



WBG FINANCES ONE

How to Use Finances One to Find
Contract Data and Opportunities

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The World Bank
1818 H Street NW
Washington DC 20433
Telephone: 202-473-1000
Internet: www.worldbank.org

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Office of the Publisher
World Bank
1818 H Street NW
Washington, DC
20433 USA
Fax: 202-522-2422

Email: pubrights@worldbank.org

Common Abbreviations and Defined Terms

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

Abbreviation/Term	Full Terminology/Definition
Bank	International Bank for Reconstruction and Development (IBRD) and/or International Development Association (IDA), whether acting on its own account or in its capacity as administrator of trust funds provided by other donors.
Borrower/ Beneficiary	A recipient of investment project financing (IPF) and any other entity involved in the implementation of a project financed by IPF.
Civil Works	A category of Procurement that refers to construction, repair, rehabilitation, demolition, restoration, and maintenance of civil structures; as well as related services such as transportation, insurance, installation, commissioning, and training.
Consulting Services	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, for instance, management consultants, policy consultants or communications consultants. Advisory and project related Consulting Services include, but are not limited to, feasibility studies, project management, engineering services, finance and accounting services, and training and development.
Contract	A formal and legally binding agreement. Except when used with defined terms such as Contract Manager and Contract Management Plan, the term “Contract” is written as “contract” throughout this guidance.
Donor	The country donating money to the Bank.
Goods	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.
IBRD	International Bank for Reconstruction and Development
IDA	International Development Association
IFC	International Finance Corporation: the private sector arm of the World Bank Group.

Abbreviation/Term	Full Terminology/Definition
Non-consulting Services	Non-consulting Services are normally bids contracted on the basis of performance of measurable outputs, and for which performance standards can be clearly identified and consistently applied such as drilling, aerial photography, satellite imagery, mapping, and similar operations.
IPF	Investment Project Financing: The Bank finances investment projects that aim to promote poverty reduction and sustainable development. IPF supports projects with defined development objectives, activities, and results, and disburses the proceeds of Bank financing against specific eligible expenditures.
Prior Review	The process by which the Bank reviews the Borrower's Bidding Documents and procurement activities that are of high value and/or high risk to determine whether the procurement is carried out in accordance with the requirements of the legal agreement before a contract is awarded.
Post Review	This is an ex-post assessment of the procurement processes for a sample of contracts that are not subject to Prior Review by the Bank. The Bank carries out such reviews to determine whether the borrower complies with the requirements of the Legal Agreement.
Project ID	Each Bank project is assigned and referenced by a project ID (Pxxxxxxx). More than one loan, credit, or grant may be associated with one project ID.
Sectors	All Bank projects are classified by one to five sector(s). A Sector is a high-level grouping of economic activities based on the types of goods or services produced. The UN classification of economic sectors was issued as a point of reference.
STEP	Systematic Tracking of Exchanges in Procurement. This is the system used by Borrowers in all IPF operations subject to the World Bank's Procurement Regulations. Data is entered by Borrowers.
Supplier	An organization or individual that provides a needed product or service. Suppliers are defined by the country in which the Firm/Individual is registered as a legal business entity.
World Bank Group	Represents IBRD, IDA, IFC, MIGA, ICSID

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Introduction

Background

The World Bank Group recognizes that transparency and accountability are essential to effective development and central to achieving its mission to alleviate poverty. The WBG's commitment to openness is also driven by a desire to foster public ownership, partnership, and participation in development from a wide range of stakeholders. As a knowledge institution, the WBG's first step is to share its knowledge freely and openly.

WBG's Finances One is a digital platform that provides clients and partners with access to public financial data and portfolio information from across all Group entities. One of the datasets being published is the procurement dataset, which includes contract award data and procurement notices relating to WBG Project Financed Procurement.

Purpose

The purpose of this Finances One guidance is to assist users in navigating the platform. It:

- a. explains key concepts found in the Finances One platform;
- b. outlines the usage and functionality of the platform when accessing procurement data; and
- c. provides essential information and links to additional information.

This guidance will serve the business community in finding and accessing [procurement opportunities](#) and contract awards data.

Data Source

The current data source is STEP (Systematic Tracking of Exchanges in Procurement; see <https://step.worldbank.org/>), which is used by Borrowers in all IPF operations. STEP is subject to the World Bank's Procurement Regulations. Data is entered into STEP by Borrowers. "Supplier Country" represents the country where the supplier is registered, which may or may not be the supplier's actual country of origin. Information does not include awards to subcontractors, nor does it account for co-financing.

Usability

Version

Currently, the Finances One platform is accessible through any internet capable device (for instance, iPhone, iPad, Android devices, computers, etc.). This guidance focuses in particular on navigating the Finances One platform using a computer.

Getting Started

The platform does not require registration or sign-in to begin use. Sign in is only required when customizing and saving visualizations, or when using some specific options.

