Chapter 24

PREPARATION OF THE INSTRUCTIONS TO OFFERORS

1. SIGNIFICANCE OF THE INSTRUCTIONS TO OFFERORS

Although in the customary sequence of preparing the solicitation documents this material is drawn up last, instructions to offerors is the first document to be read by offerors.

Its main purpose is to give unambiguous guidance about the solicitation procedure by providing a brief executive summary of the project, then explaining the
- classification and marking, if any, of clauses;
- eligibility of offerors;
- clarification of the content of the solicitation documents;
- preparation of responsive offers;
- submission of offers;
- evaluation and clarification of offers; and
- award of contract.

It is vitally important to establish clear rules in order to avoid uncertainties or disputes while conducting the procurement procedure. The most helpful arrangement for explaining what offerors should do and how is to follow the chronological order of foreseen events.
2. **TYPICAL CONTENT OF INSTRUCTIONS TO OFFERORS**

As discussed in *Standardised versus Bespoke Solicitation Documents* (page 309), quite a few IFIs and other international organisations have developed their own sample or standard instructions to offerors, that are well proven and widely used by the procuring entities' community.

In compliance with the above-explained main purpose of instructions to offerors, Table 24-1. shows the table of contents of an example Instructions to Bidders, prepared as a skeleton for compiling a bespoke version for tendering procedures. Titles have been marked as explained in *Categorisation and Marking of Clauses* (page 242).

Since the last phase of preparing the solicitation documents is the compilation of instructions to bidders/participants, before discussing some practical considerations of the actual conduct of project procurement procedures it is worthwhile

- to address those clauses which have not been dealt with so far; and
- to link other clauses with the previously discussed relevant principles.

3. **TYPICAL ENCLOSURES AND REQUESTS**

According to the principles spelled out in *Splitting to Body Text and Attachments* (page 234), enclosures of the instructions to offerors specify details to be considered by offerors. Since the instructions to offerors serves as a general guide for preparing the offers – covering all other attachments beyond the enclosures, too - usually it contains all requests for compiling such attachments for which there is no dedicated form or description anywhere else in the solicitation documents.