

# FINDING BUSINESS OPPORTUNITIES

And Winning Contracts Financed  
by the World Bank

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# Common Abbreviations and Defined Terms

This section explains the common terms and abbreviations used in this Guidance. Defined terms are written using capital letters.

Abbreviation/Term	Full terminology/Definition
<b>BAFO</b>	Best and final offer.
<b>Bid</b>	An offer, by a firm or joint venture, in response to a Borrower's Request for Bids, to provide the required Goods, Works or Non-consulting Services.
<b>Bidder</b>	A firm or joint venture that submits a Bid.
<b>Borrower</b>	A Borrower or recipient of World Bank Investment Project Financing (IPF) and any other entity involved in the implementation of a project financed by IPF.
<b>Business Day</b>	Any day that is an official working day of the Borrower. It excludes the Borrower's official public holidays.
<b>Buyer</b>	When the procurement is undertaken by Borrower in relation to a World Bank-financed project, the Buyer is the Borrower's implementing agency.  When the World Bank Group (WBG) is buying for its own use, the Buyer is the WBG, and the procurement is done by the WBG's Corporate Procurement team.
<b>Consultant</b>	A private or public entity, joint venture, or individual that provides services of an advisory or professional nature. Where the Consultant is an individual, they are not engaged as an employee.
<b>Consulting Services</b>	Covers a range of services that are of an advisory or professional nature and are provided by Consultants.  These Services typically involve providing expert or strategic advice e.g., management consultants, policy consultants or communications consultants. Advisory and project related Consulting Services include, for example: feasibility studies, project management, engineering services, finance and accounting services, training and development.
<b>Core Procurement Principles</b>	The Bank's Core Procurement Principles (value for money, economy, integrity, fit-for-purpose, efficiency, transparency and fairness) as detailed in Section III. C of the <a href="#">Bank Policy: Procurement in IPF and Other Operational Procurement Matters</a> .
<b>Corporate Procurement</b>	Procurement undertaken by the WBG's Corporate Procurement team when the WBG is buying for its own use. The term also refers to the WBG's internal procurement team and the processes used when making such purchases.

Abbreviation/Term	Full terminology/Definition
<b>Country Partnership Framework (CPF)</b>	A Country Partnership Framework identifies the key objectives and development results through which the World Bank intends to support a member country in its efforts to end extreme poverty and boost shared prosperity in a sustainable manner. A CPF is the central tool used by World Bank Management and the Board for reviewing and guiding its country programs and gauging their effectiveness.
<b>Direct Payment</b>	This is a disbursement method that facilitates payments directly from the Bank to a Borrower's supplier, contractor, or consultant.
<b>E&amp;S</b>	Environmental and Social.
<b>ESCP</b>	Environmental and Social Commitment Plan.
<b>Environmental and Social Framework (ESF)</b>	The World Bank's Environmental and Social Framework consists of a vision for sustainable development; ten Environmental and Social Standards, which set out the requirements that apply to Borrowers when implemented IPF projects.
<b>Environmental and Social Standards (ESS)</b>	The ten Environmental and Social Standards which form an integral part of the World Bank's Environmental and Social Framework. These standards set out the requirements that apply to Borrowers when implementing IPF projects.
<b>Evaluation Criteria</b>	Price and non-price criteria, including Rated Criteria when applicable, that define how the Borrower evaluates which Bid or Proposal is the Most Advantageous Bid or Proposal.
<b>Goods</b>	A category of procurement that includes commodities, raw material, machinery, equipment, vehicles, Plant, and related services such as transportation, insurance, installation, commissioning, training, and initial maintenance.
<b>GPN</b>	General Procurement Notice.
<b>Green, Resilient, and Inclusive Development (GRID)</b>	The Bank's strategy for responding to global economic and climate impacts by promoting economic growth that goes hand in hand with environmental goals and social inclusion.
<b>HEIS</b>	Hands-on Expanded Implementation Support
<b>IBRD</b>	International Bank for Reconstruction and Development.
<b>ICSID</b>	International Centre for Settlement of Investment Disputes.
<b>IDA</b>	International Development Association.
<b>Independent Evaluation Group (IEG)</b>	The World Bank's Independent Evaluation Group evaluates the development effectiveness of World Bank-funded projects. IEG is independent of the Management of the World Bank and reports directly to the Executive Board.
<b>IFB</b>	Invitation for Bids.
<b>IFC</b>	International Finance Corporation.
<b>Investment Project Financing (IPF)</b>	Bank Loans and Bank Guarantees provided by the World Bank to Borrowers to support Projects with defined development objectives, activities, and results.  Disbursements are made against specific eligible expenditures.
<b>ITB</b>	Invitation to Bid.

Abbreviation/Term	Full terminology/Definition
<b>Most Advantageous Bid or Proposal (MABP)</b>	The Bid or Proposal where the Bidder or Proposer meets the qualification criteria, and the Bid or Proposal has been determined to be substantially responsive to the RFB or RPF, and has been evaluated as the highest-ranked Bid or Proposal. The contract is awarded to the Bidder or Proposer with the MABP.
<b>MIGA</b>	Multilateral Investment Guarantee Agency.
<b>Non-consulting Services</b>	Services which are not Consulting Services. Non-consulting Services are normally bid and contracted on the basis of performance of measurable outputs, and for which performance standards can be clearly identified and consistently applied. Examples include drilling, aerial photography, satellite imagery, mapping, and similar operations.
<b>Notification of Intention to Award</b>	The notice transmitted by the Borrower to all Bidders, Proposers or Consultants that submitted Bids or Proposals informing them of the Borrower's intention to award the contract.
<b>OPCS</b>	Operations Policy and Country Services is the Bank's Vice Presidency which incorporates the office of the Chief Procurement Officer and procurement team that manages the World Bank's Procurement Framework.
<b>Operations Procurement</b>	Procurements financed under IBRD or IDA loans, using the World Bank's Procurement Regulations led by a Borrower's implementing agency.
<b>PAD</b>	Project Appraisal Document.
<b>PID</b>	Project Information Document.
<b>Plant</b>	The provision of equipped facilities, such as facilities contracted based on e.g., design, supply, build, install and/or commission.
<b>PPSD</b>	Project Procurement Strategy for Development.
<b>Procurement Documents</b>	A generic term used in the Procurement Regulations to cover all Procurement Documents issued by the Borrower to potential Applicants/Bidders or Proposers. These includes GPN, SPN, REoI, prequalification document, initial selection document, RFBs, RFPs, and forms of contracts and addenda.
<b>Procurement Regulations</b>	The World Bank's <a href="#">Procurement Regulations</a> for Investment Project Financing. These Regulations set the rules for management of World Bank-financed procurement projects.
<b>Project Cycle</b>	The World Bank's framework to design, prepare, implement, and supervise IPF-funded projects.
<b>Proposal</b>	An offer, in response to a Request for Proposals, which may or may not include price, by one party to provide Goods, Works, Non- Consulting Services or Consulting Services to another party.
<b>Proposer</b>	A firm or joint venture that submits a Proposal.
<b>Rated Criteria</b>	Rated Criteria are qualitative measures used to evaluate non-price attributes of Bids and Proposals, such as quality of the methodology or work plan, identification and mitigation of risks, opportunities for innovation including improvements in design, functionality or performance, approaches to achieving sustainability, and other technical aspects. Rated Criteria are weighted and scored.

Abbreviation/Term	Full terminology/Definition
<b>Request for Bids (RFB)</b>	Request for Bids is a competitive method for the solicitation of Bids. It is used when, due to the nature of the Goods, Works, or Non-consulting Services to be provided, the Borrower is able to specify detailed requirements to which Bidders are required to respond in offering their Bids.
<b>Request for Proposals (RFP)</b>	Request for Proposals is a competitive method for the solicitation of Proposals. It is used when, due to the nature and complexity of the Goods, Works, or Non-consulting Services to be procured, the Borrower's business needs are better met by allowing Proposers to offer customized solutions or Proposals that may vary in the manner in which they meet or exceed the requirement of the RFP.
<b>Request for Quotations (RFQ)</b>	Request for Quotations is a competitive method that is based on comparing price quotations from firms.
<b>Seller</b>	A generic term used in this guidance to mean any supplier, contractor, firm, consultant or non-government organization interested in winning contracts let by Borrowers in relation to World Bank-financed projects or selling directly to the World Bank Group.
<b>Services</b>	Performance of an identifiable task/s rather than provision of Goods or Works. This includes a wide range of Consulting and Non-consulting services.
<b>SPN</b>	Specific Procurement Notice.
<b>Standard Procurement Documents (SPDs)</b>	Procurement documents issued by the Bank to be used by Borrowers for IPF financed projects. These include, GPN, SPN, REoI, Standard Prequalification documents, Initial Selection documents, RFBs, RFPs.
<b>Standstill Period</b>	A period of at least ten business days following transmission of the Notification of Intention to Award and before the Award of Contract takes place.
<b>State-Owned Enterprise (SOE)</b>	A legal entity that is created by a government in order to participate in commercial activities on the government's behalf. It can be either wholly or partially owned by the government.
<b>TL</b>	World Bank role of Task Leader.
<b>Task Team</b>	A World Bank team, headed by a Task Leader, which comprises procurement-accredited staff, and is responsible and accountable for project-level procurement support and procurement monitoring activities provided to Borrowers.
<b>Third Party</b>	A legal entity, including a vendor, supplier, public or private entity, and its affiliates, that directly or indirectly (for example, through an affiliate, prime contractor, or subcontractor) submits offers or enters into contracts with WBG for the provision of Goods, Services or Works.
<b>UNDB</b>	United Nations Development Business.
<b>VfM</b>	Value for Money.
<b>Works</b>	A category of procurement that refers to construction, repair, rehabilitation, demolition, restoration, maintenance of civil work structures, and related services such as transportation, insurance, installation, commissioning, and training.
<b>World Bank</b>	The World Bank comprises two WBG institutions, namely International Bank for Reconstruction and Development (IBRD), which assists middle-income and creditworthy poorer countries, and the International Development Association (IDA), which focuses on the world's poorest countries.
<b>World Bank Group (WBG)</b>	The World Bank Group consists of five institutions, IBRD, IDA, IFC, MIGA and ICSID.

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# Business Opportunities

## Introduction

Securing a contract financed by the World Bank or the World Bank Group (WBG) can be a great way to expand your business, build international experience and make a positive contribution to global development outcomes. Both the World Bank and WBG present a variety of business opportunities for a diverse range of Sellers. Understanding how they are structured and operate will increase your chances of identifying the right business opportunities and winning contracts.

This Guidance is written for any Seller (supplier, contractor, firm, consultant or non-government organization) interested in winning contracts let by Borrowers in relation to World Bank-financed development projects, and/or interested in selling directly to the WBG.

## Two Types of Business Opportunities

This Guidance describes the two types of business opportunities that are available to Sellers, namely, Operations Procurement (World Bank-financed) and Corporate Procurement (WBG procurement).

### 1. Operations Procurement (World Bank) – An Overview

Operations Procurement consists of procurements undertaken by Borrowers in relation to the implementation of international development projects financed by the World Bank. Finance is provided to Borrowers (World Bank clients), through Investment Project Financing (IPF). In Operations Procurement the Borrower is the Buyer, not the World Bank.

More information in this Guidance is provided at:

**Section III.** Operations Procurement – Investment Project Financing

**Section IV.** Operations Procurement – Finding Business Opportunities

**Section V.** Operations Procurement – Policy, Principles & Regulations

**Section VI.** Operations Procurement – Process Overview

**Annex A** – Operations Procurement – Tips for Bidding

**Annex B** – Operations Procurement – Checklists

**Annex C** – Operations Procurement – Who's Who

## 2. Corporate Procurement (WBG) – An Overview

Corporate Procurement consists of procurements undertaken by the WBG when it is buying for its own use.

Corporate Procurement opportunities arise when the WBG wishes to purchase Goods, Works, or Services it needs in order to operate. These include, for example, Consulting Services to support the WBG's lending operations. In Corporate Procurement the WBG is the Buyer. This procurement is handled by the WBG's Corporate Procurement team, with some contracting being done by in-country WBG office staff.

Corporate Procurement has its own procurement policies and procedures which are separate and different to Operations Procurement.

More information in this Guidance on Corporate Procurement is provided at:

**Section VII.** Corporate Procurement

**Annex D** – Corporate Procurement – What we Buy

**Annex E** – Corporate Procurement – Tips for Bidding

**Annex F** – Corporate Procurement – Who's Who

## Overview of the World Bank

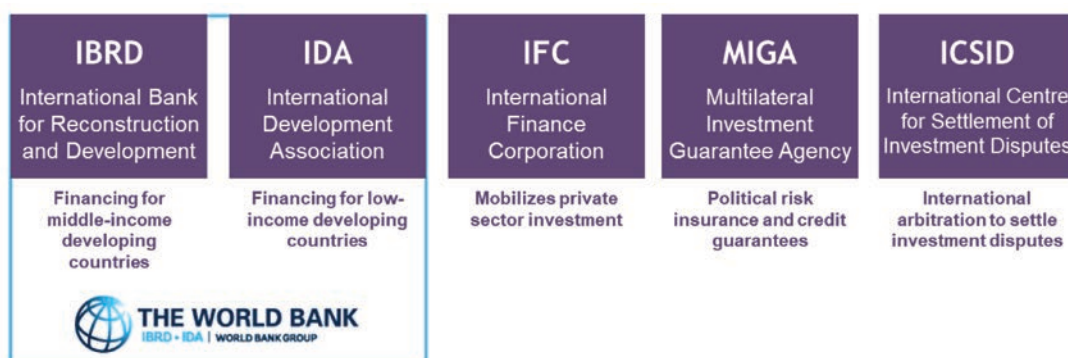
### History

The World Bank was established in 1944 to help rebuild Europe after World War II. Since then, it has developed into one of the largest international development organizations.

### World Bank Group

The WBG is a unique global partnership comprising five institutions (listed in Figure I) with a shared vision to, “create a world free of poverty on a livable planet.” This vision is supported by its mission “to end extreme poverty and boost prosperity on a livable planet.”

**FIGURE I** The Five World Bank Group Institutions



The WBG has 189 member countries, staff from more than 170 countries, and offices in over 130 locations.

While the five institutions have their own country membership, governing boards, and articles of agreement, the WBG acts as one to serve its partner countries. Today’s development challenges can only be met if the private sector is part of the solution. But the public sector sets the groundwork to enable private investment and allow it to thrive. The complementary roles of the WBG’s five institutions give the WBG a unique ability to connect global financial resources, knowledge, and innovative solutions to the needs of developing countries.

## Comparative Advantage

The comparative advantage of the WBG is its ability to work with different stakeholders. This ability comes from the powerful combination of country depth and global breadth, public and private sector instruments and relationships, multisector knowledge, and the ability to mobilize and leverage financing.

### Partnering with Governments

Together, IBRD and IDA form the World Bank, which provides financing, policy advice, and technical assistance to governments of developing countries.

### Partnering with the Private Sector

IFC, MIGA, and ICSID focus on strengthening the private sector in developing countries. Through these institutions, the WBG provides financing, technical assistance, political risk insurance, and settlement of disputes to private enterprises, including financial institutions.

## World Bank

The World Bank (as opposed to the WBG), comprises two WBG institutions, namely IBRD and IDA.

### World Bank Institutions - IBRD and IDA

#### IBRD - International Bank for Reconstruction and Development

IBRD is a global development cooperative owned by its 189 member countries. As the largest multilateral development bank in the world, it supports the WBG's mission by providing loans, guarantees, risk management products, and advisory services to middle-income and creditworthy low-income countries, as well as by coordinating responses to regional and global challenges.

#### IDA - International Development Association

IDA is the world's largest multilateral source of concessional financing for the poorest countries. It provides concessional development credits, grants, and guarantees to support these countries' efforts to increase economic growth, reduce poverty, and improve the living conditions of the poor.

## Management Structure

The World Bank is like a cooperative, made up of 189 member countries. These member countries, or shareholders, are represented by a Board of Governors, who are the ultimate policymakers at the World Bank. Generally, the governors are member countries' ministers of finance or ministers of development. They meet once a year at the Annual Meetings of the Boards of Governors of the WBG and the International Monetary Fund.

The World Bank operates day-to-day under the leadership and direction of the president, management and staff, and vice presidents in charge of Global Practices, Cross-Cutting Solutions Areas, regions, and functions.

The Board appoints the President, who chairs meetings of the Board and is responsible for overall management of the World Bank. The Board delegates specific duties to 25 Executive Directors, who work on-site at the World Bank. The Executive Directors normally meet twice a week to oversee the World Bank business, including approval of loans and guarantees, new policies, the administrative budget, country partnership frameworks and borrowing and financial decisions.

Operations are organized by place (region), and subject (Global Practice, function or Cross Cutting Solution Areas). This is managed through Vice Presidents in charge of Global Practices, Cross-Cutting Solutions Areas, regions, and functions.