To access the Finances One platform:

1. Enter <https://financesapp.worldbank.org/into> a web browser.
2. The main homepage will appear behind a pop-up screen displaying the Terms of Use.
3. Select 'I agree'.
4. Once 'I agree' is selected, the home screen becomes accessible.

Main Display

The following tabs will appear on the homepage:

1. **HOME:** shown above with various analyses, including IBRD/IDA, IFC and MIGA portfolios.
2. **COUNTRIES:** this tab allows users to browse information by country. Selecting a specific country will show that country's WBG's voting status, total projects and commitment amounts, and a list of recently approved projects in that country. Clicking on any highlighted links within will provide detailed information.
3. **SUMMARIES:** this section provides various data analysis on lending, net flows, contract awards, and a list of Tender Notices.
4. **FINANCIAL RESULTS:** this tab offers an overview of the WBG financial results by institution.

FIGURE 1 Finances one main display



5. **DATA:** this section provides publicly available data on Procurement activities, loans & credit, projects, budget, etc, available for exploration and analysis.
6. **ABOUT:** this tab contains information about WBG's Finances One, including its purpose, usage, and limitations.

On the main display, the user has several options to further explore projects, contract data, and active tender notices. This guidance focuses on how to access contract data and active tender notices only.

Accessing Contract Award Summary Charts

From the main display, select the 'Summaries' tab and then select 'Contracts' per figures 2 and 3.

