



**PRIVATE SECTOR  
DEVELOPMENT  
PROGRAMME**

**Consortia Business Development Services (BDS)  
Call For Proposals  
Guidelines For Applicants**

# Guidelines for Applicants Consortia BDS

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## 1 The PSDP Programme

### 1.1 Background

The Private Sector Development Programme (PSDP) is a four-year €28.67 million technical assistance programme, financed jointly by the European Union, under the 9<sup>th</sup> European Development Fund (EDF), and the Government of Jamaica (GOJ).

The PSDP's main goal is to enhance the perspective of socio-economic development through strengthening of the private sector in Jamaica in the challenging context of globalisation and liberalisation of the economy. The objective of the programme is to enhance the competitiveness of micro, small and medium-size enterprises (MSMEs) and to strengthen their support and representative organizations.

Jamaica Promotions Corporation (JAMPRO), via its Project Management Unit (PMU) will manage the PSDP. Two other organisations, i.e. the Jamaica Business Development Centre (JBDC) and the Private Sector Organisation of Jamaica (PSOJ), will, in conjunction with JAMPRO, execute select activities under the Programme.

### 1.2 Expected Results

The following expected results are to be achieved:

- Empowerment of private sector organizations and support institutions in the local environment;
- Development of System(s) for the provision and improved delivery of relevant Business Development Services (BDS) both through demand-led and supply-driven initiatives;
- Enhanced access to corporate finance for MSMEs.

## 2 Consortia BDS Call for Proposals

### 2.1 Objectives

The objective of this call for proposals is to invite eligible private sector organisations and support institutions (hereinafter called PSOs) within the private and public sectors to submit applications/proposals for technical assistance grant funding<sup>1</sup> on a cost-sharing basis, under the Consortia BDS facility. This facility is aimed at enhancing the capacity of private sector organizations & support institutions (PSOs) to help micro, small, and medium enterprises (MSMEs) build competitiveness, in order to respond and adapt to developments within the domestic and global environment. To achieve this, PSOs will be able to access grant funds on a cost-sharing basis to provide demand-driven BDS to their members and other groups of companies (consortia) based in the MSME sector, in the form of multiple workshops/seminars.

MSMEs are companies with less than 200 employees and/or with an asset base of less than €1 million. They can be further defined as:

Enterprise	Permanent Employees	Asset Base
Micro	1-4	Under €15,000
Small	5-50	€15,000 – 230,000
Medium	51-200	Up to €1 million

PSOs will be able to call upon independent service providers, to offer BDS responding to their members' requirements. More than one PSO can collaborate or partner with each other to conduct proposed workshops/seminars. However the lead PSO in the partnership should submit the application for funding.

<sup>1</sup> Note that no profit is to be accrued in the use of grant funds to finance the action/project.



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## 2.2 Budget

The estimated budget for this activity over the four-year period is €1,200,000. Activities/actions will be funded on a 75:25 cost-sharing basis with the PSDP funding 75% of eligible costs and the PSO beneficiary contributing 25%. More than one grant contract under this facility may be awarded to a PSO during the lifetime of PSDP though not concurrently. The maximum grant per PSO per contract is €80,000<sup>2</sup>. Note that no profit is to be accrued in the financing of the action/project.

## 2.3 Eligibility Criteria

The PMU and beneficiaries will adhere to the basic rules governing grant contracts as defined in the *'Practical Guide to contract procedures financed from the 9th European Development Fund'* Section 6, entitled Grants. These rules include Programming, Transparency, Equal treatment, Non-cumulation, No retroactivity, Co-financing, Non-profit, and Rules of sound management and can be found on the European Commission's website at [http://europa.eu.int/comm/europeaid/tender/gestion/fed/fed\\_npg\\_en.doc](http://europa.eu.int/comm/europeaid/tender/gestion/fed/fed_npg_en.doc), the document is also available in hard copy from the PMU.