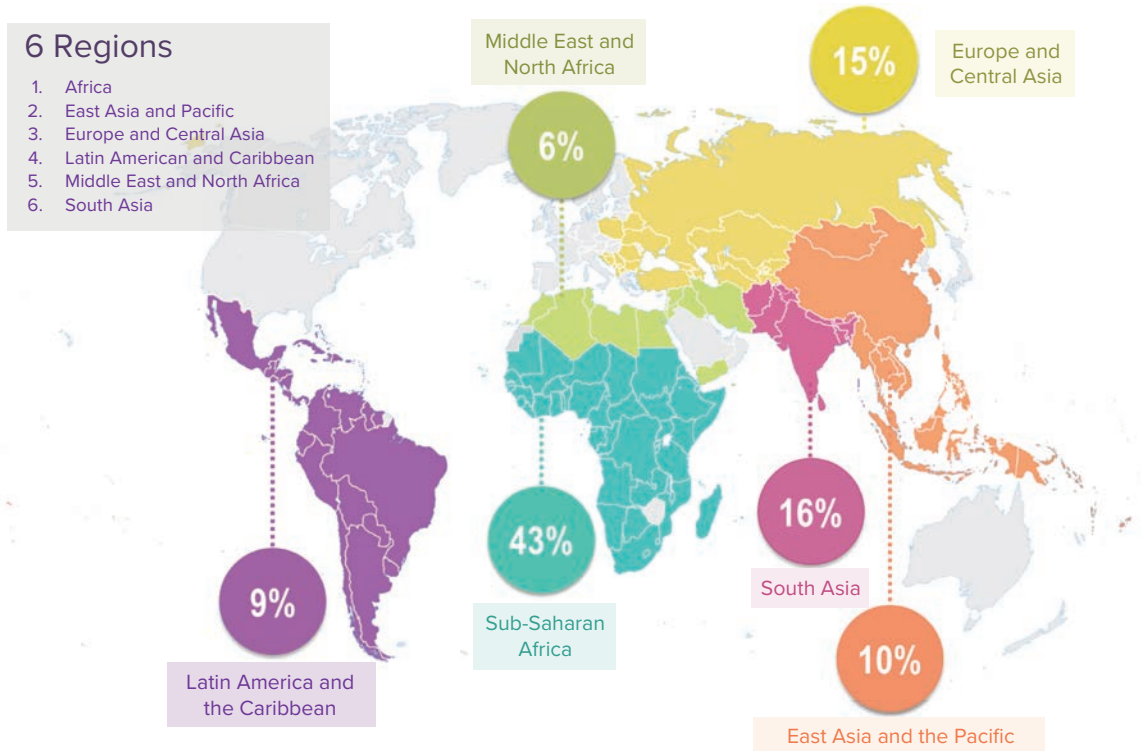
## Purpose

The World Bank provides Investment Project Financing (IPF) to governments of developing countries. These primarily fund capital programs. In addition, the World Bank provides policy advice, and technical assistance to support governments when implementing development projects. The World Bank's assistance plans are based on poverty reduction strategies. From an extensive analysis of a country's financial and economic situation each country identifies its priorities and targets for the reduction of poverty and national development in a Country Partnership Framework.

## Regions

The World Bank's operations are divided into six geographic regions. Figure II. illustrates the regions and the percentage of World Bank global financial commitments by region (data February 2023).

**FIGURE II** World Bank Geographic Regions





# Operations Procurement – Investment Project Financing

## Investment Project Financing (IPF)

World Bank financing for Operations Procurement is provided to countries through Investment Project Financing (IPF). This can take the form of an IBRD loan or IDA credit or grant.

Unlike commercial lending, World Bank IPF not only supplies Borrowers with the required financing, but also serves as a vehicle for sustained, global knowledge transfer and technical assistance. This includes wrap around support in analytical and design work at the conceptual stages of project preparation, technical support and expertise during implementation (including in the areas of project management and fiduciary and safeguards activities), and institution building throughout the project.

## Role of World Bank in IPF

The World Bank is required, as part of its fiduciary responsibilities, to ensure that Bank-financing is used only for the purpose/s for which it was granted. In discharging this responsibility, the World Bank's oversight includes Task Teams providing Borrowers with procurement implementation support, supervision and monitoring for each project.

Under this regular implementation support, the World Bank provides procurement advice and oversight to Borrowers through Bank reviews (prior and/or post reviews), supervision, independent procurement reviews, training, and other fiduciary mechanisms appropriate to the project and/or portfolio-specific risk/s.

## Bank Reviews

Part of discharging its fiduciary responsibilities involves the World Bank conducting reviews of selected procurement activities undertaken by Borrowers.

A review may be either:

1. prior review: while the procurement activity is taking place, or
2. post review: after the procurement activity has been completed.

The purpose of the World Bank's review is to determine the extent to which the Borrower's procurement activities are in accordance with the financing agreement for the project, including the World Bank's

procurement policies and *Procurement Regulations*, which are incorporated by reference in the financing agreement. The Procurement Plan specifies whether a procurement is subject to prior or post review. The World Bank requires mandatory prior review where the value of the procurement is above certain thresholds. These thresholds are detailed in Annex I of World Bank's Procurement Procedure.

### *Prior Review*

For procurements subject to prior review, the World Bank reviews:

1. Project Procurement Strategy for Development (PPSD) and Procurement Plan for the project
2. draft General Procurement Notice (GPN) and Specific Procurement Notices (SPN) before they are published
3. Borrower's draft Procurement Documents before they are issued to Bidders or Proposers
4. results of the evaluation of Bids or Proposals before they are communicated to the Bidders or Proposers
5. Borrower's draft responses to procurement-related complaints before they are issued to the complainant
6. draft contracts before they are signed by the Borrower.

### *Post Review*

For procurements subject to post review, the Borrower conducts the procurement process and the World Bank, on a sample basis, reviews the process to determine whether it has been conducted in accordance with the financing agreement and the World Bank's *Procurement Regulations* and Policy.

## Expanded Borrower Support

In addition to the World Bank's regular implementation support and oversight, the World Bank may agree to provide Hands-on Expanded Implementation (HEIS) where it determines that expanded support is needed to assist the Borrower to achieve the development objectives and outcomes of the project. The scope and nature of HEIS is determined by the World Bank on a case-by-case basis. HEIS does not result in the World Bank executing procurement on behalf of the Borrower, and all project execution remains the Borrower's responsibility.

HEIS allows World Bank Task Teams to provide expanded assistance in developing effective project-specific procurement processes. Providing HEIS during the procurement process helps accelerate implementation and fosters greater levels of skills transfer, as the Task Team and Borrower's staff work more closely together. HEIS may also expedite execution of supplier selection and project delivery, potentially encouraging more businesses to bid. It can be especially effective in improving project quality in lowest-capacity situations.

## World Bank Project Cycle

To understand how business opportunities arise in Operations Procurement, it is helpful to be familiar with the World Bank's [Project Cycle](#). The Project Cycle is the framework used to design, prepare, implement, and supervise IPF projects.

In practice, the World Bank and the Borrower work closely throughout the project cycle, although they have different roles and responsibilities. The World Bank's Project Cycle consists of six stages, as represented in Figure III.

**FIGURE III** World Bank Project Cycle



### The Six Stages of the Project Cycle

#### 1. Identification

The task of identifying and proposing projects for World Bank financing lies mainly with the Borrower. Key steps include:

- a. The Borrower and the World Bank produce a Country Partnership Framework (CPF) to identify the country's main priorities for ending extreme poverty and promoting shared prosperity.
- b. Once a project is identified, the Borrower and the World Bank agree on an initial project concept and its beneficiaries, and the World Bank's project team outlines the basic elements in a Project Concept Note. This document identifies proposed objectives, risks to achieving these objectives, alternative scenarios, and an indicative timetable for project preparation processes.

- c. Two World Bank documents are prepared and disclosed to the public during this phase.
  - i. Project Information Document (PID) which outlines the scope of the intended project
  - ii. Environmental and Social Review Summary for investment projects that apply the Environmental and Social Framework (ESF).

## 2. Preparation

The Borrower is responsible for the project preparation phase, which includes conducting technical, economic, social and environmental assessments and preparing feasibility studies, engineering and technical designs, among others. Borrowers may contract with consultants and private sector firms to support them during this phase. Key considerations include:

- a. During preparation, the Borrower and the World Bank's team give attention to other important concerns including citizen engagement, gender, climate change, fraud and corruption, and grievance redress mechanisms. Beneficiaries and stakeholders are also consulted during this phase to ensure the project considers their needs.
- b. The World Bank generally offers analysis and advice during this phase and supports the Borrower in developing the project design, identifying implementation arrangements, and conducting various reviews and studies.
- c. The World Bank assesses the relevant capacity of the Borrower's implementing agencies to reach agreement with the Borrower on arrangements for overall project management, such as the systems required for financial management, procurement, environmental and social risk management, reporting, and monitoring and evaluation.
- d. Earlier screening by the World Bank may have determined that a proposed project could have potential adverse environmental or social impacts. For new IPF projects, the World Bank applies the ESF and a set of Environmental and Social Standards (ESS) that are designed to support Borrowers to better manage environmental and social (E&S) risks.

## 3. Appraisal

The Borrower and the World Bank review the work done during the identification and preparation phases and confirm the expected project outcomes, intended beneficiaries, application of ESF requirements and evaluation tools for monitoring progress. Key steps include:

- a. The World Bank team confirms that all aspects of the project are consistent with all World Bank operations requirements, assesses the project's readiness for implementation, and that the Borrower has institutional arrangements in place to implement the project efficiently. Agreement is then reached on the viability of all aspects of the project.

- b. Agreement is reached on a project timetable and public disclosure of key documents. It's also an opportunity to identify any outstanding matters required for final World Bank approval.
- c. The Project Information Document and Environmental and Social Review Summary (for IPF) are updated and disclosed during this phase.

#### **4. Negotiation & Board Approval**

Once all project details are negotiated and accepted by the Borrower and the World Bank, the World Bank team finalizes the documents for submission to the World Bank's Board of Executive Directors for consideration and approval, as appropriate:

- a. Project Appraisal Document (PAD) for projects financed through IPF
- b. PAD for projects financed through Program-for-Results (PforR)
- c. Program Document for projects financed through Development Policy Financing (DPF)
- d. any other financial and legal documents, as required.

#### **5. Implementation & Support**

Project implementation is the responsibility of the Borrower. The World Bank's role is to provide effective implementation support to improve results, help manage risks, and increase institutional development.

With technical assistance and support from the World Bank, the Borrower:

- a. prepares the contract specifications for the project
- b. carries out all procurement of the agreed Goods, Works, Non-consulting or Consulting Services
- c. addresses any environmental and social impact mitigation set out in agreed E&S plans, including those described in the Environmental and Social Commitment Plan (ESCP).

Financial management and procurement specialists on the World Bank's project team ensure that adequate fiduciary controls on the use of project funds are in place. Changing circumstances, project delays and unexpected events can sometimes require adjustments to the project design, such as implementation arrangements or even objectives, resulting in a restructuring.

The Borrower's implementing agency reports regularly to the World Bank on project progress and results. The Borrower and the World Bank also join forces at least twice a year to prepare a review of project progress. Based on this review, the World Bank team prepares an Implementation Status and Results Report.

## 6. Completion and Validation & Evaluation

### Completion

When a project is completed and closed at the end of the loan disbursement period, the World Bank, with input from the Borrower and other stakeholders, compiles an Implementation Completion and Results Report. This report evaluates:

- a. the project's outcomes
- b. challenges, and lessons learned to determine what additional measures are needed to sustain the benefits derived from the project.

In addition, the evaluation team assesses how well the entire operation complied with the World Bank's operations policies and accounts for the use of World Bank resources.

### Validation & Evaluation

The World Bank's Independent Evaluation Group (IEG) evaluates the development effectiveness. IEG is independent of the Management of the World Bank and reports directly to the Executive Board. IEG conducts different types of evaluation, validation, and synthesis exercises. At the project cycle level, IEG validates 100% of the self-evaluations that World Bank operational teams conduct upon project completion. In addition, IEG conducts strategically selected project-level evaluations through Project Performance Assessment Reports.

## Project Cycle – Where Business Opportunities Arise

Understanding the steps in the Project Cycle (outlined in Figure IV), and the procurement activities undertaken by the Borrower at each stage, assists Sellers in identifying relevant and suitable business opportunities.

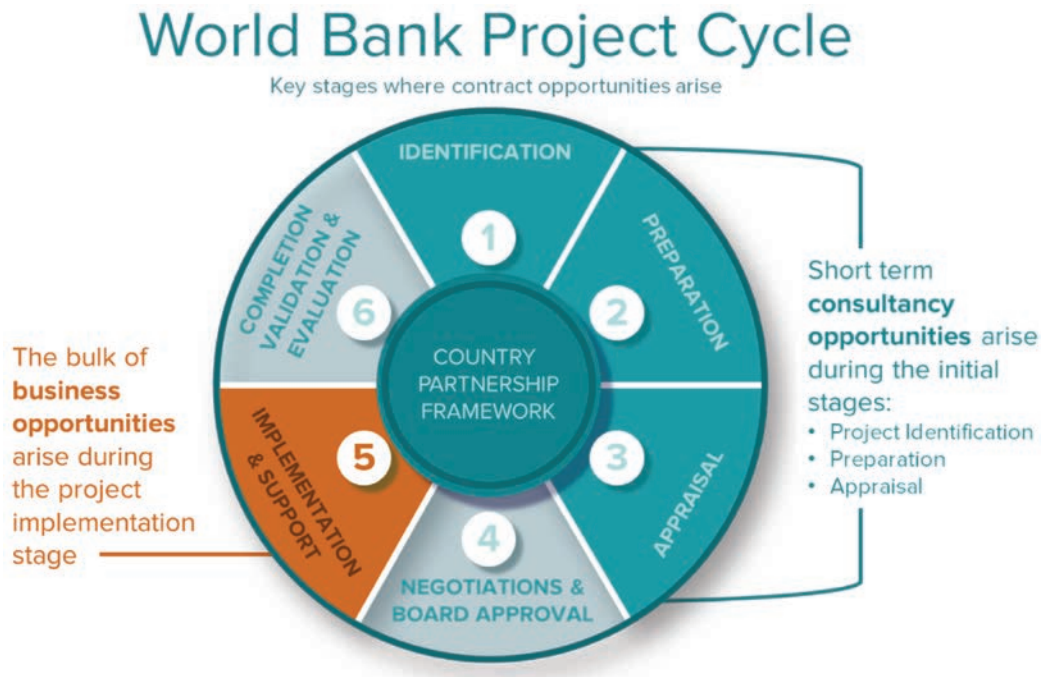
Operations Procurement business opportunities arise principally during the following stages:

1. **Project pipeline: Stages 1 to 3** – generally, Consulting Opportunities
2. **Project implementation: Stage 5** – Project Implementation and Support

### Project Pipeline – Stages 1 to 3 – Consulting Opportunities

The first three stages of the Project Cycle are collectively known as the “project pipeline.” This pipeline comprises projects at various stages of development, before obtaining World Bank approval for funding, and before undertaking project implementation procurement during Stage 5.

Consulting opportunities arise during the project Identification, Preparation and Appraisal stages. Consultants may be engaged directly by the World Bank to provide support to the Borrower or contracted by the Borrower.

**FIGURE IV** Business Opportunities Arising in the Project Cycle

Where the World Bank engages Consultants, depending on requirements, it is done through:

1. WBG's Corporate Procurement procedures, or
2. WBG's Human Resources function - where specialists are hired by the World Bank as individual Short-Term Consultants.

### Project Implementation and Support – Stages 5

The bulk of business opportunities arise at stage 5, Project Implementation and Support. At this stage, the Borrower undertakes procurements to implement the project. Depending on the nature of the project, this can generate a variety of large and small procurements to purchase Goods, Works, plant, equipment, Consulting and Non-consulting Services.

#### *Conflict of Interest*

It must be noted that Consultants engaged during the project pipeline stages may be precluded from being hired by the Borrower on the same project during Stage 5 due to possible conflict of interest or unfair advantage unless such conflict of interest or unfair advantage has been resolved in a manner satisfactory to the World Bank.





## Operations Procurement – Finding Business Opportunities

### Business Advantages

Operations Procurement projects themselves can be interesting, cover a wide variety of Goods, Works, Consulting and Non-consulting Services, and provide unique opportunities to support the delivery of the World Bank's development agenda.

Being awarded a World Bank-funded contract can be a good, lower risk way to enter a developing market, especially if you are new to working in the development sector or that country.

The types of business opportunities vary in scope, value and complexity and are suitable for delivery by a range of Sellers from SMEs through to large multi-national companies. Contracts are delivered across the globe and provide opportunities for both domestic and international Sellers. Contracts can be short, medium or long term.

The key benefits of selling to Operations Procurements are listed in Figure V.

**FIGURE V** Benefits of Selling to IPF-Financed Projects



## Search of Business Opportunities

It is important to target opportunities that reflect your business offering and identify the countries or regions where you have experience of working or are most interested in doing business. This will make it easier to search for relevant business opportunities and engage with the appropriate Borrower implementing agencies. Below are several suggested search options that will assist in developing a greater understanding of where and how the World Bank operates and where relevant business opportunities exist.

### Common Search Options

1	<b>By Areas of Specialization</b>	Search your specialization, expertise or area of practice against World Bank Global Practices.
2	<b>By Country or Region</b>	Narrow the search field to target countries and regions where the Bank works.
3	<b>World Bank Operations</b>	Search the Bank's Country Engagements, Projects and Operations.
4	<b>World Bank Apps</b>	a. Project Procurement App b. WBG FinancesOne c. Project Procurement Pipeline
5	<b>Procurement Notices</b>	a. UN Development Business b. World Bank Procurement Notices

Each of these common research options is described below. It's often best to pick more than one option to obtain the level of information required.