FIGURE 2 Accessing contract awards summary charts

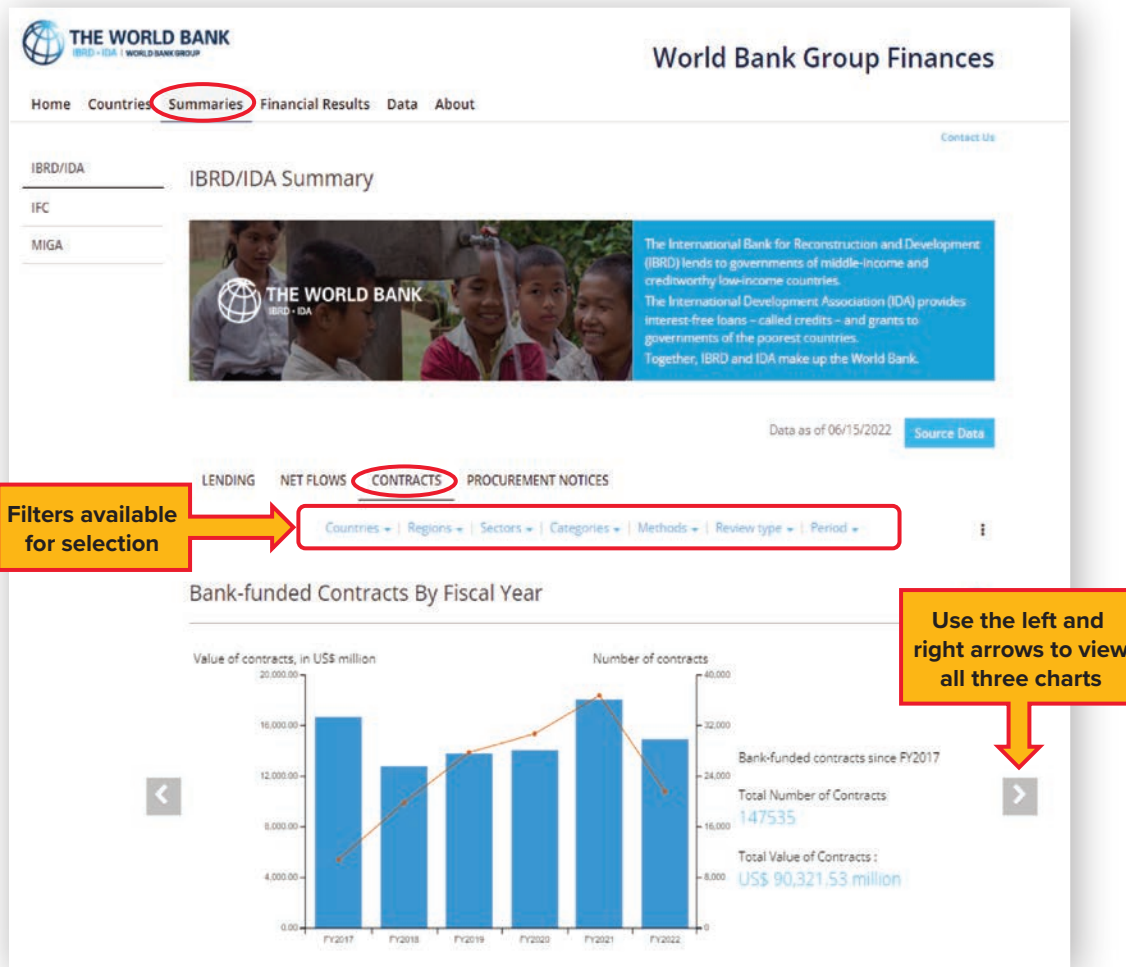
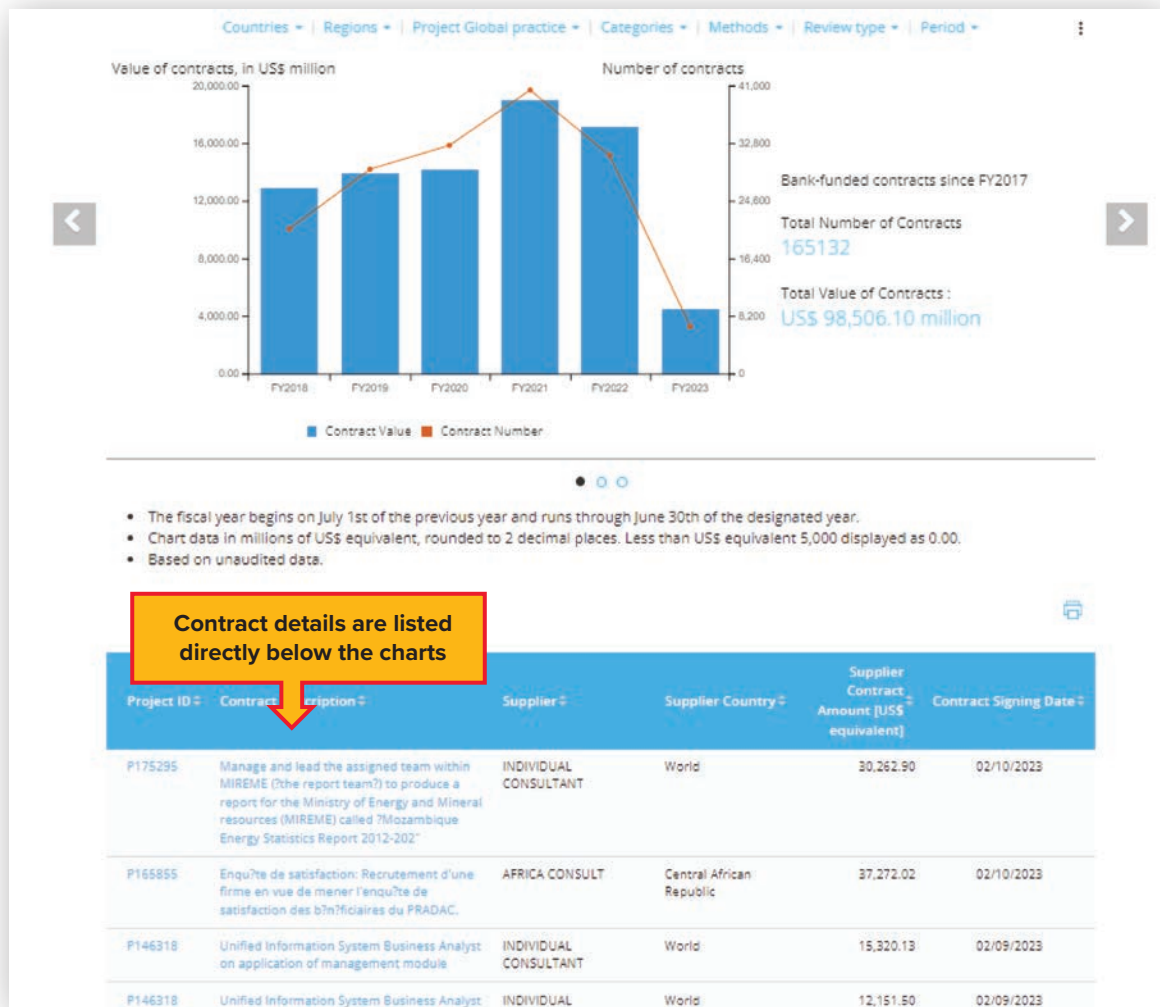


FIGURE 3 Accessing contract awards details



Accessing Tender Notices

From the main display, select the 'Summaries' tab and then select 'Procurement Notices', the screenshot below will be displayed. To find detailed information about a tender notice, click on any highlighted tender 'notice description'.

