: Selection of the winning bidder and contract negotiations

The tender evaluation will be summarized in writing, including a comparison of the submitted proposals and a recommendation on the contract awarding.

The TAF Manager will perform an integrity check using the Counterparty Information Sheet, as well as other relevant documentation.

The bidder whose offer achieves the highest score on the technical proposal and the financial proposal combined, and whose integrity check is assessed as satisfactory, will be considered the winning bidder.

The TAF Manager will invite the winning bidder to contract negotiations. In case no agreement can be reached with the 1st placed bidder, the TAF Manager will proceed to negotiate the contract with the 2nd placed bidder or cancel the tender and launch a new tender. As part of the contract negotiations, it is not permitted to re-negotiate essential terms and conditions of technical and financial proposals.

In case of open or restricted tendering, the TAF Manager will submit to the TAC the proposed bidder's offer for endorsement prior to the start of contract negotiations.

Step 5: Notification of other bidders

The TAF Manager notifies the unsuccessful bidders via email.

7. Award Criteria

The TAF Manager will select the winning bidder, applying the approach to evaluation as set out in the previous chapter "Tender Evaluation", using the award criteria and weightings in the Tender Evaluation Grid provided below.

Tender Evaluation Grid

	Criterion	Max points
A	Quality of the technical proposal	35
A-1	Analysis of the Terms of Reference	10
A-2	Proposed approach	25
B	Qualification and composition of the team	45
B-1	Specific professional skills / expertise of proposed experts and company's relevant experience	25
B-2	Appropriate team composition enhancing the delivery of consultancy services (e.g. illustrated as an organizational chart)	10
B-3	Regional expertise ensuring in-depth knowledge of the local environment	10
C	Financial proposal	20
C-1	Financial proposal	20
TOTAL		100

8. Monitoring

During project implementation, the Service Provider shall closely cooperate with the TAF Manager, keeping him/her up to date regarding all significant (incl. anticipated/expected/required) deviations from the TORs and providing project outputs as defined in the TORs.

The Service Provider shall submit a draft of the specified deliverables (e.g.: study, questionnaires) in accordance with the project schedule and assignment requirements. The TAF Manager will comment on the documents within the agreed timeframe, to be incorporated into the final deliverables. The Service Provider must be capable of collecting all necessary data for the preparation of the deliverables

Any change in the composition of the team after the submission of tender documents shall be subject to prior written approval by the TAF Manager. Any replacement shall have comparable skills, background and experience.

9. Evaluation

The TAF Manager is required to prepare an internal evaluation report on the Service Provider's performance. Performance tracking will be done by the TAF Manager. At completion of the project the TAF Manager, along with beneficiaries, will evaluate the performance as well as the effectiveness of the project.

10. Remuneration

Subject to the contractual agreement, the Service Provider shall be paid at the rates set out in its original financial offer. Payments shall be subject to prior acceptance of the deliverables. Any specific problems with the acceptance of deliverables will have to be resolved by the Service Provider before invoices are approved and payments are made, as defined in the TOR. Depending on the type of project and in line with the contract, the Service Provider shall submit invoices in accordance with the following provisions:

Option 1

Advance payment: The Service Provider will be entitled to an advance payment of at least 15 % of the total value of the TA assignment.

Interim Payment(s): [an] interim payment[s] shall be paid after completion of certain project stages, against presentation of an invoice. Payments shall be subject to prior acceptance of the deliverables and the Service Provider's reports by the TAF Manager and (in case of a tripartite contract) by the beneficiary.

Final Payment: The final payment is subject to approval of all deliverables and the Final Report by the TAF Manager and (in case of a tripartite contract) by the beneficiary.

Option 2 – As a rule, applies for impact assessment services projects

Quarterly Payments: The Service Provider shall submit an invoice at the beginning of each quarter, which shall cover the services provided during the preceding quarter. The Service Provider will be paid only for the services conducted and support given, which can be lower than estimated.