### 1 Search by Areas of Specialization

It is important to be clear about the specific area/s of specialization, expertise or practice your business offers. It is best to only target business opportunities that match.

It is possible to search World Bank data by areas of specialization. The World Bank's model is based on a matrix of 18 areas of specialization, known as Global Practices and 5 cross-cutting specializations known as Global Themes.

#### SEARCH FUNCTION

#### Areas of Specialization

Bank search engine: [World Bank Units](#)

#### World Bank Global Practices

- Agriculture
- Education
- Energy
- Environment & Natural Resources
- Extractive Industries
- Finance, Competitiveness & Innovation
- Governance
- Health, Nutrition & Population
- Human Development
- Jobs and Development
- Macroeconomics, Trade & Investment
- Poverty

- Social Protection
- Social Sustainability and Inclusion
- Urban, Disaster Risk, Resilience, and Land
- Transport
- Digital Development
- Water

#### World Bank Global Themes

- Climate Change
- Fragility, Conflict, and Violence
- Gender
- Infrastructure
- Knowledge Management

## 2 Search by Country or Region

You may have experience of working in a particular country or region, or you may be seeking to target opportunities arising in a specific country or region. The World Bank works in seven Regions and over 170 countries.

By researching countries and regions you can target projects in those geographic areas. You may also engage with the relevant Borrowers' implementing agencies, and the World Bank's regional or country offices.

SEARCH FUNCTION	
<p><b>Country or Region</b></p> <p>Bank search engine: <a href="#">Where We Work</a></p>	
<b>SEARCH by Region:</b>	use the drop-down pick list ' <b>Select a Region</b> '
<b>SEARCH by Country Group:</b>	use the drop-down pick list ' <b>Select a Country Group</b> '
<b>SEARCH by Individual Countries:</b>	use the alphabetical list across the top of the page " <b>ALL</b> " or click on a country listed below this band.

For example: a search by COUNTRY provides:

- country overview - context, strategy, results
- featured development stories and blogs
- statistics and interactive data sets
- list of all World Bank-funded projects, broken down:
  - geographically
  - by sectors
  - by themes
- interactive map showing all country projects, searchable by Global Practice subjects.

#### World Bank Regions

- Africa
- East Asia & Pacific
- Europe & Central Asia
- Latin America & the Caribbean
- Middle East & North Africa
- South Asia

#### Country Groups

- European Union
- Middle Income Countries
- Organization of Eastern Caribbean States
- Pacific Islands
- Small States
- Gulf Cooperations Council
- Western Europe

### 3 Search by World Bank Operations

It may be helpful to access more detailed information on World Bank operations. Here are two options, Country Engagement and Projects and Operations.

#### a. Country Engagement

The Country Engagement webpage provides information on:

##### 1. Country Partnership Frameworks

A Country Partnership Framework (CPF) is the central tool used by the World Bank to review and guide the World Bank's country programs and gauge their effectiveness. The CPF identifies the key objectives and development results through which the World Bank intends to support a Borrower in its efforts to end extreme poverty and boost shared prosperity in a sustainable manner.

##### 2. Systematic Country Diagnostics

The World Bank and the Borrower draw upon the Systematic Country Diagnostic to develop the CPF objectives together. From these the country development goals are derived and aligned with the World Bank's twin goals and taking into account opportunities for leveraging the private sector to provide sustainable solutions to development problems.

SEARCH FUNCTION	
<b>Country Engagement</b>	
Bank webpage: <a href="#">Country Engagement</a>	
<b>SEARCH by Country Partnership Framework:</b>	use the tab ' <i>Country Partnership Framework</i> '
<b>SEARCH by Systematic Country Diagnostic:</b>	use the tab ' <i>Systematic Country Diagnostic</i> '

#### b. Projects and Operations

This search engine provides detailed information on individual projects and operations.

SEARCH FUNCTION	
<b>Projects &amp; Operations</b>	
Bank search engine: <a href="#">Projects &amp; Operations</a>	
<b>OPEN SEARCH function:</b>	type search criteria in the Search function – note: select 'Search Procurement only' to focus the search
<b>BROWSE by Country:</b>	use the tab ' <i>By Country</i> ,' and select from listing
<b>BROWSE by Sector:</b>	use the tab ' <i>By Sector</i> ' and select from listing
<b>BROWSE by Theme:</b>	use the tab ' <i>By Theme</i> ' and select from listing

### 4 Search by World Bank Apps

There are several Bank Apps available that assist in finding procurement specific information. These include:

1. **Project Procurement App**
2. **WBG FinancesOne**
3. **Project Procurement Pipeline (formerly Monthly Operational Summary (MOS))**

1. Project Procurement App

SEARCH FUNCTION
<p><b>Project Procurement App</b></p> <p>downloadable App</p> <p><a href="#">Android App</a></p> <p><a href="#">iPhone App</a></p>

This App provides easy and open access to current procurement data. It allows users to analyze the data through various visualized queries. The App also provides information on procurement opportunities under the listed projects.

2. FinancesOne

SEARCH FUNCTION
<p><b>FinancesOne</b></p> <p>WBG search engine: <a href="#">FinancesOne Website</a></p> <p>User support information: <a href="#">User Guidance</a></p>

This webpage presents one destination for easy access to publicly available, and up-to-date financial information on World Bank operations.

3. Project Procurement Pipeline

SEARCH FUNCTION
<p><b>Project Procurement Pipeline</b></p> <p>Search engine: <a href="#">Projects &amp; Operations</a></p> <p>User support information: <a href="#">User guidance</a></p>

This search engine provides current information on World Bank projects in the procurement pipeline. It replaces the Monthly Operational Summary by providing a dynamic, user focused real time search engine.

#### **How to search the procurement pipeline**

- a. By using the filter 'Status,' select 'Pipeline' from the drop-down list.
- b. Searches can be refined by other filters, such as:
  - i. Timeframe
  - ii. Country
  - iii. Region
  - iv. Sector

## 5 Search by Procurement Notices

### Procurement Notices

Procurement notices are the formal notices that require to be published and made available to the market. It is the method by which the Borrower informs the market of procurement opportunities.

Examples of procurement notices include:

■ GPN	■ ITB	■ RFB	■ invitation to Pre-qualify
■ SPN	■ IFB	■ RFP	■ Initial selection
■ REol	■ RFQ		■ Contract Award

There are several places where procurement notices for World Bank-financed projects are published. For procurements subject to open international competition, the invitation is published on:

1. UN Development Business website (UNDB),
2. World Bank's external website,
3. a local newspaper of wide circulation and/or a free access website.

1. UN Development Business



UNDB) is the official platform for consulting, contracting, and exporting opportunities in the development arena. Contractual opportunities from various financing institutions are published daily for projects in more than 180 countries and across a wide range of sectors.

Contract awards are published regularly, allowing subscribers to stay informed and monitor trends in their respective fields and identify business partners for subcontracting and other opportunities.

- a. Three types of information available on the UNDB platform:
  - i. Development Bank Operational Summaries
  - ii. Procurement Notices
  - iii. Contract Awards.
- b. Sources of project information include:
  - i. Multilateral Development Banks (this includes the World Bank)
  - ii. Intergovernmental Organizations

- iii. National Governments
- iv. United Nations Agencies.

## 2. World Bank Procurement Notices



This search function allows users to search using a range of filters, including:

- a. Country
- b. Region
- c. Notice type, for example:
  - i. Contract Award
  - ii. GPN
  - iii. Invitation to Prequalify
  - iv. Goods & Works Awards
  - v. Small Contracts Awards
  - vi. Consultant Awards
- d. Procurement method, for example:
  - i. RFP
  - ii. RFB
  - iii. RFQ
  - iv. International Competitive Bidding
  - v. National Competitive Bidding
  - vi. Individual Consultant Selection
  - vii. Direct Selection
  - viii. E-Auctions
  - ix. Imports



- e. Procurement group
  - i. Consulting Services
  - ii. Goods
  - iii. Works
  - iv. Non-consulting Services

Subscribe to the World Bank's Procurement Notices to receive the latest World Bank news, project documents, procurement notices, research, and more. Alerts are delivered to your inbox daily and can be customized by country, topic, and type of content.



# Operations Procurement – Policy, Principles & Regulations

## Procurement Rules

The World Bank modernized Operations Procurement in 2016. As a result, there are two sets of rules that may apply to World Bank funded IPF projects. Which set of rules applies depends on when the project was approved by the World Bank, i.e., pre or post July 1, 2016.

### **Before July 1, 2016** – ‘Guidelines’

For procurements initiated before this date the World Bank’s previous [Procurement Guidelines](#) for Goods, Works and Non-consulting Services, and [Consultant Guidelines](#) for the selection and employment of Consultants apply.

### **After July 1, 2016** – ‘Regulations’

For procurements initiated after this date the World Bank’s new [Procurement Framework](#) applies.

## World Bank Procurement Framework

This Guidance focuses on procurement conducted under the Procurement Framework. A description of the Procurement Framework and supporting information can be found at:

World Bank, Procurement Framework for IPF Projects [website](#)

The Framework comprises a range of policies, procedures and requirements. The core mandatory documents are:

1. [Procurement Regulations](#)
2. [Procurement Policy](#)
3. [Procurement Directive](#)
4. [Procurement Procedure](#)

These four mandatory documents are supported by other materials, which include:

1. a set of Standard Procurement Documents (SPDs)
2. a range of procurement guidance

3. procurement tools and templates
4. questions & answers, videos and updates
5. webinar training material
6. e-learning modules.

## Vision and Principles

### Vision

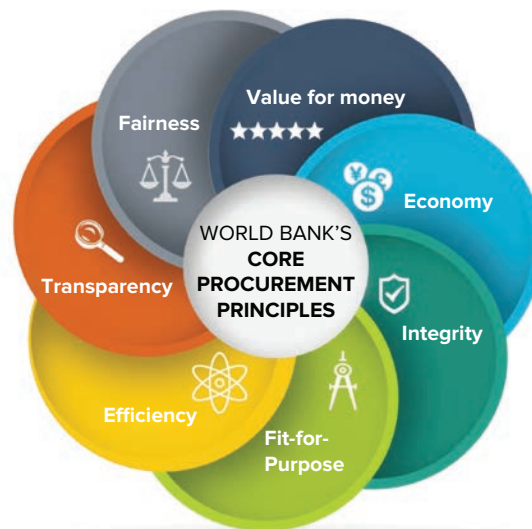
The Procurement Framework describes the vision for IPF procurement as:

“Procurement in Investment Project Financing (IPF) supports Borrowers to achieve Value for Money (VfM) with integrity in delivering sustainable development.”

### Core Procurement Principles

The Procurement Framework’s core procurement principles are described in the Procurement Policy and listed in Figure VI. These principles generally guide the World Bank’s decisions when applying the *Procurement Regulations*.

**FIGURE VI** Benefits of Selling to IPF-financed Projects



The Core Procurement Principles are described as follows:

1. **Value for Money.** The principle of VfM means the effective, efficient, and economic use of resources, which requires an evaluation of relevant costs and benefits, along with an assessment of risks, and non-price attributes and/or life cycle costs, as appropriate. Price alone may not necessarily indicate the best VfM.

- 2. Economy.** The principle of economy takes into consideration factors such as sustainability, quality, non-price attributes and/or life cycle cost as appropriate, that support VfM. It permits integrating into the procurement process economic, environmental, and social considerations that the World Bank has agreed with the Borrower. It also permits augmenting identified sustainability criteria with specific criteria in support of the Borrower's own sustainable procurement policy.
- 3. Integrity.** The principle of integrity refers to the use of funds, resources, assets, and authority according to the intended purposes and in a manner that is well informed, aligned with the public interest, and aligned with broader principles of good governance. The World Bank requires that all parties involved in the procurement process, and their personnel, observe the highest standard of ethics during the procurement process and refrain from fraud and corruption, as defined in the World Bank's [\*Anti-Corruption Guidelines\*](#).
- 4. Fit-for-purpose.** The principle of fit-for-purpose applies both to the intended outcomes and the procurement arrangements in determining the most appropriate approach to meet the project development objectives and outcomes, taking into account the context and the risk, value, and complexity of the procurement.
- 5. Efficiency.** The principle of efficiency requires that procurement processes be proportional to the value and risks of the underlying project activities. Procurement arrangements are generally time-sensitive and strive to avoid delays.
- 6. Transparency.** The principle of transparency requires that the Borrower and the World Bank enable appropriate reviews of procurement activities, supported by appropriate documentation and disclosure. Transparency requires:

  - a. relevant procurement information is made publicly available to all interested parties, consistently and in a timely manner, through readily accessible and widely available sources at reasonable or no cost
  - b. appropriate reporting of procurement activities
  - c. confidentiality provisions in contracts are used only where justified.
- 7. Fairness.** The principle of fairness refers to:

  - a. equal opportunity and treatment for Bidders, Proposers or Consultants
  - b. equitable distribution of rights and obligations between Borrowers and suppliers, contractors and Bidders, Proposers or Consultants
  - c. credible mechanisms for addressing procurement-related complaints and providing recourse.

Open competitive procurement is the World Bank's preferred procurement approach, whenever possible, to maximize fairness of opportunity to Bid. Whenever possible, the World Bank requires

that eligible individuals and firms be given the same opportunities to compete for World Bank financed activities. For information on complaints refer to the Procurement Guidance, [Procurement-related Complaints](#).

## Integrity

In line with the Core Procurement Principle of integrity, the Bank requires that all parties involved in the procurement process and their personnel observe the highest standards of ethics during the procurement and refrain from fraud or corruption. The Bank will reject a Borrower's proposal for award of contract if it determines that the firm or individual recommended (including any of its staff, agents, suppliers, or employees) has, directly or indirectly, engaged in fraud or corruption in competing for the contract in question.

## Bank's Audit and Inspection Rights

The Bank has the right to inspect and audit a contractor or sub-contractor's accounts and records. This right is established through Borrowers including a clause in the Procurement Documents requiring that Bidders, Proposers or Consultants (including their sub-contractors, sub-consultants, agents, and personnel) permit the Bank to inspect and audit all accounts, records and other documents relating to the procurement process, selection, and/or contract execution. The Bank may appoint auditors to act on its behalf. For further details, see Annex IV of the *Procurement Regulations*.

## Sanctions and Remedies

The Bank may exercise various sanctions and remedies where fraud and corruption have been detected. These sanctions and remedies can be found in the:

1. "Legal Remedies" section of the financing agreement for each project
2. "Legal Remedies" section of the contract between the Borrower and the contractor or Consultant
3. Procurement Regulations, Annex IV, Fraud and Corruption.

The World Bank may sanction a firm or individual that has been found by the World Bank to have engaged in fraud or corruption in relation to a Bank-financed project. In relation to a Borrower, the World Bank may declare a misprocurement if it determines at any time that a representative of the Borrower has engaged in fraud or corruption during the procurement process, selection, and/or execution of the contract in question.

## Procurement Framework Innovations

Under the Procurement Framework, there are several innovations that help both Borrowers and Suppliers. The Framework introduced the following:

- 1. Planning and strategy:** Needs and risks specific to a project are analyzed through a PPSD. This analysis enables the Borrower to have a strategy on how best to engage with the market. The analysis ensures that procurement processes are fit-for-purpose, allow choice, and are appropriate to the size, value, scope, and risk of the project.
- 2. Value for Money:** The Procurement Framework initiated a shift in focus from the lowest evaluated compliant Bid to Bids that provide the best overall VfM, taking into account quality, cost (including whole-of-life cost where appropriate), and other factors, as required. This approach is strengthened by the use of Rated Criteria.
- 3. Approved Selection Methods:** There are three classifications which are:
  - a. Selection Methods Request for Proposals (RFP), Request for Bids (RFB), Request for Quotations (RFQ) and Direct Selection
  - b. Selection Arrangements Competitive Dialogue, Public-Private Partnerships, Commercial Practices, UN Agencies, e-Reverse Auctions, Community Driven Development, etc.
  - c. Market Approach Options open competition, limited competition, direct selection, national or international competition, pre-qualification, initial selection, single-stage process, multi-stage process, Best and Final Offer (BAFO), negotiation, use of Rated Criteria, etc.
- 4. Procurement Approach:** The procurement approach involves designing a fit-for-purpose procurement process to award contracts that deliver the Project Development Objectives and optimal VfM. This includes the procurement arrangements, procurement risk management, contract strategy, market engagement, specifications or requirements and contract management.
- 5. Abnormally Low Bids or Proposals:** If a Bid or Proposal is found to be “Abnormally Low” it is rejected by the Borrower. This can happen where, for example the Bid price, in combination with other elements of the Bid, is so low that it raises material concerns as to the Bidder’s capability to perform the contract for the offered price. Where the Borrower identifies a potentially Abnormally Low Bid or Proposal, there is a specific process that must be followed. The Borrower must seek written clarification from the Bidder or Proposer. If the Bidder or Proposer fails to demonstrate its capability to deliver the contract for the offered price, the Borrower shall reject the Bid or Proposal.
- 6. Standstill Period:** A Standstill Period is a pause in the procurement process following the Notification of Intention to Award the contract and the actual award of the contract. It affords any unsuccessful Bidder, Proposer or Consultant time to consider why they were not successful, and if appropriate, submit a complaint in relation to the decision to award the contract. The Standstill Period is ten Business Days after the transmission of the Notification of Intention to Award. The contract cannot be awarded until the Standstill Period expires, or a duly submitted complaint has been addressed, whichever is later.

