

European Commission

**Regional Balkans
Infrastructure Study -
Transport**

Appendix 10 - Final Report

Training

July 2003

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1 Introduction and objective

One of the bottlenecks for improving the transport infrastructure is the lack of experience in the preparation of projects for international financing and tendering. Taking into consideration that in the coming years the Balkan countries will receive substantial amounts from the EC via the Cards programme and substantial loans from IFI's, there is a great need for capacity building related to international procurement procedures. As part of the REBIS study, five seminars have been held in order to present an overview of the project cycle and to introduce international procurement procedures. The aim of the seminars was to present relevant topics to the participants so that they, at a later stage, will be able to go into more detail in one or more of the items.

2 Timing and content of the seminars

2.1 Timing

The seminars were held according to the following time schedule:

- Zagreb, 13th-14th May
- Belgrade, 19th-20th May
- Tirana, 21st-22nd May
- Sarajevo, 3rd-4th June and
- Skopje, 24th-25th June

2.2 Programme

The programme for the seminar included the following main modules:

- Introduction
- Project cycle
- Feasibility study
- EC procurement rules
- Procurement of services
- Procurement of works
- Tender evaluations

The first day gave a general, common introduction to the Project Cycle, and on the second day it was possible to follow either Economic and Financial Analyses or Implementation of Works Contracts. In order to illustrate the theoretical part in practice, a number of workshops were included in which the participants were given the opportunity to work in smaller groups. A detailed programme is shown in Annex 1.

The seminars were held in English but the slides used (around 260) were handed out in a double language version so that the English version was shown side by side with a translation into the local language.

The lecturers were a transport economist and a civil engineer both of whom have considerable experience in the project cycle elements as well as in training.

The typical number of participants was between 20 and 25 and they represented public servants from ministries, railway, road, port or airport administrations and municipalities as well as private design companies. In Belgrade, six participants from Montenegro attended the seminar and in Skopje representatives from Kosovo participated.

The seminars were held in hotels with facilities for seminars and with the possibility of splitting the presentation into two streams on day two.

3 Results

3.1 Questionnaire

A questionnaire was filled in by the participants in order to check the quality of the presentations, the material handed out and its relevance for the participants. On the whole the seminars received very positive response and although it was only possible to give the participants an overview of the items, the typical reaction was that the seminars were successful. An example from Tirana is inserted in Annex 2 and summary of the results from all seminars is presented below:

Location	Satisfaction = Good	Satisfaction = Sufficient	Satisfaction = Not sufficient	Overall rating (max. 10.00)
Zagreb	13	0	0	10.00
Belgrade	14	3	0	9.41
Tirana	15	1	0	9.79
Sarajevo	11	1	0	9.72
Skopje	8	0	0	10.00

A few remarks were received as part of the course evaluation and they generally asked for more time to be spent on individual items, more time for practical workshops and a few also asked for better translation of the documents.

3.2 Further training need

There is no doubt that there is a huge need for additional seminars covering the project cycle items and it is proposed that more seminars be arranged, targeting the individual items in more details, e.g. by using two or three days seminars covering feasibility studies or EC procurement rules. This will enable the training to be tailor-made to the needs of the participants and also allow greater detail within each item.