FIGURE 4 Accessing tender notices

Filters available for selection

Countries ▾ | Regions ▾ | Types ▾ | Sectors ▾ | Categories ▾ | Methods ▾

Click on project # to access project details

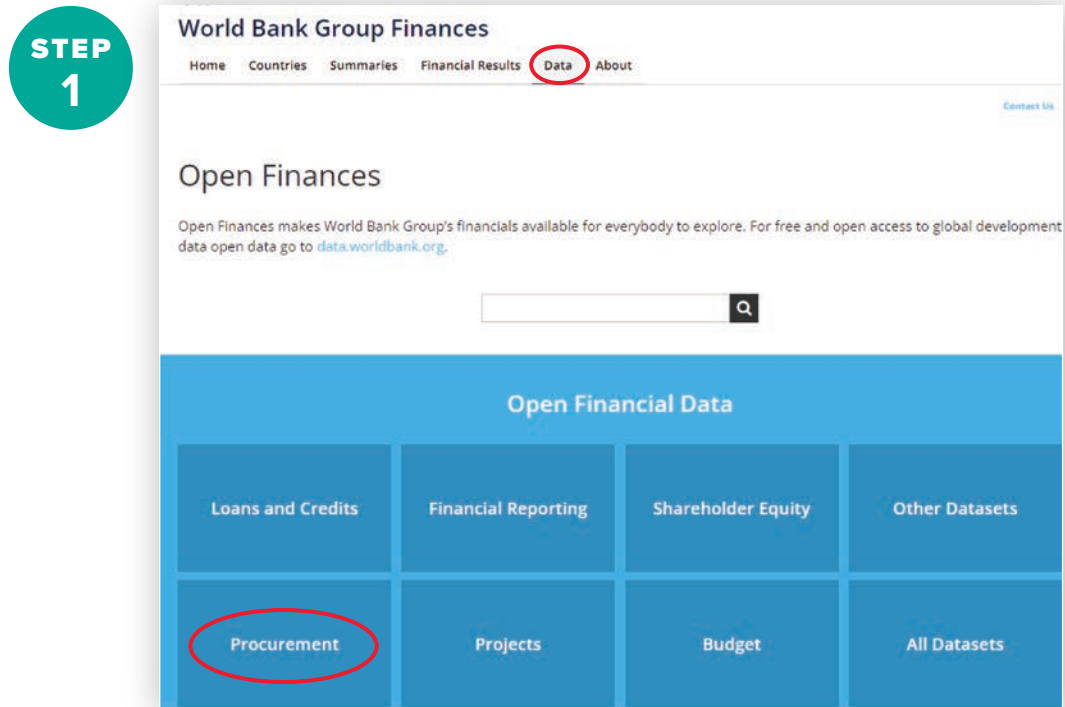
Project ID	Deadline	Notice Description	Countries	Notice Type	Published
P174946	05/16/2022	Consultor Individual Especialista Ambiental y Social	Argentina	Request for Expression of Interest	05/02/2022
P170850	05/16/2022	Contratação de Serviço de Consultoria Especializada de Apoio à Gestão de Inovação, Projetos, Processos e Tecnologia para viabilizar a Transformação Digital do Programa de Outorga 4.0.	Brazil	Request for Expression of Interest	05/02/2022
99	05/31/2022	Heavy Duty Printer	Philippines	Invitation for Bids	05/02/2022
08	05/02/2022	Hiring of Consultancy services for Improving Clinical Competencies and Medical Care Assessment Methods for Human Resources for Health (HRH) in the context of the Mizoram Health Systems Strengthening Project (MHSSP)	India	Contract Award	05/02/2022
26	05/02/2022	Project Coordinator for Project Biyoole Galmudug	Somalia	Contract Award	05/02/2022
P151072	05/02/2022	These are small attachments or material required for modification of existing equipment.	India	Contract Award	05/02/2022
P172399	05/31/2022	LCD projector	Philippines	Invitation for Bids	05/02/2022

Click on highlighted text to open the notice

Accessing Contract Awards Data

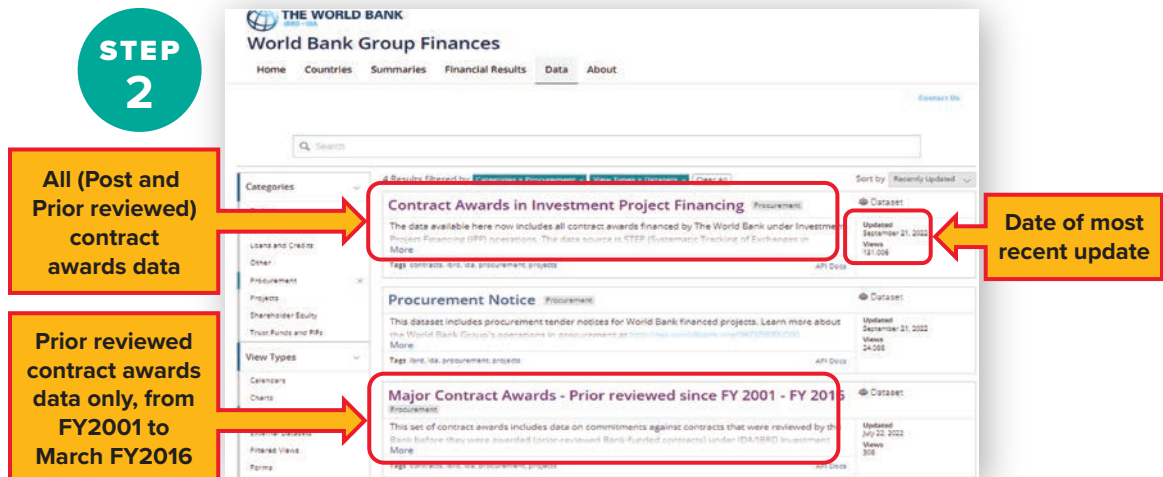
From the main display, click on 'Data' and then select 'Procurement' per figure 5.