- 7. Complaints:** The Procurement Framework sets out the procedures that apply to the management of procurement-related complaints. These procedures allow a Bidder, Proposer or Consultant opportunity to voice concerns during the procurement process, and before a contract is awarded. Reference the Procurement Guidance, [Procurement-related Complaints](#).
- 8. Contract Management:** The World Bank has greater involvement in contract management for high-value and high-risk procurements. This helps to ensure the best possible outcomes and supports problems being resolved as they arise.

## Procurement Regulations

The [Procurement Regulations](#) govern the procurement of Goods, Works, Consulting and Non-consulting Services for all IPF operations approved after July 1, 2016.

The Procurement Regulations are the detailed rules that Borrowers apply when undertaking World Bank-funded procurement. You should become familiar fully understand how the procedures and requirements apply to your situation before participating in an Operations Procurement opportunity.

## Special Considerations

- 1.** The Borrower may use its own national procurement procedures when the procurement involves an approach to the national market (typically used for lower value procurements), and the World Bank agrees to this approach. The World Bank must be satisfied that the Borrower's procedures uphold and protect open, competitive procurement.
- 2.** Where a contract is not financed by the World Bank, but it is included in the scope of a World Bank financed project, the Borrower may adopt other procurement procedures, but only if the World Bank is satisfied:
  - a.** that the rules and procedures will ensure that the Borrower carries out the project diligently and efficiently
  - b.** the deliverables are specified to a satisfactory quality
  - c.** the contract will be completed in a timely manner
  - d.** the price does not have an adverse effect on the economic and financial viability of the project.

## Exceptions

The Procurement Regulations do not apply to the procurement of Goods, Works, Non-consulting Services, and Consulting Services financed by the Bank:

- a. under projects where the Bank provides a guarantee only in respect of the project, and/or
- b. the project is funded through loans by financial intermediaries to private borrowers.

## Eligibility

In order to participate in a procurement opportunity each Seller, and if appropriate the Goods that they supply, must be “eligible.” There are strict rules that govern eligibility. The general conditions that apply to eligibility are contained in the Procurement Regulations. The specific conditions that apply to each procurement are detailed in the Procurement Documents issued by the Borrower to the market.

In general terms, the World Bank permits eligible firms and individuals from all countries to offer Goods, Works, Consulting and Non-consulting Services for World Bank-financed projects.

The following summarizes the types of eligibility conditions that generally apply.

### *General Rule*

A Borrower cannot deny an eligible Seller the right to participate in a procurement, or to be awarded a contract, for reasons unrelated to:

1. the Seller’s capability and resources to successfully perform the contract, or
2. a conflict of interest.

### *Exceptions to General Rule*

A Borrower can deny a Seller the right to participate, or to be awarded a contract if:

1. the Seller is from a country, or the Goods are manufactured in a country, and:
  - a. the Borrower’s laws or regulations prohibit commercial relations with that country (provided that the World Bank is satisfied that the exclusion does not preclude effective competition), or
  - b. if the procurement is to be implemented across jurisdictional boundaries (i.e., the procurement involves more than one country) exclusion of a Seller on this basis by one country, may apply if the World Bank, and all of the other countries involved in the procurement, agree, or
  - c. by the act of compliance with a United Nations Security Council taken under Chapter VII, Borrower’s laws prohibit the import of Goods from that country, or prohibits payments to a country, or a person or entity in that country.
2. the Seller has been sanctioned by the World Bank, pursuant to the World Bank’s Anti-Corruption Guidelines and in accordance with its prevailing sanctions policies and procedures.

## State-Owned Enterprises

State-Owned Enterprise or institution (SOEs) of the Borrower's country are not normally eligible to participate. However, they may be eligible to compete and be awarded contracts in the Borrower's country if they can establish that they:

1. are legally and financially autonomous
2. operate under commercial law, and
3. are not under supervision by the agency contracting them.

However, when the Goods, Works, or Services provided by SOEs (including state-owned universities, research centers, or institutions) are of a unique and exceptional nature, or because their participation is critical to the project, the World Bank may exceptionally agree to contracting them, on a case-by-case basis. SOEs outside the Borrower's country are eligible to participate.

## Anti-Corruption

A firm or individual is not eligible where it has been sanctioned under the World Bank's [Anti-Corruption Guidelines](#) and declared ineligible. (see also Procurement Regulations Annex IV, Fraud and Corruption).

A Borrower may request that the World Bank agree to exclude a firm or individual that is under a sanction of debarment by the judicial or administrative authorities in the Borrower's country. However, the World Bank must be satisfied that the debarment relates to fraud or corruption, and that the judicial or administrative proceedings provided adequate due process.

## SEA/SH Disqualification

The World Bank may disqualify a firm from being awarded a contract, financed in whole or in part by the World Bank, for a period of two years if the firm has been determined to be noncompliant with its contractual Sexual Exploitation and Abuse or Sexual Harassment (SEA/SH) Prevention and Response obligations. The determination of noncompliance is made in accordance with the procedures specified in the applicable Standard Procurement Document.

## Bidder Declaration – Forced Labor – Solar Panels & Components

In procurements, where solar panels or components are 'core functions of the project', Bids or Proposals must be accompanied by a [Forced Labor Past Performance Declaration and Forced Labor Declaration](#). Failure to provide these can result in the Bid or Proposal being determined as non-conforming. These provisions were introduced due to the significant risk of forced labor in the global supply chain for solar panels and solar components. To mitigate forced labor risks, the Bank requires Borrowers to strengthen solar related procurement processes by including forced labor Bidder declarations, qualification requirements and strengthened contractual provisions in procurements involving financing of solar panels and/or solar components. All such procurements will be subject to Bank prior review and Bank no objection.



## Additional Features

### Beneficial Ownership

A beneficial owner is a person (a real, living person), who ultimately owns or controls a company, or who materially benefits from the assets held by a company.

Identifying the beneficial owner supports transparency, is key to fighting corruption and helps prevent the abuse of legal structures for criminal purposes.

### Requirements

As part of promoting transparency in procurement and fighting corruption the World Bank has mainstreamed transparency by requiring the disclosure of the beneficial owner, in the circumstance described below.

When this requirement applies the World Bank classifies a beneficial owner of a Bidder or Proposer as any natural person who ultimately owns or controls the Bidder or Proposer. The test to determine ownership or control are where one or more of the following conditions are met:

1. directly or indirectly holding 25% or more of the shares
2. directly or indirectly holding 25% or more of the voting rights
3. directly or indirectly having the right to appoint a majority of the board of directors or equivalent governing body of the Bidder or Proposer.

The requirement to disclose the beneficial owner applies to:

1. all new IPF procurements advertised or invited on or after July 1st, 2022
2. that are subject to open or limited international competition
3. that are governed by the Procurement Regulations for IPF Borrowers
4. and subject to either Prior Review or Post Review.

The Borrower's Procurement Documents will state when the requirement applies. When it applies, Borrowers shall require the winning Bidder, Proposer or Consultant to provide beneficial ownership information by completing a Beneficial Ownership Disclosure Form, which is then published by Borrowers as part of the Contract Award Notice.

### Process

The processes in relation to an affected procurement are:

1. The Procurement Plan specifies that the procurement is subject to Beneficial Ownership disclosure.

2. The Specific Procurement Notice specifies that the Borrower shall disclose information on the successful Bidder, Proposer or Consultant's Beneficial Ownership, as part of the Contract Award Notice, using the Beneficial Ownership Disclosure Form as included in the Procurement Document.
3. The Letter of Acceptance shall require Beneficial Ownership information to be provided within 8 business days.
4. Contract Award Notice publication shall include the Beneficial Ownership Disclosure Form.

## Direct Payment

In 2018, the World Bank launched the Mandatory Direct Payment Pilot, which helps facilitate payments directly from the Bank to Borrowers' contractors. The pilot was launched in response to increased concern that payment risks (especially slow payment) are affecting competition.

When Direct Payment applies disbursement of World Bank financing under contracts for Goods, Works, Non-consulting Services and Consulting Services procured or selected through international open or limited competition, or through direct selection must be made through the Direct Payment disbursement method, unless a Special Commitment disbursement method has been selected.

The Procurement Documents issued by the Borrower will identify those contracts subject to Direct Payment. Requests for Direct Payments will be disbursed by the World Bank to the contractor or supplier directly, after receiving a duly authorized withdrawal application and supporting documents from the country's authorized official confirming the satisfactory receipt of Goods, Works or Services.

## Sustainable Procurement

Sustainable procurement is "a process whereby public organizations meet their needs for goods, services, works, and utilities in a way that achieves value for money on a whole lifecycle basis in terms of generating benefits not only to the organization, but also to society and the economy, whilst minimizing damage to the environment." Sustainable procurement can deliver a range of benefits, directly and indirectly, across economic, social, and environmental aspects of a procurement.

The Bank has established several policies and initiatives to create awareness and strengthen the design and implementation of sustainable development solutions. These include the [Environmental and Social Framework](#) (ESF), [Green, Resilient and Inclusive Development](#) (GRID), Procurement Guidance [Sustainable Procurement](#).

To achieve sustainable procurement, it is essential that Bidders and Proposers participating in IPF projects are explicitly incentivized and directed to consider how development objectives can be designed and implemented in ways that meet the World Bank's objectives and the Borrower's needs.

Given the prevalence of Works projects within the World Bank's IPF portfolio, much of the advice and guidance is targeted at construction-related contracts, while acknowledging that sustainable

public procurement measures should be tailored to country context and fit-for-purpose in relation to individual projects' risks and opportunities.

## Environmental and Social Framework

The World Bank's ESF supports green, resilient and inclusive development by strengthening protections for people and the environment and making important advances in areas such as labor, inclusion and non-discrimination, gender, climate change, biodiversity, community health and safety, and stakeholder engagement. It uses a risk-based proportionate approach that applies increased oversight and resources to complex projects and allows for greater responsiveness to changes in project circumstances through adaptive risk management and stakeholder engagement. It promotes integrated environmental and social risk management.

ESF establishes ten [Environmental and Social Standards](#) (ESS) which describe the requirements for Borrowers relating to the identification, assessment, and mitigation of E&S risks and impacts. SEA/SH measures are embedded within the ESS. This gives Borrowers a clear roadmap for delivering IPF in a manner consistent with international good practice in governance, transparency, accountability, and sustainability.

## Sexual Exploitation and Abuse and Sexual Harassment

The World Bank is committed to fighting gender-based violence in all its forms and has zero tolerance for its occurrence in Bank-financed projects. Gender-based violence includes Sexual Exploitation and Abuse (SEA), and Sexual Harassment (SH). SEA/SH measures are embedded within the ESS.

To reinforce the Borrower's ability to hold contractors (and subcontractor/s) accountable for fulfilling their SEA/SH contractual obligations the World Bank introduced a mechanism to disqualify contractors and/or sub-contractors for failing to comply with SEA/SH related contractual obligations. This mechanism applies to large Works contracts procured after January 1, 2021, under infrastructure projects rated high-risk for SEA/SH. (Reference the paragraph "SEA/SH Disqualification" above).

## Rated Criteria

Rated Criteria are used to assess non-price factors of Bids and Proposals. Since 2016, the World Bank's Procurement Framework has enabled Borrowers to use Rated Criteria to evaluate nonprice factors such as technical matters, quality, sustainability, environmental, social, innovative aspects of Bids, and so on, when determining an award decision

A key objective of the Procurement Framework is to provide Borrowers the flexibility to adopt more strategic approaches to procurement, including the use of Rated Criteria. Rated Criteria prioritize fit-for-purpose solutions rather than awarding contracts based on the lowest-evaluated price.

New international Procurements advertised on or after September 1, 2023, using a Bank SPD must use Rated Criteria.

However, application of Rated Criteria will not be mandatory for Procurement of:

1. Pharmaceuticals
2. Vaccines
3. Off-the-shelf Goods and educational materials
4. Commodities
5. Other exceptions cleared by the World Bank's Chief Procurement Officer on a fit-for-purpose basis.

Rated Criteria help Borrowers achieve optimal VfM by ensuring that, in addition to price, all relevant technical and qualitative non-price factors are taken into account in the determination of the Most Advantageous Bid or Proposal. The use of Rated Criteria also increases the willingness of the best suppliers to bid and participate in Bank-financed projects—with the knowledge that their added value will be part of the evaluation, thereby increasing options, global competition, and likelihood for effective market solutions.

### *Rated Criteria Implications for Bidders and Proposers*

The use of Rated Criteria provides Bidders and Proposers with:

1. Greater flexibility to put forward tailored and innovative solutions
2. An opportunity to differentiate from other Bidders or Proposers through describing proposed delivery methodology, key personnel, approaches to sustainability, etc.
3. A greater chance of being successful if they effectively demonstrate their ability to deliver high quality.

Bidders and Proposers will need to:

1. Demonstrate a clear understanding of specific project risks and articulate proposed credible mitigations
2. Ensure that promises proffered in their Bids or Proposals are achievable within the submitted costings, as they will be included in the contract.

### *Evaluation*

When Rated Criteria are applied, the evaluation is conducted on the basis of a two-envelope procedure. Technical bid envelopes are opened first and evaluated. Then the financial bid envelopes (of only those Bidders whose technical Bids are evaluated as responsive) are opened and evaluated.

Rated Criteria are assessed using a scoring system. Each criteria is prioritized and weighted according to its relative importance to the Borrower. Weightings are then applied to the scores

assigned to each criteria. This approach to evaluation facilitates the evaluation of technical merit, quality, risk, sustainability and other relevant technical and quality factors, and objectively compares each Bid or Proposal against the others regarding the quality of the technical solution in response to the Borrower's requirements.

The higher the technical score, the better the Bid or Proposal meets the Rated Criteria quality aspects required by the Borrower. The technical and financial scores are added to produce a combined score. Once the combined scores are known, Bids or Proposals are ranked in order of merit from the highest to lowest combined scores. The Bid or Proposal offering optimal VfM is the one with the highest combined score.

For more information on Rated Criteria reference the Procurement Guidance, [Evaluating Bids and Proposals](#) and [Value for Money](#).

## Cybersecurity

The integration of ICT products and services in IPF projects and the growing reliance on digital technologies increase exposure to cybersecurity risks across a wide array of sectors. The principles of integrating cyber security in IPF include:

1. Security-by-design
2. Integrate cybersecurity expertise and capacity building
3. Assess cybersecurity risks and align mitigation measures
4. Use certifications to add assurance.

World Bank SPDs include applicable cybersecurity contract provisions and advice to Borrowers on relevant aspects to be considered when preparing the Procurement Documents. This ranges from determining the level of cyber security risk arising, describing in the specification the risk/s to be managed, defining cybersecurity qualification requirements, requiring the Bidder or Proposer to submit its strategy to manage the risk, developing rated criteria that address cyber security risk. These additional provisions facilitate assessing each Bidder's or Proposer's cyber security credentials, practices, track record, and proposed approach to mitigation and management. It is particularly impactful when used to enhance cyber security requirements in the procurement of IT systems and other projects that pose cyber security risks.



## Operations Procurement – Process Overview

### Key Stages of the Procurement Process

The Procurement Process is defined in the Procurement Regulations as “the process that starts with the identification of need and continues through planning, preparation of specifications/ requirements, budget considerations, selection, contract award and contract management.”

While each procurement is unique, all procurement processes broadly follow seven common stages. Figure VII is a simplified representation of the procurement process. It shows the common stages and their usual sequencing. Actual procurements may differ.

**FIGURE VII** Summary of the Procurement Process



## 1. Develop Strategy

During the project preparation phase, the Borrower is required to prepare a Project Procurement Strategy for Development (PPSD) for the project. The PPSD is the cornerstone document for ensuring that procurement arrangements are properly planned and designed to meet the Project Development Objectives.

### a. Project Procurement Strategy for Development

The PPSD analyzes and summarizes the various factors that influence the Borrower's procurement approach. The Borrower has some flexibility in designing the procurement approach. The design should reflect the optimal way to conduct the procurement. Taking a structured approach to designing the procurement increases the likelihood of the mostly high-qualified Bidders or Proposers submitting offers, facilitates the Borrower achieving VfM and supports successful delivery of the desired development results.

It is at the stage of writing the PPSD that the Borrower decides on the types of Evaluation Criteria that will be applied to each major contract, including the application of Rated Criteria to the non-price/technical/quality attributes of Bids or Proposals, as well as the proposed prioritization and weightings of such attributes, and how quality and price will be combined to determine the MABP. The decisions made at this stage then feed into the design of the Procurement Plan.

For Works procurements in projects classified as high-risk for SEA/SH, the Procurement Plan includes the use of the large Works SPD with SEA/SH provisions and a Contract Management Plan.

The PPSD assessment covers the following topics, as summarized in Figure VIII.:

- i. Operating Environment:** The operating environment and how it may influence the participation of potential Bidders or Proposers and the way in which the procurement will be conducted.
- ii. Borrower's Capacity and Track Record:** Borrower's previous experience, track record, and capability in conducting similar procurements and in implementing similar projects. This step includes a resourcing plan to complement the Borrower's capacity as needed, which may include the need for HEIS to be provided by the Bank.
- iii. Market:** Review of the market to understand its nature and how it functions in the operating environment, including nationally, regionally, and internationally. This step includes assessing the level of supply (i.e., the likely number of potential Bidders or Proposers), the degree of competition among Bidders or Proposers, anticipated prices, the factors that influence price, the level of demand in the market (i.e., the likely number of buyers, including how much they buy and their level of influence on the market), and whether there is a shortage of supply or of qualified suppliers.