### 2.3.1 Eligibility of Applicants: Who may apply

In terms of PSDP classification, private sector organizations and support institutions (PSOs) are any eligible institutions that are legally registered in Jamaica with majority Jamaican ownership, including Non-Governmental Organisations (NGOs) and are based within the private and public sectors. They include, but are not limited to, certifying or regulatory bodies, representative organisations, business support entities, institutions that provide micro and SME finance, training institutions or trade/industry associations. PSOs are typically institutions that provide critical business development services (BDS) or business facilitatory/support services to their members and/or multiple clients within the MSME sector, geared at enhancing productivity and firm-level competitiveness. BDS include but are not limited to marketing support, training, technical advisory, lobbying, policy representation, trade information, business advice etc. For further clarification, **any** organisation that has a significant membership/client base within the MSME sector and is offering, or intends to offer, BDS as defined above will be classified as a PSO.

Additionally, any organisation offering services to groups of MSMEs on a sustainable basis, for purposes of enhancing the productivity and firm-level competitiveness of such companies will be classified as a PSO under the Private Sector Development Programme. Such entities will therefore be eligible for grant support for capacity building and for support under other PSDP components where the services and/or products being offered will lead to enhanced productivity and improved competitiveness at the firm level.

*JSDA?* New PSOs in operation for under 12 months will be eligible for assistance providing that they have developed a viable strategic business plan, which must be submitted with their application, along with the CVs of the CEO/President (or equivalent) and the Operational Manager or Director. **Annex 1** provides a template which outlines the areas to be addressed by the strategic plan.

In summary, to be eligible for a grant under this facility, a PSO must:

- Be legally registered in Jamaica with majority Jamaican ownership;
- Have wide membership/clientele representing the MSME sector;
- Fulfil the definition requirements of a PSO as articulated above;
- Be directly responsible for the preparation and management of the project;
- Have stable and sufficient sources of finance to ensure the continuity of their organisation throughout the project and to play a part in financing activities;
- Be experienced and able to demonstrate their capacity to manage initiatives corresponding with the size of the project for which a grant is requested.

<sup>2</sup> The estimated average cost of a workshop/seminar is €7000.





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MSMEs who are benefiting from PSO-managed Consortia BDS grants should:

- Be legally registered in Jamaica with the Office of Registrar of Companies (ORC) and be majority Jamaican-owned.
- Have less than Euro 1 million in assets and /or less than 200 employees
- Be operating within priority sectors (production and services) of the NIP

### 2.3.2 Eligibility of Actions

Actions are multiple workshops/seminars to be funded with Consortia BDS grants, which are geared at building and improving firm level competitiveness. **Workshops/seminars** may cover, but are not limited to, the following areas:

- Development of strategic and business plans;
- Marketing research and marketing plans including export market development;
- New Business/market opportunities
- Sales promotion, distribution (including website development & e-commerce);
- Production management, procurement & inventory management;
- Quality improvement and control including certification (ISO, HACCP);
- Management information system/s;
- Financial management;
- Facilitation of legal work and joint venturing to capitalise on business opportunities;
- New Product Offerings: development of new service/product offerings to clients;
- Effective Pricing & Costing.

### 2.3.3 Eligibility of Costs

PSO beneficiaries will contribute at least 25% toward total Action costs on a pro-rata basis. PSDP grant funds can be used in one of two ways i.e. either (i) to subsidise expenses relating to the organizing of workshops e.g. venue, presenters' fees, promotion of workshops etc. **OR** (ii) to subsidise 75% of the participant fees to be charged to participating companies based in the MSME sector. With respect to the latter, the PSO beneficiary must request that participating MSMEs pre-register for the workshop/seminar by paying their 25% in advance. The PSDP will reimburse the PSO upon the submission of receipts, completed workshop/seminar evaluation forms from the participating enterprises and report on the event.

To be considered eligible for grant funding, PSO costs must:

- Be necessary for carrying out the action, approved and included in the PMU/PSO grant contract and comply with the principles of sound financial management, in particular value for money and cost-effectiveness.
- Have actually been incurred by the beneficiary during the implementation period of the action, whatever the time of actual disbursement by the beneficiary providing that disbursement has occurred during the agreed implementation period.
- Be recorded in the accounts or tax documents of the beneficiary, verified and backed by originals of supporting evidence.