Annex 10.1 Training programme

Programme for a two-day seminar covering Procurement, Feasibility Studies and Works Tenders			
	Day 1	Day 2	
Morning Sessions			
09:00 – 10:00 (60 min)	Introduction Introduction to the participants and trainers. Course content and purpose. Module A, Project cycle Programming Identification Formulation Financing Implementation and monitoring Evaluation	Module G, Preparation of Works Tender (Legal) - FIDIC Conditions of Contract ("Red Book") - Form of Tender/Appendix - Tender Security	
10:00 - 10:30 (30 min)	Module B, EC Procurement procedures Manual of Instructions. Practical Guide Basic Concepts Services, Supplies and Works	Workshop G on Instructions and Conditions	
10:30 – 11:00	<i>Coffee break</i>	<i>Coffee break</i>	
11:00 – 11:45 (45 min)	Module C, Work Activities for a Road Feasibility Study Why a feasibility study, Technical studies, Technically feasible options, Economic evaluation, Environmental evaluation, Social evaluation, Financial evaluation, Recommendations/decisions	Module H, Works - Tender Evaluation Evaluation Committee and Evaluation Criteria Preparatory Meeting Tender Opening Evaluation of Eligibility, Qualifications, Conformity and Formalities Technical Evaluation Financial Evaluation Workshop H on Tender Evaluation (CV+ BoQ) incl. presentation and discussion	
11:45 - 12:30 (45 min)	Module D, Services Procedures and Regulations, Terms of Reference (Technical Specifications), Invitation Document (Announcement), Technical and Financial Proposals (Prequalification, Selection Criteria, Tender Dossier, Schedule of prices), Evaluation, Negotiations and Contracting, EC endorsement, Monitoring.	Module I, Implementation of Works Contracts FIDIC Conditions of Contract Construction Supervision	Module J, Economic and Financial analysis Rational and difference between economic and financial analysis Economic analysis Financial analysis Economic decision criteria (NPV, EIRR, FYRR)
Afternoon Sessions			
14:00 – 15:00 (1 hour)	Module E, Works Tendering, Basic Concepts - Time axis - Engineering design - Technical Specifications - Engineering drawings - Bill of Quantities - Factual Reports - Engineer's Cost Estimate - Tenders and Tender Evaluation - Negotiations and Contracting - EC endorsement - Implementation and Site supervision - Presentation and discussion	Workshop I1 on Implementation of Works Contracts	Module JI, on Economic analysis Case study - economic analysis of project Calculation of first year of return
Break			
15:10 - 16:00 (60 min)	Module F, Works Tender Documents (Administrative) - Practical Guide requirements - Instructions to Tenderers - Questionnaire - References - Alternative Tenders	Workshop I2 on Implementation of Works Contracts Presentation and discussion	Module JI, on Economic analysis Case study - economic analysis of project Calculation of first year of return. Presentation and discussion
16:00 – 16:30	<i>Coffee break</i>	<i>Coffee break</i>	
16:30 – 17:00 (30 min)	Workshop F1 on Technical Specifications and Bill of Quantities	Course Evaluation Evaluation Sheets. Joint evaluation of achievements	

Annex 10.2 Typical questionnaire

Seminar in Project Cycle
Tirana, 21 - 22th May, 2003

Evaluation Questionnaire for filling in by participants

1 – General Information		
Background of participant:	- Ministry	
	- Road/Railway Authority	
	- Local Contracting Authority	
	- Designer/Consultant	
	- Contractor/Other	

Are you handling or will you likely deal with EU Procurement and Contracting of :

	Yes	No
- Services		
- Supplies		
- Works		

2 – Was the style of presentation for					
		Good	Sufficient	Not sufficient	Comments
Day 1	Introduction				
	Module A				
	Module B				
	Module C				
	Module D				
	Module E				
	Workshop E				
	Module F				
	Workshop F1				
Day 2	Module G				
	Workshop G				
	Module H				
	Workshop H				
	Module I				
	Workshop I				
	Module J				
Workshop J1					

3 – Quality of the contents

		Good	Sufficient	Not sufficient	Comments
Day 1	Introduction				
	Module A				
	Module B				
	Module C				
	Module D				
	Module E				
	Workshop E				
	Module F				
	Workshop F1				

Day 2	Module G				
	Workshop G				
	Module H				
	Workshop H				
	Module I				
	Workshop I				
	Module J				
	Workshop J1				

4 – Quality of materials used and distributed for

		Good	Sufficient	Not sufficient	Comments
Day 1	Introduction				
	Module A				
	Module B				
	Module C				
	Module D				
	Module E				
	Workshop E				
	Module F				
	Workshop F1				

Day 2	Module G				
	Workshop G				
	Module H				
	Workshop H				
	Module I				
	Workshop I				
	Module J				
	Workshop J1				

5 – Will the training be relevant to you in your work for				
	Yes	Perhaps	No	Comments
Procurement, Services				
Procurement, Works				

6 – Suggestions for improvement for					
	No	Less time	More time	More exercises	Others
Procurement, Services					
Procurement, Works					

7 – Overall rating of the course:			
	Good	Sufficient	Not sufficient

8 – Other Comments
 Any missing elements?