FIGURE VIII Content of a PPSD

Project Procurement Strategy for Development (PPSD) Summary of Contents	
Analysis and Assessments	Procurement Approach
1 Project Overview	6 Procurement Approach Options and Recommendations Addresses the following factors: ▪ Requirements ▪ Contract Strategy ▪ Selection Method ▪ Evaluation Methodology ▪ Contract Management
2 Strategic Assessment of Operating Context and Borrower Capability	
3 Procurement Risk Analysis	
4 Stakeholder Analysis	7 Preferred Arrangement for Low-Value Low-Risk Activities
5 Procurement Objectives	8 Summary of PPSD to support the preparation of the PAD by the Bank

#### b. Procurement approach

From analyzing this information, the Borrower designs an appropriate procurement approach, which details:

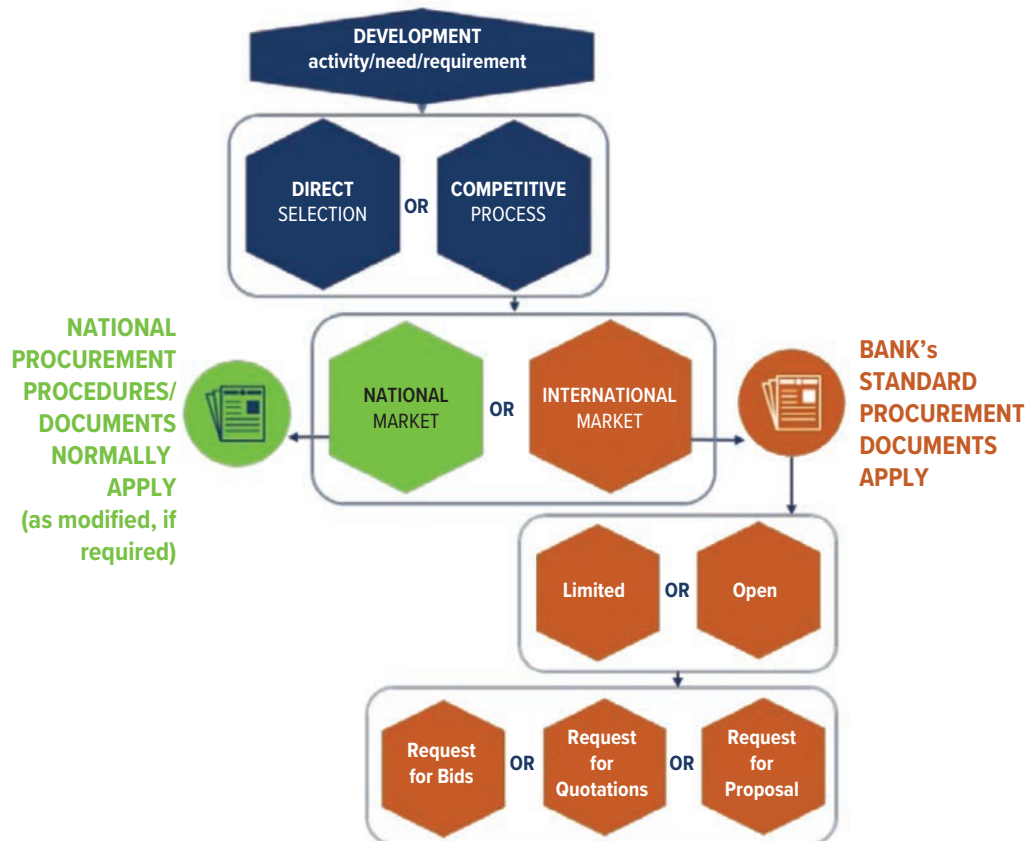
- i. the type of requirements / specifications to be used. These may be conformance-based or performance-based. Conformance requirements are detailed specifications of the Borrower's precise needs and the method for achieving them. Performance requirements outline the Borrower's desired outcomes and invite Bidders or Proposers to propose solutions to meet these needs, which support facilitating innovation by the market
- ii. the type of contract
  - (a) how the Borrower will approach the market for each procurement to obtain offers from the most high-qualified Bidders or Proposers, including whether the Borrower will include national or international competition
  - (b) the selection method that the Borrower will apply to request offers from Bidders or Proposers (e.g., RFB, RFP, RFQ)
  - (c) the evaluation and qualification criteria (including Rated Criteria) that will be used to compare the Bids or Proposals received and identify the Bidder or Proposer that submits the MABP
  - (d) a Contract Management Plan outlining how the contract will be monitored to ensure that each party meets its obligations and that the VfM offered in the winning Bid or Proposal is delivered through the performance of the contract.

Bank staff then include a summary of the PPSD in the Project Appraisal Document (PAD). The PAD is used to seek the approval of the Bank’s Board to finance the project. It is important that the PPSD be sufficiently detailed to explain and justify the Borrower’s selected procurement approach. The level of detail in the PPSD should be proportionate to the complexity, risk, and value of the planned procurement under the project.

**c. Approach to market options**

The Procurement Regulations provide a variety of selection methods and market approach options. This variety allows greater flexibility in designing individual procurement approaches that are fit-for-purpose and deliver the optimal VfM. Figure IX illustrates the decision points in determining the appropriate approach to market.

**FIGURE IX** Example of Selection Methods Decision Logic



**d. Competitive versus non-competitive**

The first step in determining the approach to the market is deciding whether to follow a competitive or non-competitive procurement approach.

- i. Non-competitive approach:** Direct selection is a non-competitive approach which permits the Borrower to approach and negotiate with only one firm. Proportional,

fit-for-purpose, and VfM considerations may require a direct selection approach. Or direct selection may be appropriate if there is genuinely only one qualified firm or there is justification to use a preferred firm.

- ii. **Competitive approach:** A competitive approach involves multiple firms being invited to participate in the procurement and submit Bids or Proposals. An open, competitive approach to the market is the World Bank's preferred approach as it provides opportunities for all eligible, interested Bidders or Proposers to submit offers and compete for the award of contract. Under an open competitive approach, the Borrower may approach its national market or the international market, as justified in the PPSD.

#### e. International versus national markets

- i. **International competition:** Approaching the international market may be appropriate when the participation of foreign Bidders or Proposers will increase competition and may deliver better VfM. Open international competitive procurement with international advertising is the Bank's preferred approach for complex, high-risk, and/or high-value contracts. In international procurements, national Bidders or Proposers are also eligible to participate.

For international competitive procurements, Borrowers are required to use the Bank's Standard Procurement Documents (SPDs.) The range of SPD templates covers the most widely used selection methods (e.g., RFB, RFP) and procurement categories (Goods, Works, Consulting Services, Non-consulting Services) and a wide range of sector-specific documents.

The Borrower prepares its Procurement Documents based on the relevant World Bank SPD. The Procurement Documents describe the requirements and provide instructions to Bidders or Proposers on how to prepare and submit their Bids or Proposals. Accompanying them is the Bank's Guidance for Bidders or Proposers on Finding Business Opportunities And Winning Contracts Financed.

- ii. **National competition:** For national open competitive procurement, the Borrower may use its own national procurement procedures and Procurement Documents so long as they are consistent with the Bank's Core Procurement Principles and so long as the Borrower ensures that the Bank's Anti-Corruption Guidelines and Sanctions Framework and contractual remedies, set out in the financing agreement, apply and have been agreed with the Bank.

Approaching the national market may be appropriate under the following circumstances:

- (a) When the procurement is unlikely to attract foreign competition because of:
  - (1) the size and conditions of the market
  - (2) the value of the contract (refer to Bank Guidance, [Thresholds for procurement approaches and methods by country](#))

- (3) activities that are scattered geographically, spread over time, or are labor-intensive
  - (4) the local availability of the Goods, Works, or Non-consulting Services at prices below the international market.
- (b) The advantages of approaching the international market are clearly outweighed by the administrative or financial burden involved.
- (c) Foreign firms may participate in open national competitive procurement on the terms and conditions that apply to national firms.

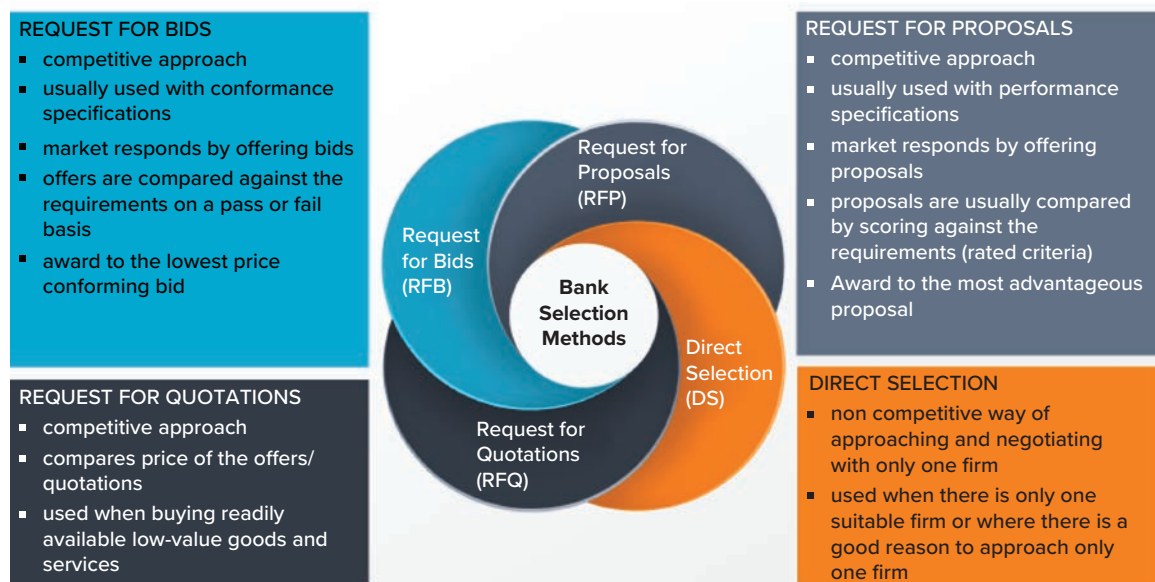
#### f. Selection Methods: Goods, Works, and Non-consulting Services

A selection method is the procurement process by which the Borrower approaches the market and invites offers (e.g., issues RFB, RFP, etc.). The Borrower selects the appropriate selection method based on:

- i. the nature of the goods and services to be procured and the extent to which the Borrower is able to specify its requirements
- ii. the level of competition in the market and how many suppliers in the market are able to meet the Borrower's requirements
- iii. the estimated cost of the goods and services to be procured.

By way of an example, Figure X explains the selection methods for the procurement of Goods, Works, and Non-consulting Services.

**FIGURE X** Selection Methods for Goods, Works, and Non-consulting Services



### **g. Other market approach options for complex and/or high-value procurement**

The Procurement Regulations (Section VI) provide other market approach options for complex and/or high-value procurements that are subject to international competitive procurement. These market approaches are subject to the following requirements:

- i. for transparency, their use must have been pre-disclosed in the Procurement Document issued to prospective Bidders or Proposers,
- ii. the procurement is subject to the World Bank's prior review owing to the level of risk and complexity, and
- iii. an independent probity assurance provider (prior agreed with the World Bank) observes the opening of Bids or Proposals and any negotiations to ensure that the processes are fair and that all Bidders or Proposers are treated impartially.

The other market approach options are:

- i. Competitive dialogue: An interactive, multistage market approach option that allows dynamic engagement with Bidders or Proposers. Competitive dialogue may be appropriate when there is no solution currently available on the market, or when several alternative solutions exist that could meet the Borrower's requirements. It allows the Borrower and Bidders or Proposers to discuss and further refine the detailed technical and commercial arrangements required to support the solutions. It may also be appropriate where, as a result of the nature and complexity of the procurement, the Borrower is not objectively able to define its requirements or adequately specify the legal and/or financial arrangements and contract. For further guidance on how to undertake a competitive dialogue process, see Procurement Guidance, Competitive Dialogue.
- ii. Best and Final Offer (BAFO): BAFO is a final Bid or Proposal in a multistage procurement process. The Borrower will state in the Procurement Documents if BAFO will apply and include a description of the process. When BAFO applies, after the first stage, which determines which Bids or Proposals meet the Borrower's requirements, the next stage involves providing those Bidders or Proposers an opportunity to submit their BAFO. BAFO is appropriate when the procurement process may benefit from Bidders or Proposers having a final opportunity to improve their Bids or Proposals, including by reducing prices, clarifying or modifying details, or providing additional information. It is normally particularly effective when markets are known to be highly competitive and there is strong competitive tension among Bidders or Proposers. See Procurement Guidance, Negotiations and BAFO.
- iii. Negotiations: In international competitive procurements, negotiations may be conducted following the evaluation of Bids or Proposals and before the award of contract. Negotiations may involve negotiating the terms and conditions, price, social and environmental aspects, and innovations. However, negotiations must not

change the minimum requirements set out in the Procurement Documents. Unlike BAFO, which is conducted with several Bidders or Proposers in parallel, negotiations are undertaken first with the Bidder or Proposer determined by the Bank to have the best Bid or Proposal. Only if this negotiation is unsuccessful may the Borrower negotiate with the next best ranked Bidder or Proposer. See Procurement Guidance, [Negotiations and BAFO](#).

#### **h. Selection methods: Consulting Services**

When contracting individuals or firms to provide Consulting Services, Borrowers follow the approved selection methods for Consulting Services. For details of these methods, see Section VII of the Procurement Regulations.

## **2. Plan the Procurement**

The Borrower is also required to prepare a Procurement Plan (PP), which is informed by analysis conducted and choices made in the PPSD. The PP is a detailed action plan that describes the procurement activities and sets out the schedule of dates. The PP includes:

- a. a brief description of what is to be procured,
- b. the cost estimate for the procurement,
- c. the selection method to be applied,
- d. the time schedules for the key steps of the procurement process, from initiation of the procurement to completion of contract implementation, and
- e. the type of Bank review that will apply.

In preparing the PP, the Borrower uses the Bank's online planning and tracking tool, called [STEP](#) (Systematic Tracking of Exchanges in Procurement). The Bank then reviews and agrees to the PP prior to completion of the loan negotiations; the final PP is then published on the Bank's website. The PP is a "living document." This means that it is designed to be updated regularly, at least annually during project implementation. Any updates to the PP are subject to the Bank's prior review.

## **3. Invite Offers**

The Borrower informs the market of the procurement opportunity and invites Bids or Proposals through an invitation (e.g., an invitation for Bids or Proposals). For procurements subject to open international competition, the invitation is published:

- a. in a local newspaper of wide circulation and/or on a free access website, and
- b. on the UN Development Business website, and
- c. on the Bank's external website.

The Borrower provides to interested Bidders or Proposers a Procurement Document that includes:

- a. the instructions to Bidders or Proposers on how to prepare and submit their Bids or Offers, including an explanation of how the MABP will be determined,
- b. a description of the Borrower’s requirements,
- c. standard forms to be completed by the Bidder or Proposer in preparing its Bid or Proposal, and
- d. the draft contract.

For procurements subject to international competition, Borrowers are required to use the Bank’s SPDs.

#### 4. Receive and Open Offers

Borrowers should allow market participants sufficient time to review the requirements and prepare and submit their Bids or Proposals. For procurements involving international competition, this time is usually at least 30 business days from the date of publication of the SPN. During this period, Bidders or Proposers may request clarification of the Procurement Documents or the Borrower’s requirements. Borrowers should address such queries in a timely manner and share the responses with all potential Bidders or Proposers.

Where Borrowers amend the Procurement Documents, the amendments should be sent to all potential Bidders or Proposers. For procurements subject to prior review, these amendments should be issued only after the Bank’s review.

The Procurement Documents specify the address where Bids or Proposals are to be submitted and the time and place where they will be opened. Opening is usually in public. An exception to a public opening arises when a closed opening may be justified with a BAFO, Competitive Dialogue, or Negotiations. A closed opening is not open to the public. Instead, a probity assurance provider observes the opening to ensure that the process is fair and ethical and that all Bidders or Proposers are treated impartially. The probity assurance provider’s report is openly published later, at the time of the award of contract.

#### 5. Evaluate Offers

Evaluation Criteria are used to define how the Borrower’s contracting authority will assess which Bid or Proposal provides the best response to their requirements.

Evaluation Criteria, and the method of applying them, must be established during the early stages of the procurement. They must be published in the Procurement Documents issued to the Bidders or Proposers. This requirement supports transparency and integrity in the procurement process. It is essential that potential Bidders or Proposers understand the criteria by which their

Bids or Proposals will be judged, and what criteria are the most important to the Borrower. In this way Bidders or Proposers will be better able to tailor their Bid or Proposal to meet or exceed the Borrower's needs.

Evaluation Criteria should be proportionate and appropriate to the type, nature, market conditions, complexity, risk, value, and objective of what is being procured. For further details on how to prepare Evaluation Criteria, see Procurement Guidance, [Evaluating Bids and Proposals](#).

