INTEGRITY PACTS EU'S IMPACT CASE 08

PORTUGAL - RENOVATION OF THE ALCOBAÇA MONASTERY

ONE REVIEW ROUND. TWO TENDERS IMPROVED.

CONTRACTING PROJECT INFORMATION

Country	Portugal
Project	Renovation of the Alcobaça monastery (PT)
Project description	Conservation and renovation work at the Alcobaça Monastery, a UNESCO World Heritage site, in Portugal. It contemplates work aiming to preserve the west and north facades of the building, as well as renovating the entrance portico and its visitor's shop.
IP signature date	11/12/2018
Contracting authority	Direção Geral do Património Cultural (Directorate General of Cultural Heritage, DGCH)
Managing authority	Comissão de Coordenação e Desenvolvimento Regional do Centro (Centro Regional Coordination and Development Commission)
Monitoring organisation	Transparência e Integridade, Associação Cívica (Transparency International Portugal)
Procedures monitored	2
Contracts awarded	2
Current stage	Implementation
Impact case categories	(1) **Promote better value for money** (2) Enhance transparency and accountability (3) **Foster project timeliness** (4) Increase access and participationof citizens (5) Encouragecompetition and fairness (6) Support institutional changes

IMPACT CASE

Portugal's Directorate General of Cultural Heritage (DGCH) is the government entity responsible for managing the country's architectural heritage. It guards buildings with historical, artistic, or scientific value, some of which also host cultural venues such as museums. Therefore, DGCH invests on a regular basis in maintenance, renovation and preservation works. Most of the time, these imply contracting external and specialised services.

DGCH sought to integrate an Integrity Pact (IP) in their procurement processes and review how it could enhance transparency and accountability. They were also interested in exploring whether it would achieve better value for money, as the budget allocated for its work tends to be limited and highly dependent on EU funds.

Transparency International Portugal joined DGCH in the IP as the independent monitor, and in a short time set up a collaborative and trusting relationship. TI Portugal had the opportunity to observe and support DGPC starting with the process of securing EU funds and took part in the discussions about which project would benefit from the monitoring. In the end, the contracting authority and the monitor agreed on conservation and renovation works at the Alcobaça Monastery, a UNESCO World Heritage site, in the region of Centro. The project was split into two interventions, one focusing on conservation works of the site's west and north façades (MA01) and the other on the renovation of the monastery's entrance and the museum's shop (MA02).

DGCH's team of experts had already devised the renovation plans for the Monastery, so the works to translate them into a contracting project started soon. The MA02 intervention was the first one to be developed. TI Portugal reviewed the tendering documentation and provided a set of recommendations that was later turned into different adjustments, including:

- **Reviewing the criteria to define the price and cost of the intervention** based on the analysis of similar contracts performed in the last three years.

- **Clarifying the deadline for the execution of the works**, in line with the country's public procurement code.

- **Limiting the possibility of replacing technical staff** nominated as part of the original proposal to prevent bidders from proposing experts without having a formal collaboration agreement or contract.

- Including **criteria for awarding the contract in case of a tie-break**. The criterion set was a lottery method.

When reviewing the second intervention's tender documentation (MA01), TI Portugal observed that the changes previously discussed were implemented in this tender as well. The benefits of proposed adjustments, therefore, were carried over to the second procedure, keeping the quality and consistency of the supporting documentation and speeding up the tendering process. Moreover, these recommendations had also an effect on the development and supervision of the construction works, in line with DGCH's expectations and the overall impact foreseen for the monastery.

Thanks to the Integrity Pact implemented on the renovation of the Alcobaça Monastery in Portugal, the monitoring mechanism allowed to improve tendering documentation, **promoting better value for money** and **fostering project timeliness**.

Funded by the European Union