FIGURE 5 Accessing contract award data



Once you have selected 'Procurement', a screen with multiple datasets to choose from will be displayed. There are only two datasets related to IPF contract awards as highlighted below. Select one of these based on your need.

FIGURE 6 Main IPF contract awards datasets



Once a dataset is selected ('Contract Awards in Investment Financing' or 'Major Contract Awards—Prior Review'), new options will be displayed for exploration. Click on 'View Data' to access the data table.

Next, click on 'Contract Awards Trend Analysis . . . ' to display a trend analysis by region and year.

FIGURE 7A Data access: Contract award trends

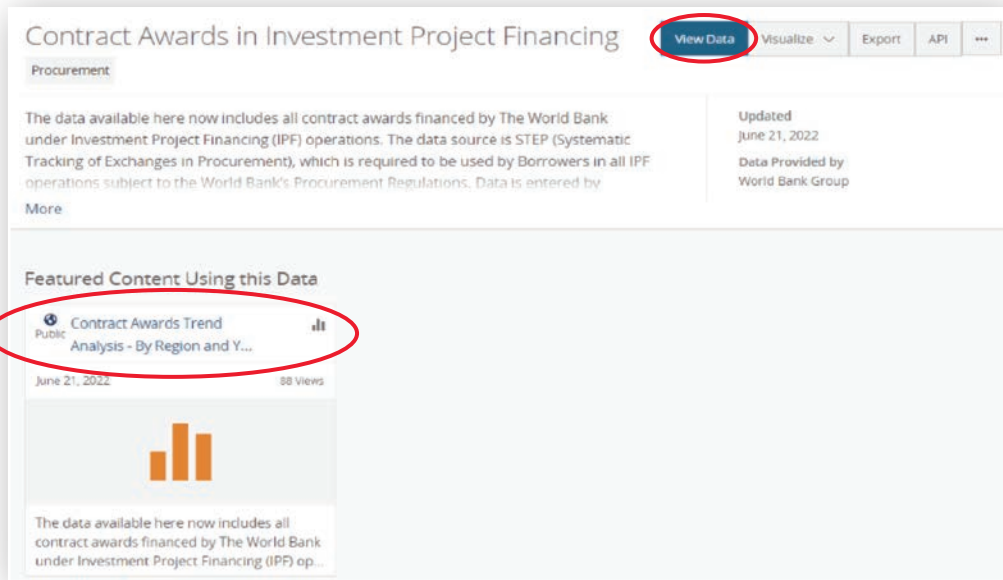
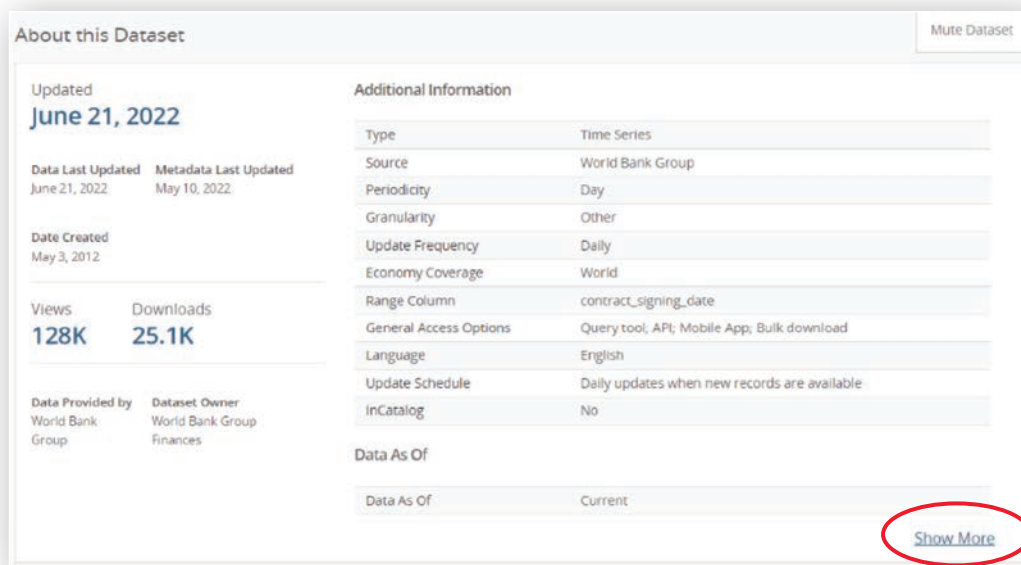