The process to determine the MABP differs depending on the selection method used. In addition, the Borrower will structure the Evaluation Criteria for each procurement according to the country and project context and specific requirements, risks and outcomes. There are various types of criteria that may be applied to assess different aspects of Bids and Proposals. These include.

**a. Process Criteria**

Process criteria are used as a preliminary check undertaken when Bids and Proposals are opened to establish their compliance with the required procedural processes prescribed in the Procurement Documents. They determine if the Bid or Proposal is substantially responsive, which means that it meets the procedural requirements without material deviation, reservation, or omission.

**b. Qualification Criteria**

Qualification criteria are used to ensure that Bidders or Proposers have appropriate and adequate capacity, capability, and resources, as required by the Borrower, for the project. Bidders and Proposers must meet the mandatory or minimum qualification standard/s set by the Borrower. The test applied to each Qualification Criteria is pass or fail. The assessment of a Bidder's or Proposer's qualifications only considers the firm that submitted the Bid or Proposal. It does not take into consideration the qualifications of other firms such as its subsidiaries, parent entities, affiliates, or subcontractors.

**c. Minimum Technical / Performance Requirements Criteria**

Minimum requirements criteria specify the minimum technical and/or performance requirements and standards that must be met by each Bid or Proposal. The test applied to minimum technical, performance and/or standards criteria is pass or fail.

**d. Rated Criteria**

Rated Criteria are qualitative measures used to evaluate non-price attributes of Bids and Proposals, such as quality of the methodology or work plan, identification and mitigation of risks, opportunities for innovation including improvements in design, functionality or performance, approaches to achieving sustainability, and other technical aspects. Rated Criteria are weighted and scored.



### *Evaluation of Cost*

As specified in the Procurement Documents published by the Borrower, quoted costs may be evaluated against monetarily quantifiable criteria. This results in an evaluated cost, which facilitates comparison across all Bids or Proposals. When this type of evaluation is used the Procurement Documents specify the relevant factors, in addition to price, that will be considered, and describe the methodology that will be applied. Examples of when monetarily quantifiable methodology may apply include:

1. margin of domestic preference
2. time schedule
3. payment schedule
4. life-cycle costing
5. functional guarantees
6. discounts for the award of multiple lots.

### *Evaluation Process*

The Borrower must apply the Evaluation Criteria and methodology described in the Procurement Documents. No variation or inconsistent application is permitted. During the evaluation stage the Borrower may seek clarifications from the Bidders or Proposers, provided such clarification does not substantially alter the Bid or Proposal.

### *Abnormally Low Bids or Proposals*

As part of the evaluation, if a Bid or Proposal is suspected of being “abnormally low,” there is a prescribed process that the Borrower must follow. “Abnormally low” means that the Bid or Proposal price, in combination with other elements of the Bid or Proposal, is so low that it raises material concerns as to the Bidder’s/Proposer’s capability to perform the contract for that price. The Borrower must check the price with the Bidder or Proposer by seeking written clarification. If the Bidder or Proposer fails to demonstrate its capability to deliver the contract for the offered price, the Borrower rejects the Bid or Proposal. For further details, see [Procurement Guidance: Abnormally Low Bids and Proposals](#).

### *Confidentiality*

The evaluation process is confidential and should not be disclosed to any persons not involved in the evaluation and award decision process until the Borrower notifies the outcome of the evaluation process.

The Borrower prepares a report of the evaluation process. For procurements subject to the Bank’s prior review, the evaluation report is subject to review by the Bank before the Borrower communicates its intention to award the contract.

## 6. Award Contract

The award of the contract is made to the Bidder or Proposer that submits the Most Advantageous Bid or Proposal (MABP).

**a. When Rated Criteria are used**, the MABP is:

the Bid or Proposal of the Bidder or Proposer that meets the qualification criteria and whose Bid or Proposal has been determined to be:

- i. substantially responsive to the RFB or RFP document; and
- ii. the highest-ranked Bid or Proposal, based on a combination of price and technical/quality/non-price criteria.

**b. When Rated Criteria are not used**, the MABP is:

the Bid or Proposal of the Bidder or Proposer that meets the qualification criteria and whose Bid or Proposal has been determined to be:

- i. substantially responsive to the RFB or RFP document; and
- ii. the lowest evaluated cost.

**c. Consulting Services**, the MABP is the best evaluated Proposal.

### *Notification of Intention to Award*

Several steps must first be completed, to ensure transparency and accountability in the procurement process before the Borrower signs the contract with the successful Bidder or Proposer.

Following the decision to award the contract to the Bidder or Proposer with the MABP, the Borrower promptly sends a written notification of its intention to award the contract to each Bidder or Proposer that submitted a Bid or Proposal. This Notification of Intention to Award must be sent to all Bidders or Proposers at the same time and by the quickest means available (e.g., by email). Sending the notification of intention to award initiates the Standstill Period.

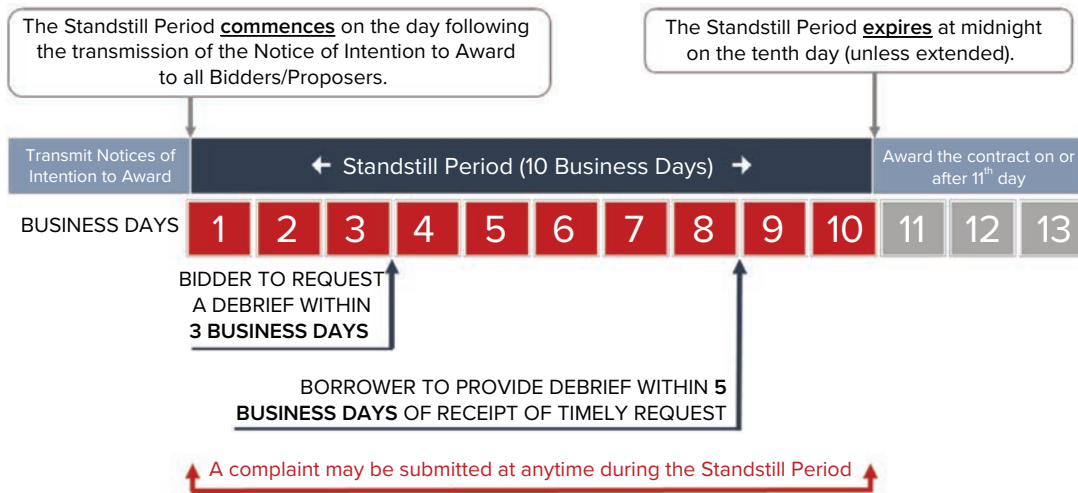
### *Standstill Period*

The Standstill Period is a period of at least ten business days following transmission of the Notification of Intention to Award and before the Award of Contract takes place.

During this period there is a pause in the process, during which the Borrower is prohibited from entering into a contract with the successful Bidder or Proposer.

The purpose of the Standstill Period is to allow unsuccessful Bidders or Proposers an opportunity to understand why they were not successful, (they may request a debriefing) and to provide them an opportunity to submit a Complaint about the decision to award the contract, if relevant. The key steps in the Standstill Period are illustrated in Figure XI.

FIGURE XI The Standstill Period



There are procedures for Bidders or Proposers to request a debrief, and if appropriate, submit a complaint to the Borrower. The Standstill Period will be automatically extended if a Bidder or Proposer has requested a debriefing on time, but the Borrower has been unable to provide the debriefing within the five Business Day deadline for doing so.

For procurements subject to prior review, the Borrower's draft response to a complainant is submitted for the World Bank's prior review before it is issued to the complainant. For information on the Standstill Period, debriefing, and complaints, see Procurement Guidance, [Procurement-related Complaints](#).

### 1. Expiry of Standstill Period

Upon expiry of the Standstill Period, after complaints have been addressed (if applicable), the Borrower may proceed to award and sign the contract with the successful Bidder or Proposer. The Borrower does this by transmitting a notification of award to the successful Bidder or Proposer.

### 2. Contract Award Notice

The Borrower shall publish a public notice of the award of contract. This is called the Contract Award Notice. There are rules about what information must be included in the notice, reference the *Procurement Regulations*. The notice should be published:

- a. on the Borrower's website with free access, or if not available, in at least one newspaper of national circulation, or
- b. in the official gazette.

For international competitive procurements, the notice must also be published:

- a. on the UN Development Business website, and
- b. on the World Bank's website.

## 7. Manage Contract

Successful delivery of contracts requires systematic planning and monitoring to ensure that both parties to the contract are aware of their responsibilities and perform them in a timely manner. To support these activities, the Borrower prepares a Contract Management Plan. The plan should be finalized before contract implementation starts. The key objectives of contract management are to ensure that the contract is:

- a. delivered on time, at the right place, and in the right quantity
- b. performed to the required specifications, standards, and quality
- c. completed within the agreed price.

For more information, see the Procurement Guidance, [Contract Management, General Principles](#), and [Contract Management, Practice](#).

## Simplified Process for Emergencies and Capacity Constraints

The Procurement Regulations allow greater flexibility and simplification for procurements occurring in relation to emergency situations or when the Borrower has certain capacity constraints. Emergency situations are those in which assistance is urgently needed owing to a natural or man-made disaster or conflict. Capacity constraints may result from fragility or specific vulnerabilities such as a small state may experience. Such situations often merit a quick procurement response to address the emergency or a customized approach to address the capacity constraint.

In these situations, the Procurement Regulations permit the Borrower to tailor its procurement approach to support a fast response. It can determine the most fit-for-purpose selection method, contract arrangement, and market approach option that will deliver the best possible procurement result in the response time required. For example, it is possible to use UN Agencies to deliver results on the ground. The Bank may also provide HEIS to supplement the Borrower's procurement capacity.

For further details, see Bank Guidance, [Situations of Urgent Need of Assistance or Capacity Constraints](#).

## Debriefs and Complaints

The World Bank focus is on good quality procurement done well. However, not everything always goes to plan. Sometimes your experience may not be what you expected.

If you have feedback or concerns about a procurement process, raise it with the Borrower directly. If you are not satisfied with the response, you may submit a formal complaint to the Borrower. The handling of complaints in relation to Operations Procurement is governed by the Procurement Regulations. The process is more fully described in Procurement Guidance, [Procurement-related Complaints](#).

It is important that Bidders and Proposers have confidence that the World Bank's procurement procedures are followed, and that they have the right to challenge a Procurement Document, process or decision, where they feel that there has been a breach.

The approach to resolving procurement-related complaints has significantly improved because of the Procurement Regulations and Guidance. To make it fairer to Bidders and Proposers greater emphasis has been placed on managing complaints during the procurement process. In particular, the Standstill Period provides a pause in the process which allows Bidders the opportunity to seek feedback on why they have not been successful, and if appropriate, to submit a complaint in relation to the decision to award the contract. The award of contract cannot proceed until all duly submitted complaints have been addressed.

## More Information

Further information on Operations Procurement is provided in the Annexes A, B and C.

An extensive library of good practice procurement guidance is also available on the webpage [Procurement Framework for IPF Projects](#).

The World Bank also regularly engages with Sellers. Outreach may be in the form of a public webinar, or a face-to-face business engagement event.

E-learning modules are also publicly available to those who wish to learn more about Operations Procurement Framework. See [www.procurementlearning.org](http://www.procurementlearning.org)



# Corporate Procurement

## Introduction

The World Bank Group (WBG) spends around USD \$2B annually for goods, services, works and consulting services for its own requirements in its Headquarters in Washington DC and offices in over 130 global locations, and for requirements to support its global lending operations. These procurement activities fall within the functional authority of the WBG Corporate Procurement. The Corporate Procurement Unit is responsible for the coordination and oversight of sourcing strategy, solicitation, selection, negotiation, and execution of contracts, managing third-party risk and sustainability objectives of the WBG.

## Key Principles

In Corporate Procurement, we recognize that every purchase we make is a vehicle for change that supports the WBG's priorities. The goal of the WBG's procurement process is to ensure that best total value is achieved when procuring goods and services while at the same time supporting the WBG's operations and mission. Ensuring the achievement of best total value and the impartial and equitable treatment of third parties requires four guiding principles that underlie the Bank's procurement process. These are:

1. Fairness
2. Transparency
3. Competition
4. Value.

These principles are employed globally in all procurements and represent the strategic elements that guide the WBG's activities in procurement and contracting practices.

## Mission

Corporate Procurement's mission encompasses:

- Commerciality:** Deliver best "value for money" supply solutions measured by cost, quality and speed.

**Risk Management:** Predict, mitigate and manage third-party related risks to protect WBG's interests.

**Sustainability:** Develop environmentally and socially sustainable supply chains.

## What We Buy

Figure XII provides examples of what the WBG buys. A more detailed list of goods and services we procure is provided in Annex D.

**FIGURE XII** Examples of What the WBG Buys

		
Corporate Services & Real Estate	Human Resources & Professional Services	Technology
<ul style="list-style-type: none"> <li>■ Construction and Renovation</li> <li>■ Facilities Management</li> <li>■ Security Services</li> <li>■ Travel</li> <li>■ Health Services</li> <li>■ Corporate Services</li> <li>■ Food, Conference &amp; Events Services</li> </ul>	<ul style="list-style-type: none"> <li>■ Operational Consulting</li> <li>■ Management Consulting</li> <li>■ Training and Coaching</li> <li>■ Global Payments</li> <li>■ Audit and Accounting Services</li> <li>■ Insurance and Brokerage</li> <li>■ Health and Compensation Benefits</li> <li>■ Executive Searches</li> <li>■ Labor and Staffing</li> </ul>	<ul style="list-style-type: none"> <li>■ IT Compute Infrastructure</li> <li>■ Telecom and Network</li> <li>■ Office Productivity Software &amp; Hardware</li> <li>■ Business Applications (Fintech, HR, General Services)</li> <li>■ IT Software (General/Enterprise Software, Security, Data Analytics, Application Mgt)</li> <li>■ Bank Operations ICT Solutions</li> <li>■ Disruptive Technologies</li> </ul>

## Policies and Procedures

Corporate Procurement sets policies, procedures, and standards designed to provide an appropriate balance between the institutional requirements and the needs of the business managers. A Corporate Procurement [Policy Summary](#) has been prepared for potential suppliers to assist in understanding these policies and procedures, and provide information on how to do business with the WBG.

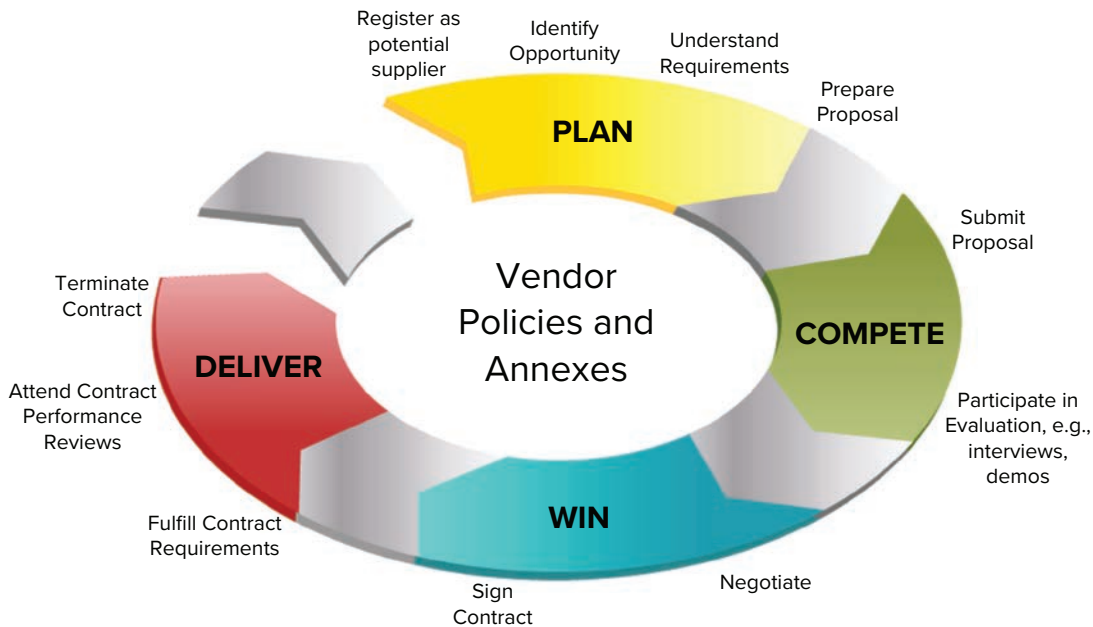
The Policy Summary is based on the WBG's internal governing policies comprising directives and procedures that govern all procurements made by the WBG.

## Procurement Process Overview

While each procurement is unique, they broadly follow a similar process. Figure XIII. shows the common stages of the procurement process and their usual sequencing.



FIGURE XIII Corporate Procurement Process



## Third Party Registration

WBG procurements are open to competition from third parties in all countries. This is subject to the third parties being eligible and legally able to conduct business in the country of performance or delivery. All parties interested in conducting business with the WBG must go through the registration process.

Third parties interested in providing services to the WBG and which are not already registered and approved by the WBG need to complete an application to become a potential supplier. This potential supplier is required to submit information including beneficial ownership, and financial information to help the WBG assess the qualifications of the entity. Completion of the potential application form will not result in the entity being added as a fully registered third party to the WBG. However, it will enable the entity to participate in solicitations through the WBG's eProcurement systems and will make the entity's information available in the database to WBG staff looking to identify potential providers for future business opportunities. For more information on how to register visit the [Potential Vendor Registry](#) webpage.