Subject to the above, the following PSO costs, which are directly related to approved actions, are eligible for grant funding and /or as the cost-sharing contribution of the PSO:

- The cost of staff assigned to the action corresponding to the actual salaries plus social security charges and other remuneration-related costs; salaries and costs must not exceed those normally borne by the beneficiary. Per diems relating to staff travel overseas and associated with the implementation of the action, which must not exceed the scales approved annually by the European Commission;
- Purchase costs for equipment (new or used) and services directly related to the action, provided they correspond to market rates and comply with the rule of origin requirements outlined in section 2.4.3;

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- Costs of consumables and supplies;
- Sub-contracting expenditure;
- Costs derived directly from the requirements of the Contract (dissemination of information, audits, translation, reproduction, insurance, etc.) including financial service costs (in particular the cost of transfers of financial guarantees);
- A lump sum not exceeding 7% of the direct eligible costs of the Action may be claimed as indirect costs to cover the administrative overheads incurred by the beneficiary for the Action.
- Indirect costs are eligible provided they do not include costs assigned to another heading of the Grant Contract budget.

The following shall not be considered eligible and may not be treated as any part of the cost-sharing contribution to the total Action costs or as co-financing by the beneficiary.

- Debts and provisions for losses of debt
- Interest owed;
- Items already financed in another framework or by another financier;
- Purchases of land or buildings;
- Currency exchange losses;
- Taxes, including GCT;
- Any contributions in kind made by the beneficiary that do not represent actual expenditure and are therefore not eligible costs.
- Indirect costs are ineligible if the beneficiary receives, in other aspects, an operating grant from the European Commission;

The duration of an Action (from the date of approval of the award to its completion) may not exceed 9 months from the signature date of the PMU/PSO grant contract. An Action must start no later than three months after the signature date of the grant contract between PMU and the PSO.

### 2.3.4 Grounds for exclusion from participation

Applicants will be excluded from participation if:

- a. They are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b. They have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
- c. They have been guilty of grave professional misconduct proven by any means which the Beneficiary can justify;
- d. They have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Beneficiary or those of the country where the contract is to be performed;
- e. They have been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the PSDP's or European Communities' financial interests;
- f. Following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

### 2.3.5 Exclusion from award of grant contracts

Grants may not be awarded to applicants who, during the application procedure:

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- Are subject to a conflict of interests;
- Are guilty of misrepresentation in supplying the information required as a condition of participation in the contract procedure or fail to supply this information.

### 2.4 Procurement by Grant Beneficiaries

#### 2.4.1 General Principles

If the implementation of an Action requires procurement by the Beneficiary, the contract must be awarded to the most economically advantageous tender (i.e., the tender offering the best price-quality ratio), in accordance with the principles of transparency and fair competition for potential contractors and taking care to avoid any conflicts of interest. To this end, the Beneficiary must comply with the rules set out below.

Where the Beneficiary makes use of the services of a central buying office, the buying office must obey the same rules as the Beneficiary.

In the event of failure to comply with the rules referred to above, expenditure on the operations in question is not eligible for PSDP financing. The PSDP and/or European Commission will carry out ex post checks on beneficiaries' compliance with the rules.

#### 2.4.2 Nationality Rule

Participation in tender procedures administered by the Beneficiary is open on equal terms to all natural and legal persons of the EU Member States or ACP states as defined in the ACP-EU Cotonou Agreement. This rule also applies to the experts proposed by service providers taking part in tender procedures or service contracts financed by the grant. Tenderers must state, in the tender, the country of which they are nationals by presenting the usual proof of nationality under their national legislation.

#### 2.4.3 Rules of Origin

Goods and services acquired by the Beneficiary must originate from the EU Member States or ACP states as defined in the ACP-EU Cotonou Agreement. Tenderers must state the origin of supplies and present a certificate of origin to the Beneficiary no later than when the first invoice is presented. The certificate of origin must be made out by the competent authorities of the country of origin of the supplies or supplier and must comply with the international agreements to which that country is a signatory or to the relevant Community legislation if it is an EU Member State. Supplies of foreign origin up to €150,000 can be purchased on the domestic market only if the goods are in stock locally. Supplies of foreign origin should not be specially imported to fill any gaps due to goods being out of stock.