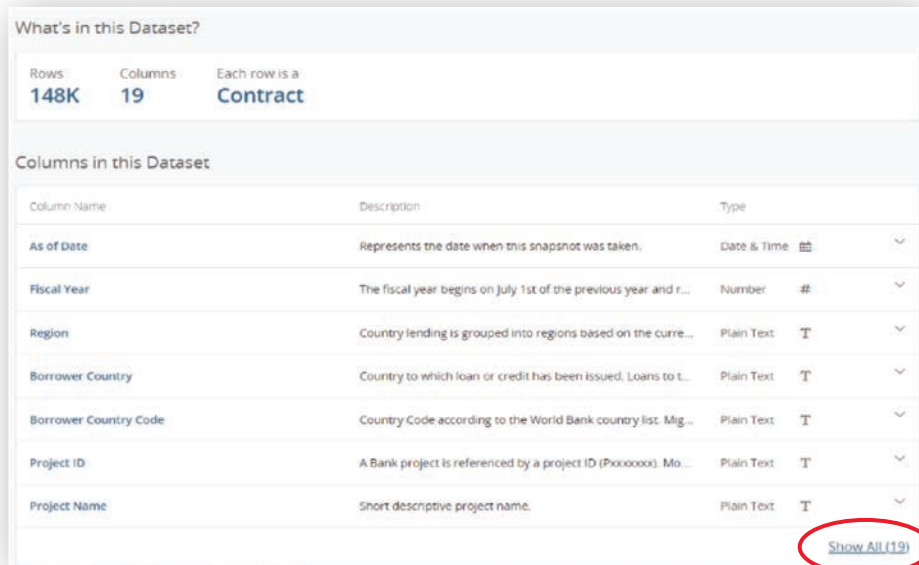
FIGURE 7B Data access: About this dataset



'About the Dataset' provides more information on the dataset. Click 'Show More' to expand the view.

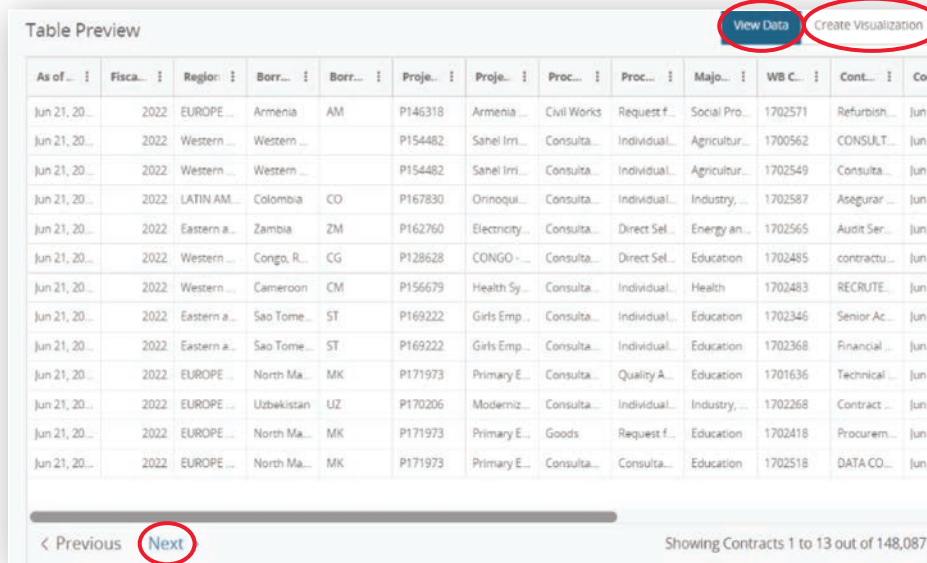
The 'What's in this Dataset' tab, featured in figure 7c, lists out all columns found in the dataset. Click on 'Show All' to see the entire list of variables.

FIGURE 7C Data access: What's in this dataset?



To preview the dataset, select 'Table Preview' per figure 7b.

FIGURE 7D Data access: Table preview



Click 'Next' to scroll through the entire list. To access the whole list of contract awards data, click on 'View Data'. Finally, click on 'Create Visualization' to create a custom visualization based on your needs.

Once 'View Data' is selected as shown in figures 7a through 7d, the data table (figure 8) is displayed with options to select from.

FIGURE 8 Contract award data

STEP
3

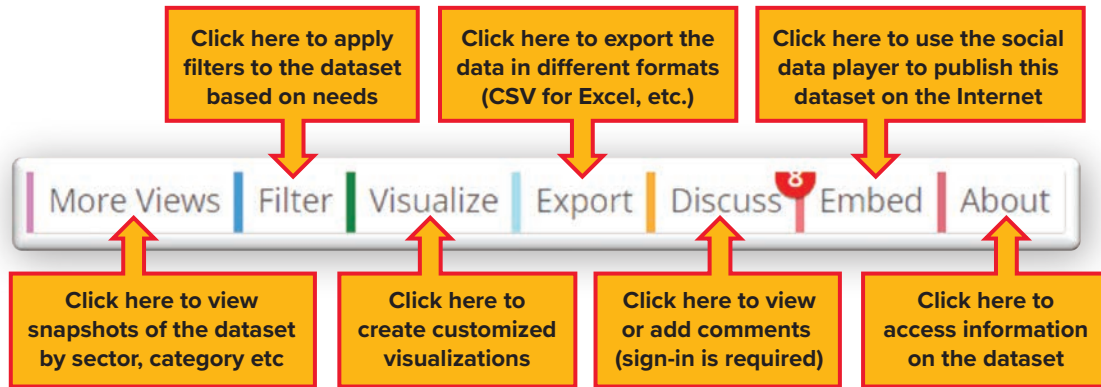
Select 'Return to Grid View' to access more option