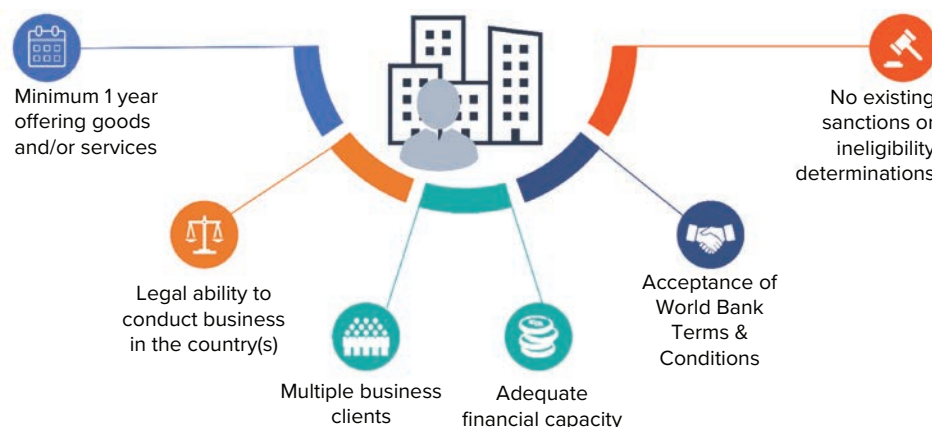
## Eligibility

The registration process involves verifying that the third party conforms to the [Vendor Eligibility Policy](#). Third parties must meet specific eligibility requirements.

Eligibility Criteria include:

1. The third party has been offering goods/services under the business name for a period not less than one year.
2. The third party has multiple business clients and the financial capacity to provide the goods and/or services.
3. The third party can legally conduct business in the country/countries for which it is registering and where work is to be performed or goods delivered.
4. Consistent with the WBG's policy on anti-money laundering and combating the financing of terrorists, third parties listed on the [UN 1267 sanctions list](#) are ineligible to be WBG Vendors and to receive WBG contract awards.
5. Ineligibility due to integrity risks. Third party Integrity Due Diligence screening includes owners, officers, beneficial owners (25% or more of control), politically exposed persons (PEP), and third parties (consultants, agents, subcontractors) and extends to, among other things, negative news (criminal activities and civil proceedings), and political influence.
6. Third parties debarred from contracting with the WBG as [Non-Responsible Vendors](#) or entities included on the World Bank [Listing of Ineligible Firms and Individuals](#) are ineligible to be WBG vendors and/or receive WBG contract awards. Such third parties are also ineligible to provide services as subcontractor or key personnel through another vendor. Third Party eligibility criteria are illustrated in Figure XIV.

**FIGURE XIV** Third Party Eligibility Criteria



## Joint Ventures and Consortiums

The World Bank Group **does not** enter into contracts with multiple parties under joint ventures or consortiums. Where third parties agree to collaborate in order to enhance their qualifications, the

Bank Group engages with the lead third party which submits the bid/proposal. Other collaborating entities may be named as subcontractors or may provide key personnel. The entity with which the contract is entered into is responsible to fulfil all the duties and obligations under the contract.

## Solicitation Process

### Best Value

The WBG bases procurement decisions on best value. This is defined as the outcome that provides the optimal combination of elements such as:

1. lowest total cost of ownership
2. technology, innovation and efficiency
3. assurance of supply
4. quality
5. any other factors relative to the WBG's needs.

### Solicitation Documents

The WBG promotes open competition through its procurement process using a variety of traditional solicitation tools such as RFQ, IFB, RFP, etc. Solicitation may be by invitation or advertisement. The solicitation may include, based on the goods and services being acquired, the following options:

1. Specifications
2. Statement of Work
3. Terms of Reference
4. Performance Work Statement
5. Price sheet
6. Questionnaire
7. Proposed contract terms and conditions
8. Evaluation Criteria
9. Any other necessary information.

Opportunities may be by:

1. invitation to a sufficient number of third parties to ensure adequate competition
2. through open advertisement.

## Value Thresholds

Solicitations for contracts valued at USD 250K or more, and, in the case of operational consulting at USD 50K or more are advertised.

Advertisement might not always be appropriate depending on the various market and local conditions the WBG operates in, or risks involved by advertising proprietary information.

## Search for Business Opportunities

Business Opportunities are publicly advertised in the Corporate Procurement website under [Identifying Business Opportunities](#).

## Express Interest

To express interest in any business opportunity third parties are advised to:

1. review the information provided on the Corporate Procurement [website](#)
2. check the [eligibility criteria](#) and register as a potential supplier, if not already registered
3. follow all instructions in the Procurement Documents/system when submitting their expression of interest.

## Bids and Proposals

Submission of quotations, bids or proposals is to be in accordance with the instructions contained in the solicitation document. The WBG, at its sole discretion, reserves the right to reject any quotation, bid or proposal without recourse.

Reasons for rejection include:

1. the quotation, bid or proposal was received late i.e., past the due date and time as specified in the solicitation document
2. WBG determines that the total price, or prices for individual line items, to be unreasonable or unbalanced
3. the bidder fails to furnish a bid guarantee (if required)
4. the quotation / bid / proposal is not responsive to the content of the solicitation
5. the solicitation has been cancelled for WBG business reasons.

In submitting a quotation, bid or proposal third parties should read the solicitation documents carefully as they will include specific instructions on:

1. how to prepare the submission
2. all information and documents to be provided
3. the deadline for submission
4. the process for submitting the quotation, bid or proposal
5. who to contact in case of questions regarding the solicitation.

Some solicitations may include a pre-proposal conference. In such case, the solicitation document will state whether attendance is mandatory or not.

Time will be provided for third parties to submit questions or requests for clarifications prior to the solicitation closing date.

## Contract Award and Contract Management

On the completion of a solicitation process, all third parties who submitted proposals and participated fully in the process, are notified of the outcome, including the name of the awardee.

A third party should not start to perform services or deliver goods until a contract or purchase order has been issued by the WBG. Third parties must not enter into any oral agreements with WBG staff as staff have no authority to enter into oral contracts and accordingly, any such agreements are not binding on the WBG. This includes oral discussions regarding modifications to an existing contract. Third parties must not perform services beyond the scope of an existing contract without receiving a contract modification issued by Corporate Procurement.

Effective contract management is vitally important to ensure the objectives of the contract are achieved and that the rights, obligations and interests of both parties to the contract are maintained. WBG staff have an obligation to manage the contract to ensure that performance standards and key performance indicators are met, and any performance issues are dealt with in a timely manner, in accordance with the contract terms. Staff also ensure that deliverables are complete, timely and of the expected quality, and that payments are made for accepted deliverables.

The third party has the responsibility of providing the required resources to effectively deliver the services and must report any changes in key personnel or other factors that affect the third party's ability to perform the services. Third parties must submit completed deliverables and address any comments from WBG staff in a timely manner. Failure to adhere to these obligations may result in termination of the contract. As some contracts are funded through donor Trust Funds with defined expiry dates, failure to complete and submit the deliverables in accordance with the schedule provided in the contract may lead to significant delays in payment.

Upon termination of a contract, except for contractual obligations (e.g., related to indemnification and confidentiality, etc.) the relationship between the WBG and the third party comes to an end therefore no services are to be performed after the contract end date.

## Advance Payments

Third parties are not entitled to receive advance payments under a WBG contract. Where mobilization advance is requested at contract signing, that amount shall not exceed 10% of the contract amount and the third party must justify why an advance payment is required and/or reasonable. Depending on the amount of the requested advance, the third party may be required to provide a bank guarantee prior to disbursement of the advance.

## Publication of Contract Award

Under WBG information disclosure policies, certain Corporate Procurement contract awards are eligible for public disclosure. When an award is disclosed, information is made available on the World Bank website under [Contract Awards which includes:](#)

1. the name of the third party receiving the award
2. a brief description of the goods or services
3. the contract award amount
4. date of contract award
5. Third Party's country of registration

The Third Party's proposal and contractual documents remain confidential and not subject to disclosure.

## Third Party Risk Management

### Risks

Procurement transactions carry an inherent risk related to the scope of the particular project and the impacts of the geopolitical events and the global supply chain. Key risk domains include information security, privacy and business continuity. Other risks that arise out of the WBG's contractual relationships with third parties, include integrity, concentration and dependency, process complexity, and industry health and volatility. Environmental, social and governance impacts are reviewed, assessed, and mitigated by Corporate Procurement and Business Units at a portfolio level and/or in the context of the category marketplace.

Through its Third Party Risk Management program, Corporate Procurement reviews, assess and mitigates the risks that are relevant to the WBG. In doing so, Corporate Procurement seeks to manage risk exposures across the WBG in a consistent, objective, practical, and sustainable manner to facilitate the achievement of the WBG institutional goals.

## Ethics and Standards

### Business Ethics

The WBG's procurement activities must be conducted in a manner above reproach, with complete impartiality and with no preferential treatment.

Third parties must adhere to the highest standards of moral and ethical conduct and not engage in any form of integrity violations, including, but not limited to, fraud, corruption, coercion, collusion, and obstructive practices. Third parties must not offer or provide any gifts, favors, entertainment, hospitality, or any other benefits to a WBG staff member or their family members.

### Sanctions and Debarment

As a public organization that manages public resources, the WBG aims to meet the highest standards of integrity and competency and requires the same from those who work for or with it. The suspension and sanction of third parties who engage in sanctionable practices serve this purpose. Third parties found to have engaged in fraudulent or corrupt practices will be excluded either permanently, or for a specified period of time, from receiving future contract awards from the WBG. The WBG will typically post publicly the names of excluded third parties with the basis for that determination.

The WBG also cross-debars third parties debarred by other multinational development agencies.

### Vendors Code of Conduct

Corporate Procurement sets out minimum standards of conduct expected from WBG third parties in the [Vendors Code of Conduct](#). This Code is part of the Vendor Policies. The Code is applicable to third parties and their entire supply chain. Failure to comply with the Code of Conduct may preclude third parties from being eligible for a contract award or may result in a contract being terminated.

Third parties whose employees perform work on WBG premises are subject to additional standards set out in the [Code of Conduct for On-site Vendor Employees](#).

### Conflicts of Interest

The general rule is to strictly avoid any real or apparent conflict of interest in the WBG's third party relationships. This includes restrictions on third parties in which WBG staff have a financial interest or a personal or professional interest. Where it is identified that there is a real or apparent conflict of interest of staff with relationship to a third party, the staff and third party have a duty to disclose this to Corporate Procurement so that the appropriate measures can be taken to address the conflict. Depending on the nature of the conflict, measures may include exclusion of the third party from participating in solicitations or receiving WBG contracts during, and up to 12 months after the end of the staff member's appointment with the WBG.

Involvement of a third party and any of its subcontractors or key personnel in any way, directly or indirectly, with the preparation of the design, specifications and/or other documents used as a part of a solicitation constitutes a conflict of interest which must be declared, prior to participation under the solicitation.

Third parties are required to provide professional, objective, and impartial services without consideration for future work. Third parties must avoid undertaking other assignments that constitute an actual or apparent conflict of interest with services being provided under a WBG contract. If, at any time during the contract term, the third party discovers either an actual or potential conflict of interest with respect to the contract, prompt disclosure in writing is to be made to the Chief of Corporate Procurement, which must include a description of the action/s which the third party has taken or proposes to take to avoid, eliminate or neutralize the conflict.

## Environmental Social and Governance

Corporate Procurement utilizes a Sustainable Procurement Framework to guide corporate procurement practices and policies for greater social, environmental, and supplier diversity and inclusion impact. All third parties are required to adhere to WBG policies on responsible business practices, with products and services with significant sustainability impacts, or those procured in large amounts, facing additional Evaluation Criteria.

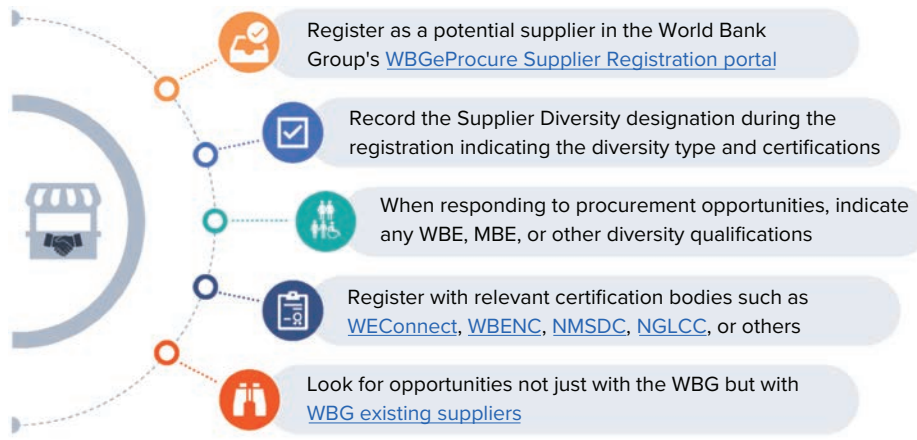
Corporate Procurement seeks not only to mitigate environmental and social impacts from global purchasing, but achieve positive sustainability outcomes related to climate, supplier diversity and inclusion, and other areas. More information can be found on the [Corporate Procurement website](#), or the [Bank's Sustainability Review](#).

## Supplier Diversity

The WBG is committed to promoting supplier diversity and inclusion, with a focus on increasing the participation of underrepresented business enterprises in the procurement process. A diverse and inclusive third party base brings different perspectives, innovative solutions, and a resilient supply chain. The WBG's supplier diversity program currently addresses Women Business Enterprises (WBE) and Minority Business Enterprises (MBE), and they recognize diverse business accreditations from third-party certification organizations. The WBG closely monitors processes and practices and has set performance goals to measure progress and effectiveness of the supplier diversity program.

The WBG expects third parties to adhere to the same values of equity, diversity, and inclusion and provide increased opportunities for access and growth of diverse businesses within their supply chain. Corporate Procurement encourages third parties to directly engage with diverse businesses as sub-contractors or suppliers and report back to the WBG the results of these efforts on a regular basis. The WBG conducts a diverse spend reporting exercise each fiscal year to calculate the tier 2 spend with woman-owned, minority-owned, and other diverse supplier groups. Actions diverse suppliers may take are summarized in Figure XV. For more information on the Tier 2 Diverse Spend Reporting exercise, vendors can refer to the [Tier 2 Supplier Diversity Guidance Note for Vendors](#).



**FIGURE XV** Actions Diverse Suppliers May Take

## Complaints, Debriefs and Protests

### Complaints

Complaints related to any ongoing corporate procurement solicitation must be submitted in a timely manner. During a solicitation process, third parties should inform Corporate Procurement (through the procurement staff identified in the solicitation document or the [Corporate Procurement Help Desk](#)) if they believe the specifications or other solicitation requirements are faulty, unnecessary, or inhibit competition, so that any valid issues can be addressed during the appropriate phase of the process.

Any allegations of fraud or corruption related to a procurement process may be reported to the WBG's [Integrity Vice Presidency \(INT\)](#). The complainant will need to provide adequate detail to enable the investigators to evaluate the complaint. All submissions to INT are handled in strict confidence. Complainants may choose to remain anonymous.

### Award Debriefing and Protest Procedures

Award debriefing and protest procedures are described in detail in section 16 of the [Corporate Procurement Policy Summary](#)

These procedures are available only to third parties who participated in a WBG competitive solicitation and who were not awarded a purchase order or contract.

Award debriefing and award protest procedures are not available to third parties who did not participate in the solicitation, nonresponsive or late responders, or when the solicitation was cancelled by the WBG.

Debriefs are not provided at the expression of interest (EOI) phase of a solicitation process. During this phase of the process, the WBG evaluates submitted EOIs and shortlists the third parties which

best meet the criteria set out in the solicitation documents. The WBG typically receives large numbers of responses to requests for expression of interest (REOI).

## Debrief

The WBG does not routinely debrief unsuccessful third parties. However, a debriefing may be conducted upon written request from an unsuccessful participant. The purpose of the debriefing is to provide feedback on the third party's proposal so that future proposals may better meet the WBG's requirements or be more competitive. The scope of the debriefing is to identify the technical deficiencies or weaknesses of the third party's proposal. Debriefings do not discuss:

- the proposals submitted by other third parties;
- proprietary information including the methodology or approach submitted in other proposals;
- financial or cost information submitted in other proposals;
- evaluation scoring; or
- the ranking of the third parties.

## Protest Procedures

An unsuccessful third party that wishes to submit a protest must inform the Chief, Corporate Procurement in writing of the basis of the protest within 10 business days (the "Notice Period") of the WBG's issuance of the solicitation, addendum, notice of award or other action of the WBG related to the solicitation.

Protest notifications that are submitted after the 10-day Notice Period or that do not indicate a basis for the protest are not entertained.

Protest notifications must include the following information:

1. the protestor's name, address, telephone number, fax number, and email address
2. the WBG solicitation number
3. a detailed statement of all factual and legal grounds for the protest and an explanation of how the protestor was prejudiced
4. copies or relevant documents supporting the protestor's statement.

In response to a written protest from an unsuccessful third party, the Chief, Corporate Procurement

1. provides the protestor with a written acknowledgement, and
2. conducts a review of the protestor's allegations
3. provides the protestor with formal written notification of the decision and the basis upon which it was made.