#### 2.4.4 Exception to the rules on nationality and origin

In exceptional cases where rules of nationality and origin will impact on the efficiency of implementation of an action the PMU may upon request seek a derogation to these rules from the EC Delegation. This will be the exception rather than the rule, and will apply on a case-by-case basis in the following circumstances:

- (a) The competitiveness of contractors, suppliers and consultants from the Member States and the ACP States;
- (b) The need to avoid excessive increases in the cost of performance of the contract;
- (c) Transport difficulties or delays due to delivery times or other similar problems;
- (d) Technology or expertise that is the most appropriate and best suited to local conditions.

#### 2.4.5 Grounds for exclusion from participation in procurement

Candidates or tenderers will be excluded from participation in a procurement procedure if they fall under any of the conditions outlined in 2.3.4 above.

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### 2.4.6 Exclusion from award of contracts

Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:

are subject to a conflict of interest;  
are guilty of misrepresentation in supplying the information required by the beneficiary of the grant as a condition of participation in the contract procedure or fail to supply this information.

### 2.4.7 Procurement Rules Applicable

Procurement by Grant Beneficiaries will fall into one of three types of contract:

- Service – contracts for services, e.g. technical assistance, studies, provision of know-how and training;
- Supply – e.g. equipment and materials;
- Works – e.g. infrastructure and other engineering works.

The procurement thresholds given in the table are based on the maximum budget for the contract in question (including any co-financing). In the case of mixed contracts covering a combination of works, supplies or services, the award procedure to be used will depend on which of the components (works, supplies or services) predominates, an assessment that will be made on the basis of its value and strategic importance relative to the contract as a whole.

<b>Service</b>	€200,000+ International Restricted Tender	> €5,000 - €200,000 Negotiated procedure	€5,000 or less Single tender
<b>Supply</b>	€150,000+ International Open Tender €30,000 - €150,000 Local Open Tender	> €5,000 - €30,000 Negotiated procedure	€5,000 or less Single tender
<b>Works</b>	€5,000,000+ International Open Tender €300,000 - €5,000,000 Local Open Tender	> €5,000 - €300,000 Negotiated procedure	€5,000 or less Single tender

#### 2.4.7.1 International Open Tender

International open tender contracts are awarded following publication of a procurement notice.

The procurement notice is to be published in all appropriate media, in particular on the grant beneficiary's web site, in the international press and the national press of the country in which the action is being carried out, or in other specialist periodicals.

Any would-be supplier that fulfils the eligibility criteria may submit a tender.

#### 2.4.7.2 International Restricted Tender

International restricted tender contracts are awarded following publication of a contract notice.

The contract notice is to be published in all appropriate media, in particular on the grant beneficiary's Internet site, in the international press and the national press of the country in which the operation is being carried out, or in other specialist periodicals. It must state the number of candidates who will be invited to submit tenders. This will be within a range of four to eight candidates, and must be sufficient to ensure genuine competition.



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All would-be service providers fulfilling the eligibility criteria may ask to participate but only candidates satisfying the published selection criteria and invited in writing by the grant beneficiary, may submit a tender.

### 2.4.7.3 Negotiated procedure

These contracts must be awarded by means of a negotiated procedure without publication, in which the Beneficiary consults at least three service providers of its choice and negotiates the terms of the contract with one or more of them.

### 2.4.7.4 Single tender

Beneficiaries may place orders on the basis of a single tender.

## 2.5 How to Apply

Applications must be typed and submitted in English on the application form attached in **Annex 2**. The application form should be completed carefully and as clearly as possible. **Incomplete applications or those that cannot be read/understood will be rejected.** The application form and supporting documents are to be submitted in triplicates i.e. one (1) original and two (2) copies.

Each proposal must be placed in a sealed parcel or envelope bearing:

- the address for submission of proposals indicated in the call for proposals;
- the reference number of the call for proposals to which the applicant is responding;
- the full name and address of the applicant;
- the words ***"Not to be opened before the opening session"***.