A decision will be final and conclusive unless, within 10 business days from the date of receipt of the decision, the protestor files a written appeal with the Chief, Corporate Procurement. The Chief, Corporate Procurement will review the appeal and make a final and conclusive determination.

## Additional Information

For additional information reference:

Annex D – Corporate Procurement - What We Buy

Annex E – Corporate Procurement - Tips for Bidding

Annex F – Corporate Procurement - Who's Who



## Operations Procurement – Tips for Bidding

This Annex provides general tips on how you can make your Bid for World Bank financed Operations Procurement more attractive, starting from making a pre- Bid or Proposal visit, preparing a responsive Bid and what to check for at Bid opening among other things. See also Annex B for a useful Bidders checklist.

### Preparing a Bid or Proposal

- Understand the procurement's objectives and the procurement strategy the Borrower is using to select the Most Advantageous Bid or Proposal.
- Examine carefully the Evaluation Criteria, as this will be used to determine the Most Advantageous Bid or Proposal. If you can meet or exceed this then you have a good chance of winning if not, then consider carefully whether you should go to the time and expense of Bidding.
- Make a pre- Bid or Proposal visit (if indicated) on the date and at the venue/s indicated by the Borrowers in the Procurement Document.
- For Consultant Services - address Terms of Reference fully.
- For Goods, Works, and Non-consulting Services you must respond substantially to technical specifications, or your Bid will be disqualified.
- Carefully review qualification and Evaluation Criteria: Failure to satisfy qualification criteria (including SOE eligibility criteria) results in high Bid rejection rate.
- Where the Evaluation Criteria require that you explain the methodology that will be used to deliver the project, make sure you provide a full explanation of the processes, and in the level of detail required.
- Where Rated Criteria are used, make sure you address each criteria and sub-criteria (if any). Be specific in how your Bid or Proposal will address the criteria and tailor the extent of your response to the weightings assigned.
- Where the Rated Criteria award extra points for innovation, provide a description of the type of innovation that you could bring to the project, how it would apply in the context of the project, and specifically how the project would benefit.

- Propose a strong Project Manager and qualified experts.
- In establishing your credentials, cite relevant technical and regional experience which is similar to the project or assignment. The more significant and similar the better.
- Where appropriate, consider if a joint venture would benefit the Bid or Proposal.
- Follow the requirements detailed in the Borrower's Procurement Document and do not deviate from the conditions or requirements.
- Get official clarification if required. If any provision of the Bidding/Proposal document is unclear or unacceptable, submit an official inquiry in writing to the Borrower and copy the World Bank. Details of how to submit a clarification are set out in the Bidding/Proposal document. You must submit a clarification within the time limit stipulated – which is always before the Bid or Proposal closing date.
- Do not express any conditionalities, or qualifications. These will lead to rejection of your Bid or Proposal.

## Submitting a Bid or Proposal

- Submit a professional Bid or Proposal that addresses all of the requirements in full.
- Ensure that all supporting documents are complete and attached.
- Ensure that the Bid or Proposal is properly signed by authorized individual.

## Common Issues

The following aspects are the most common issues that lead to Bids or Proposals being rejected immediately. Please make sure you do not make a silly mistake that results in your Bid being rejected.

To make your Bid acceptable, it is important to perform final checks on the following items before Bid or Proposal submission:

- Bid Security: check the amount, validity and text are correct.
- Power of Attorney: When used, make sure the signatures in the Bid or Proposal are by the person who is authorized through a power of attorney.
- Joint Venture: If the Bid or Proposal comprises a Joint Venture, ensure that the Joint venture agreement is attached to the Bid or Proposal.
- References: Ensure that all references are relevant and attached to the Bid or Proposal.
- Discounts: Ensure that any Discounts are stated in the covering letter, or in an appropriate place as specified in the bidding document.

- **Envelopes:** It is essential in a two-envelope process to keep the Technical part of the Bid or Proposal separate from the Financial part. The bidding documents will provide details of how to mark these envelopes. Ensure that you separate these parts of the Bid or Proposal and mark envelopes 'Technical' and 'Financial,' as appropriate.
- **Bid or Proposal submission:** Check the requirements for the submission of your Bid or Proposal. Specifically, the date when it must arrive, and how it is to be addressed. Ensure that you plan and organize to get your Bid or Proposal submitted on time. Late Bids or Proposals will be rejected. you have organizational arrangements in place to meet these requirements.

## Bid or Proposal public opening

Where there is a public opening of the Bids or Proposals, details will be stipulated in the bidding documents. During a public opening, you can expect the following to happen:

- all Bid or Proposals will be opened
- the presence, or not, of a bid security is be stated, and where there is a Bid security the amount is read out
- the whole process is recorded in writing
- the record is signed by all Bidders or Proposers present and by the Borrower's implementing agency representative.

**Extensions:** Be aware of possible extensions. There may be a request to extend the Bid validity and Bid security periods by several months, where, for example, the evaluation of Bids requires more time than originally expected.






## Operations Procurement – Checklists

To assist you in preparing a Bid or Proposal we suggest the following checklist is used. It can be part of your internal quality assurance process when preparing your Bid or Proposal. Using these checklists will help to ensure you avoid making some of the more common mistakes.

### Checklist #1 - Preparing a Bid or Proposal

Checklist – Preparing Bid or Proposal	
Do you fully understand the procurement's objectives?	
Do you fully understand the procurement strategy for selecting the Most Advantageous Bid or Proposal?	
Do you meet or exceed the qualification and Evaluation Criteria or not?	
Have you arranged to attend the pre-Bid or Proposal meeting (if one is being held)?	
For Consultant Services: did you address Terms of Reference fully?	
For Goods, Works, and Non-consulting Services: did you respond substantially to technical specifications?	
Did you emphasize your methodology for delivery? Where innovation is requested, did you innovate if you could?	
Did you propose a strong Project Manager and qualified experts?	
Did you cite relevant technical and regional experience similar to the assignment?	
Are you involving Borrower partner consulting firms or individual Consultants?	
Have you considered joint ventures?	
Are you proposing any deviation from Borrower's Procurement Document conditions or requirements?	
Did you ask for and receive any official clarifications, if required?	
Confirm there you have no conditionality's or qualifications?	
Have you included all supporting documents required?	
Has the submission signed by authorized individual?	

## Checklist #2 – Submitting a Bid or Proposal

Checklist – Submitting a Bid or Proposal	✓
Is the amount, validity, and text of the Bid Security correct?	
Is the person signing authorized through a power of attorney?	
If submitting a joint venture, is the Joint Venture Agreement enclosed?	
Are all relevant references enclosed?	
Are all discounts stated in the covering letter, or in an appropriate place as specified in the Borrower's Procurement Document?	
Have all of the envelopes been marked correctly, using the appropriate term of "Technical" or "Financial" envelope?	
Do you fully understand when, where and how the final Bid or Proposal will be submitted and have organizational arrangements in place to meet these requirements?	

# Operations Procurement – Who's Who

## Operations Procurement

Operations Procurement is delivered through two separate organizational structures:

### 1. OPCS Procurement

Sets policy, provides oversight and supports good practice.

### 2. Procurement Operations Support

Supports Borrower's in undertaking Bank-financed operations procurement.

## 1. OPCS Procurement

### Operations Policy and Country Services (OPCS) - Procurement Team

OPSC Procurement team is responsible for:

- managing the World Bank's Procurement Framework
- developing and maintaining the suite of Standard Procurement Documents (SPDs)
- leading the development of operational procurement policy
- providing procurement oversight to major projects
- developing good practice guidance, tools and templates
- developing and delivering training on new policy initiatives
- providing outreach to Sellers and other stakeholders
- coordinating with other Multi-Lateral Development Banks.

## Team Leadership

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**Position Vacant** (please contact either Lead Specialist listed below.)

**Chief Procurement Officer**

Operations Policy and Country Services

Leads and manages the procurement specialists in OPCS. Sets and manages the Bank's Procurement Framework, and among other things accredits Procurement Specialists to operate, and chairs the Operations Procurement Review Committee.

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**Tesfaalem Gebreyesus**

**Lead Procurement Specialist**

Leads development and oversight of the Standard Procurement Documents, Procurement Regulations, and complex operations matters.

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**Christopher Browne**

**Lead Procurement Specialist**

Industry engagement, business outreach, and complex technical procurement matters.

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## 2. Operational Procurement Support

Procurement specialists provide operational support to Borrower's undertaking Bank-financed procurement. The Bank's six Regions are supported, at an operational level, by nine Procurement Practice Managers and their teams, as follows:

1. Africa - Eastern and Southern
2. Africa - Western and Central (Francophone and Lusophone Africa)
3. Africa - Western and Central
4. East Asia and Pacific - Southeast Asia and China
5. East Asia and Pacific - Indonesia, Philippines and the Pacific
6. South Asia
7. Europe and Central Asia
8. Latin America and Caribbean
9. Middle East and North Africa

It's important to remember that the Borrower's implementing agency should be your first point of contact for all questions on a specific project. However, you may occasionally need to seek clarification or guidance from World Bank Procurement staff.

You can contact any World Bank staff member by calling: +1 202-473-1000

## Practice Managers

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**Elmas Arisoy**

**Practice Manager**

Africa – Eastern & Southern

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**Kofi Awanyo**

**Practice Manager**

Africa – Western & Central (Francophone and Lusophone Africa) (EAWP1)

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**Nazaneen Ismail Ali**

**Practice Manager**

Africa – Western & Central (EAWP2)

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**Hiba Tahboub**

**Practice Manager**

East Asia and Pacific - Southeast Asia and China

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**Diomedes Berroa**

**Practice Manager**

East Asia and Pacific - Indonesia, Philippines and the Pacific

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Simon Chirwa

**Practice Manager**

Europe and Central Asia

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Majed M. El-Bayya

**Practice Manager**

Middle East and North Africa

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Jean-Jacques Verdeaux

**Practice Manager**

Latin America and Caribbean

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Anna L. Wielogorska

**Practice Manager**

South Asia

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## Corporate Procurement – What We Buy

The WBG procures a wide variety of goods and services including, but not limited to:

### Information Technology

- Computer Software and Services
- Computer Peripherals, Accessories and Supplies
- Telephone and Telecommunication Equipment, Accessories and Supplies
- Servers, Routers and other Hardware Equipment
- Video Equipment
- Facsimile Equipment and Supplies

### Communications Equipment and Services

- Communications and Media-Related Services
- Conference Facilities and Related Services
- Video Conferencing Equipment and Supplies
- Library and Archival Equipment, Machines and Supplies
- Interpretation Services
- Translation Services

### Consulting Services

- Advisory Services
- Analytical Work Services
- Capacity Building Services

- Project Appraisal Services
- Research Services
- Third Party Monitoring Services
- Training and Coaching Services
- Management Consulting Services
- Leadership and coaching services
- Information security and technology related services

## Construction and Renovation

- General Construction Services
- Air Conditioning, Heating, and Ventilating: Equipment, Parts and Accessories
- Architectural Services, Professional and Non-Professional
- Building Construction Services, Building Maintenance and Repair Services
- Cafeteria and Kitchen Equipment, Commercial
- Elevators and Escalators
- Energy Collecting Equipment and Accessories
- Engineering Services
- Sewage Treatment Equipment and Services
- Furniture: Office, Cafeteria, Library, Lounge
- Sound Systems, Components, and Accessories
- Steam and Hot Water Boilers, Steam Heating Equipment, Fittings, Accessories and Supplies
- Power Generation Equipment, Accessories
- Power Transmission Equipment - Electrical, Mechanical, Air and Hydraulic

## Facilities Management Services and Equipment

- Food Services
- Security Services



- Cleaning
- Fire, Safety, and Emergency Services
- Art Objects, Equipment and Supplies
- Janitorial Services and Supplies
- Floor Covering, Floor Covering Installation and Removal Equipment, and Supplies
- Floor Maintenance Machines, Parts and Accessories

## Graphic Design, Publications and Print Services

- Graphic Design
- Typesetting
- Writing and Editing Services
- Bookbinding, Rebinding, and Repairing
- Electronic Books
- Signs, Sign Materials, Sign Making Equipment, and Related Supplies
- Printing and Related Services
- Printing Equipment and Supplies
- Publications and Audiovisual Materials
- Periodicals and Subscription Services
- Photographic Equipment and Supplies
- Graphic Arts

## Office Supplies, Paper and Paper Products

- Copiers
- Office Machines, Equipment and Accessories
- Toner cartridges and Supplies
- Office Products
- Envelopes, Plain or Printed



- Paper
- Maps
- Badges, Emblems, Name Tags and Plates, etc.

## Other Administrative Services

- Automotive Vehicles and Accessories
- Charter Airline Services
- Drugs and Pharmaceuticals
- Household Goods and Relocation Services
- Insurance Services
- Moving and Shipping Services
- Temporary Administrative Support Services
- Travel and Related Services

## Corporate Procurement – Tips for Bidding

Here are some general tips on how to prepare and submit a response to a WBG Corporate Procurement business opportunity.

### Initial Assessment of the Opportunity

1. Understand the procurement's objectives and the procurement strategy being using to select the third party.
2. Carefully review any mandatory qualification criteria. Failure to satisfy mandatory qualification criteria results in rejection of the bid/proposal.
3. Carefully examine the Evaluation Criteria, as these will be used to assess the offered solution. If you can meet or exceed these criteria, then you have a good chance of winning. If not, then consider carefully whether you should go to the time and expense of bidding.
4. Attend any pre-bid/proposal conference. The date and time will be stipulated in the Procurement Documents.

### Preparing the Bid or Proposal

1. For Consulting Services – address the Terms of Reference fully.
2. When applicable, concisely present and justify any modifications to the Terms of Reference you would like to propose on how to perform the assignment better and more effectively (e.g., proposing alternate approaches or activities or proposing a different phasing of the activities) as part of the proposal.
3. For goods, works, and non-consulting services you must respond substantially to technical specifications or your proposal will be disqualified.
4. Emphasize your methodology for delivery/performance, this is usually a very important part of proposal evaluation and makes your bid/proposal more or less credible – innovate where you can.
5. Propose a strong Project Manager and qualified experts.

6. Cite relevant technical and regional/global experience that demonstrates your capability to successfully complete the assignment – the more significant and similar the better.
7. If references are requested, ensure they are relevant.
8. If presenting alternatives or equivalents, demonstrate that any proposed deviations are equivalent or superior to the WBG's established requirements. Acceptance of such proposed changes are at the sole discretion of the WBG.
9. Don't deviate from the Procurement Documents or conditions.
10. Get official clarification. If any provisions of the bid/proposal document are unclear or unacceptable, submit an inquiry in writing to the in accordance with the instructions provided in the Procurement Documents.
11. Conditionalities, or qualifications may lead to rejection of your bid/proposal.
12. If a bid security is required, ensure the amount, validity and text are correct.
13. Prepare a professional bid/proposal following the format specified in the Procurement Documents.
14. Confirm acceptance of non-negotiable and mandatory clauses of the WBG's General Terms and Conditions. Requests for material changes to these clauses are at the sole discretion of the WBG and may result in the disqualification from the bid/proposal.

## Submitting the Bid or Proposal

1. Ensure all supporting documents are included in your bid/proposal.
2. Ensure that your bid/proposal is signed by an authorized individual.
3. Ensure envelopes or electronic files are correctly named to indicate the content. Make sure envelopes containing the technical parts and financial parts are clearly marked "Technical" and "Financial."
4. Check the arrangements for the submission of Bids or Proposals - when, where and how they are to be submitted. Plan to ensure that you have organizational arrangements in place to meet these requirements.
5. Follow the instructions for submission of your bid/proposal. For example, if electronic submission is specified, or if hard copies are to be delivered.

## Corporate Procurement – Who's Who

### Corporate Procurement Contact Details:

- [corporateprocurement@worldbank.org](mailto:corporateprocurement@worldbank.org)
- +1 202-458-5858

### Team Composition

The Corporate Procurement team comprises Category Managers with specialized oversight on category areas such as Corporate Services and Real Estate, Human Resources and Professional Services, and Technology.

These specialists understand their product categories and market trends and are responsible for the development of individual category strategies and fostering business partner and supplier relationships.

The team also includes specialists on procurement related areas such as Governance and Third-Party Risk Management, Environmental and Social Governance, Procurement Operations and Client Relations, as well as a Program Management Office.

### Team Leadership

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**Kenny Cheung**

**Chief of Corporate Procurement**  
Strategy Performance and Administration

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Timothy Gross

**Lead Procurement Specialist**

Deputy Chief & Head of Program Management Office



Faith Graham

**Senior Procurement Specialist**

Head of Governance & Third-Party Risk Management



Adam Rubinfield

**Senior Procurement Specialist**

Head of Secretariat & Environmental and Social Governance



Rajiv Parankusam

**Senior Procurement Specialist**

Head of Corporate Services & Real Estate Category



Lily Cheung

**Senior Procurement Specialist**

Head of Human Resources & Professional Services Category



Sanjay Colaco

**Senior Procurement Specialist**

Head of Technology Category

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Vibha Hariharan

**Senior Procurement Specialist**

Head of Chennai & Procurement Operations



Mariya Abroskina

**Senior Procurement Specialist**

Head of Sofia & EMEA Client Relations

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For additional information, such as Standard Procurement Documents (SPDs), Guidance, briefing, training and e-learning materials see [www.worldbank.org/procurement](http://www.worldbank.org/procurement)