Applications must be sent by registered mail or express messenger or by hand-delivery. They must contain the original and two copies of the completed application form, budget, and other supporting documents required in the call for proposals.

Applicant's proposals must reach the PMU at the address below, at the very latest, by the date and time indicated in the call for proposals. Address for delivery:

**Attention: PSDP Project Management Unit  
Jamaica Promotions Corporation (JAMPRO)  
18 Trafalgar Road  
Kingston 10**

Applicants are required to sign a document receipt register once they have delivered proposals to the PMU.

Applicants must also provide a sworn statement on the application form that they are not excluded under the conditions laid out at 2.3.3 above, by completing Part B of the application form.

They must also include with their application all supporting documents outlined on the application form.

## 2.6 Clarification

Approximately, three weeks after the issue of the call for proposals, i.e. ***Wednesday, July 20 at 9:00 am to 12:00 pm, a clarification meeting will be held at JAMPRO chaired by the PMU*** at which potential applicants will be able to seek clarification on any part of the application procedure.

During the time between the publication of the call for proposals and up to 21 days prior to the deadline for submission of proposals, applicants will be able to submit questions of substance in writing, either via email to [psdpinfo@jamprocorp.com](mailto:psdpinfo@jamprocorp.com), by post/hand-delivery, fax or online, through the PSDP website. The PMU will respond to all such questions, on the Friday of each week up until 11 days before the deadline for submission of proposals. In the interest of transparency and equal treatment, the response provided to one applicant on points which may be of interest to other

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applicants will be made available via the JAMPRO web site at [www.investjamaica.com/psdp/](http://www.investjamaica.com/psdp/). Hard copies of the responses will also be made available by the PMU and can be collected by the applicant.

### 2.7 Evaluation and Selection

Potential applicants will be given 60 days from the first date of publication of the call for proposals notice, to prepare their proposals. This is in accordance with the minimum period outlined under the 9<sup>th</sup> European Development Fund (EDF) procedures.

All proposals submitted in response to the call for proposals by the deadline date will be opened at a special session held the day after the closing date for submissions.

The proposals will be evaluated by independent assessors commissioned by the PMU and/or by officers within the PMU. The assessors will check all applications, initially for compliance with the call for proposals and then for eligibility of applicants. Proposals that pass the initial assessment will then be evaluated technically and ranked according to the best scores within the limits of the funds available under the call for proposals. The technical evaluation will review (i) the PSOs financial and operational capacity, (ii) the relevance of the proposal to the overall objective of the PSDP and the specific objective of the call for proposals, (iii) the methodology to be used, (iv) the sustainability of the action and (v) the budget and cost-effectiveness of the proposals.

The assessors will compile a report outlining their recommendations, which will be presented to an Evaluation Committee comprising of five members of the PSDP Steering Committee, for their endorsement.

Proposals that achieve an acceptable score will be funded in descending score sequence until all the funds have been disbursed. Any remaining funds will be disbursed via subsequent calls for proposals until exhausted.

**Annexes 3 and 4** contain a copy of the administrative compliance and evaluation grids, respectively, that will be used by assessors and the Evaluation Committee when evaluating proposals. The entire evaluation process, from the deadline for the submission of applications/proposals to the award of grant contracts, takes approximately 4 weeks.

### 2.8 Notification of evaluation results

Once the Evaluation Committee has completed evaluating the recommendations of the Assessors and produced a final evaluation report all applicants will be informed whether or not their applications have been successful or not.

### 2.9 Grant Contract

A contract will be drawn up with successful applicants for the implementation of activities over a 9-month period commencing September 2005. Upon the signing of this contract and submission of a request for payment, an advance of up to 25% of the PSDP's contribution can be paid to the beneficiary to commence this action. If an advance is requested, a financial guarantee for this amount will be required prior to payment. The financial guarantee should be prepared using the prescribed model provided in **Annex 5**. Alternatively, the beneficiary may opt to self-finance approved activities and submit requests for reimbursement of expenditure based on supporting documents outlined in the contract. In cases where self-financing is used, **a financial guarantee will not be required**. A third option involves the PSDP making direct payments to suppliers once the beneficiary has spent their 25% contribution and has provided the relevant supporting documentation described in the contract.

The PSDP will effect a maximum of 5 payments per grant contract i.e. 4 interim payments and one final payment. The beneficiary will submit interim reports according to the prescribed format to receive payment. A final report outlining activities completed, deliverables and results must be submitted prior to final payment.

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If the Beneficiary fails to supply the PMU with a final report by the deadline laid down in the contract and fails to furnish an acceptable and sufficient written explanation of the reasons why he/she is unable to comply with this obligation, the PMU may terminate the Contract and recover the amounts already paid and not substantiated.

### **2.10 Contract amendments**

Any amendment to the Contract, including the annexes thereto, must be set out in writing in an addendum.

If an amendment is requested by the Beneficiary, he must submit that request to the Contracting Authority (the PMU) one month (30 days) before the date on which the amendment should enter into force, unless there are special circumstances duly substantiated by the Beneficiary and accepted by the Contracting Authority (the PMU).

However, where the amendment does not affect the basic purpose of the Action and the financial impact is limited to a transfer within the same budget heading, or a transfer between budget headings involving a variation of 15% or less of the amount originally entered under each relevant heading for eligible costs, the Beneficiary may apply the amendment and inform the Contracting Authority (the PMU) accordingly in writing. This method may not be used to amend the heading for administrative costs.

Changes of address, changes of bank account and changes of auditor may simply be notified in writing, although this does not preclude the Contracting Authority from opposing the Beneficiary's choice of bank account or auditor.

An addendum may not have the purpose or the effect of making changes to the Contract that would call into question the grant award decision or be contrary to the equal treatment of applicants. The maximum grant referred to in the contract may not be increased.

### **2.11 Audit**

The Beneficiary will allow the PMU, the Planning Institute of Jamaica, the European Commission, the European Anti-Fraud Office and the European Court of Auditors to verify, by examining the documents, or by means of on-the-spot checks, the implementation of the Action and conduct a full audit, if necessary, on the basis of supporting documents for the accounts, including accounting documents and any other document relevant to the financing of the Action. These inspections may take place up to 7 years after the payment of the balance.

Furthermore, the Beneficiary will allow the PMU and/or European Anti-Fraud Office to carry out checks and verification on the spot in accordance with the procedures set out in the European Community legislation for the protection of the financial interests of the European Communities against fraud and other irregularities. To this end, the Beneficiary undertakes to give appropriate access to staff or agents of PMU, the European Commission, of the European Anti-Fraud Office and of the European Court of Auditors to the sites and locations at which the Action is implemented, including its information systems, as well as all documents and databases concerning the technical and financial management of the Action and to take all steps to facilitate their work. Access given to agents of the PMU, the European Commission, European Anti-Fraud Office and the European Court of Auditors shall be on the basis of confidentiality with respect to third parties, without prejudice to the obligations of public law to which they are subject. Documents must be easily accessible and filed so as to facilitate their examination and the Beneficiary must inform the PMU of their precise location.

The documents will include (where applicable):

- a. Works, supplies and services

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- Bids from suppliers;
- Contracts and order forms;
- Invoices and proofs of payment or settled invoices; if supplies come from the Beneficiary's stocks, invoices shall reflect the price paid at the time of purchase. A copy of the purchase invoice must be attached;
- For fuel and oil the Beneficiary shall keep a summary list of the distance covered, the average consumption of the vehicles used, fuel costs and maintenance costs.

b. Staff costs:

- A statement of expenditure on local staff recruited on fixed-term contracts, with details of remuneration paid, duly substantiated by the person in charge locally, broken down into gross salary, social security charges, insurance and net salary as well as copies of pay slips;
- A statement of expenditure on expatriate and/or European-based staff (if the Action is implemented in Europe) per month of actual work; expenditure will be assessed on the basis of unit prices per verifiable block of time worked and broken down into gross salary, social security charges, insurance and net salary.