Optional buttons (see figure 9)

Move the bar left or right to view all available columns

Additional Options

FIGURE 9 Dataset optional tabs



Using the 'Filter' Option

To use the filter option, click on 'Filter' and a drop down window will appear with options to select from, as indicated below.

FIGURE 10 Adding a new filter

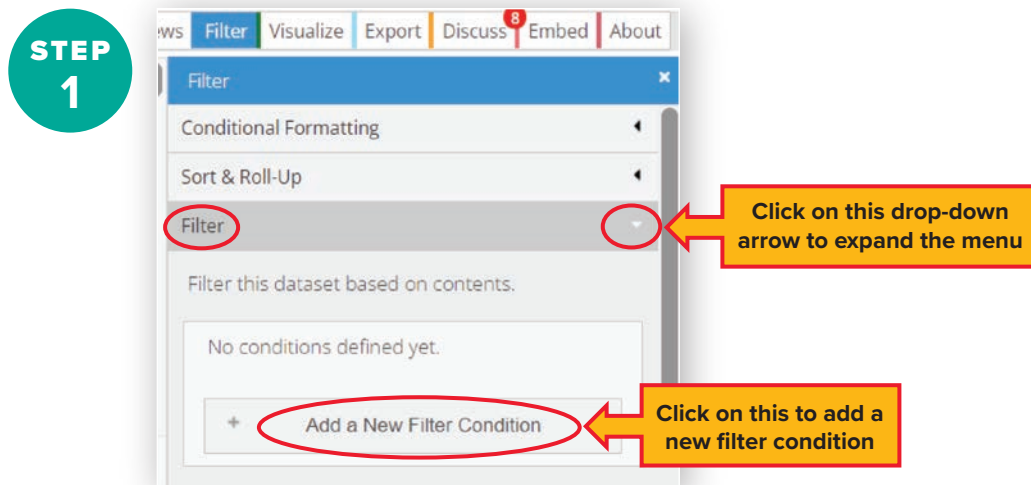


FIGURE 11A Filtering by a specific fiscal year

The figure illustrates a three-step process for filtering data by a specific fiscal year. Each step is accompanied by a numbered callout box with an arrow pointing to the relevant UI element.

- STEP 2:** The user is in the 'Filter' tab. A callout box points to a drop-down arrow next to 'Fiscal Year' in the 'Filter' panel. The text reads: "Click on drop-down arrow to expand. Select 'Fiscal Year' or another preference."
- STEP 3:** The 'Fiscal Year' drop-down is expanded. A callout box points to the 'is' option in the list. The text reads: "Click on the drop-down arrow. Select 'is' to filter by a specific fiscal year."
- STEP 4:** The filter is applied. The 'Filter' panel shows 'Fiscal Year' set to 'is' and a text input field containing '2021'. A callout box points to the '2021' input field.

To filter by multiple years, select 'is between' next to the 'fiscal year' menu, per figure 12.

FIGURE 12 Filtering by multiple fiscal years

The figure illustrates the process of filtering data by multiple fiscal years in the WBG Finances One interface. It consists of two main parts: a close-up of the filter menu and a screenshot of the data table.

Filter Menu Callouts:

- Select 'Fiscal Year', and select 'is between'**: Points to the 'Fiscal Year' dropdown menu in the filter panel.
- Type fiscal year range e.g., '2019' and '2022'**: Points to the input fields where the years 2019 and 2022 are entered.
- Data is automatically populated as shown**: Points to the resulting filtered data table.

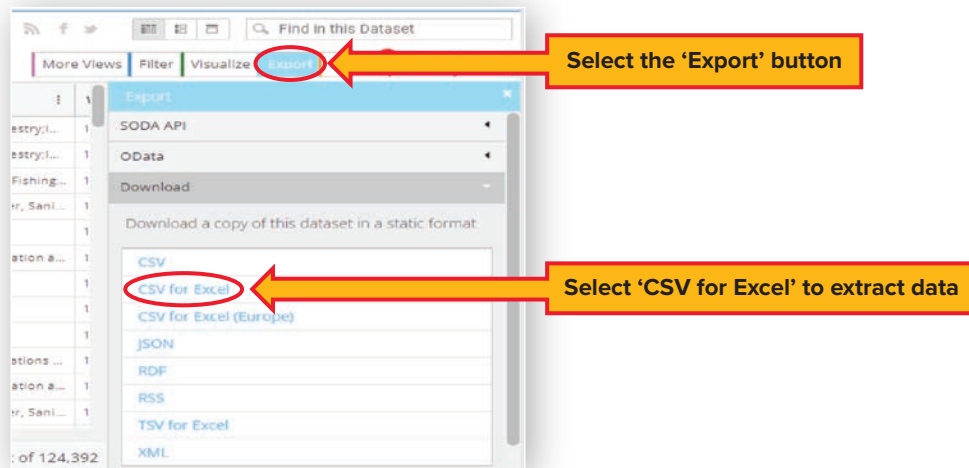
Data Table:

The data table displays contract awards in investment project financing. The columns include: As of D., Fiscal Year, Region, Borrower Country, Borrower Cou., Project ID, Project Name, Procurement Cat., Procurement Method, and Major Sector. The table shows 10 rows of data, all filtered for the fiscal year 2019.

As of D.	Fiscal Year	Region	Borrower Country	Borrower Cou.	Project ID	Project Name	Procurement Cat.	Procurement Method	Major Sector
Sep 20, 2022	2019	EAST ASIA AND PA...	China	CN	P132541	Shaanxi Poor Rural Areas Communit...	Civil Works	Request for Bids	Agriculture, Fishing and Forestry...
Sep 20, 2022	2019	EAST ASIA AND PA...	China	CN	P132541	Shaanxi Poor Rural Areas Communit...	Civil Works	Request for Bids	Agriculture, Fishing and Forestry...
Sep 20, 2022	2019	EAST ASIA AND PA...	Philippines	PH	P132217	Philippine Rural Development Project	Consultant Services	Individual Consultant Selection	Transportation/Agriculture, Fishing...
Sep 20, 2022	2019	Western and Cent...	Central African Repub...	CF	P162248	Water and Electricity Upgrading Proj...	Consultant Services	Individual Consultant Selection	Energy and Extractives/Water, Sanit...
Sep 20, 2022	2019	Eastern and South...	Kenya	KE	P131831	Kenya Youth Employment and Oppor...	Goods	Request for Quotations	Education/Social Protection
Sep 20, 2022	2019	EAST ASIA AND PA...	Laos People's Democr...	LA	P164808	Mekong Integrated Water Resources...	Consultant Services	Individual Consultant Selection	Transportation/Water, Sanitation a...
Sep 20, 2022	2019	Eastern and South...	Kenya	KE	P131831	Kenya Youth Employment and Oppor...	Goods	Request for Quotations	Education/Social Protection
Sep 20, 2022	2019	Eastern and South...	Kenya	KE	P131831	Kenya Youth Employment and Oppor...	Goods	Request for Quotations	Education/Social Protection
Sep 20, 2022	2019	Eastern and South...	Kenya	KE	P131831	Kenya Youth Employment and Oppor...	Goods	Request for Quotations	Education/Social Protection
Sep 20, 2022	2019	Western and Cent...	Cote d'Ivoire	CI	P136900	Transport Sector Modernization and...	Consultant Services	Direct Selection	Information and Communications...
Sep 20, 2022	2019	EAST ASIA AND PA...	Laos People's Democr...	LA	P164808	Mekong Integrated Water Resources...	Consultant Services	Individual Consultant Selection	Transportation/Water, Sanitation a...

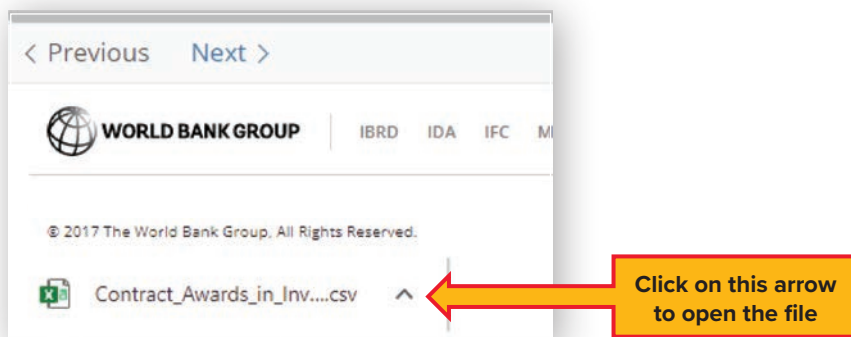
Extracting Data on an Excel Spreadsheet

FIGURE 13 Data extraction process



Once 'CSV for Excel' is selected, a pop-up window will appear at the bottom of the screen as shown in figure 14. Once opened, save the file as '*.xlsx' for windows system to ensure that any changes you make will be saved accordingly.

FIGURE 14 Saving extracted data as an excel file



Connecting the Dataset to MS Power BI

Connecting the dataset to Power BI enables users to always have the most up-to-date information simply by refreshing Power BI. This eliminates the need to apply filters each time information is downloaded.

FIGURE 15A Connecting to power BI: Step 1

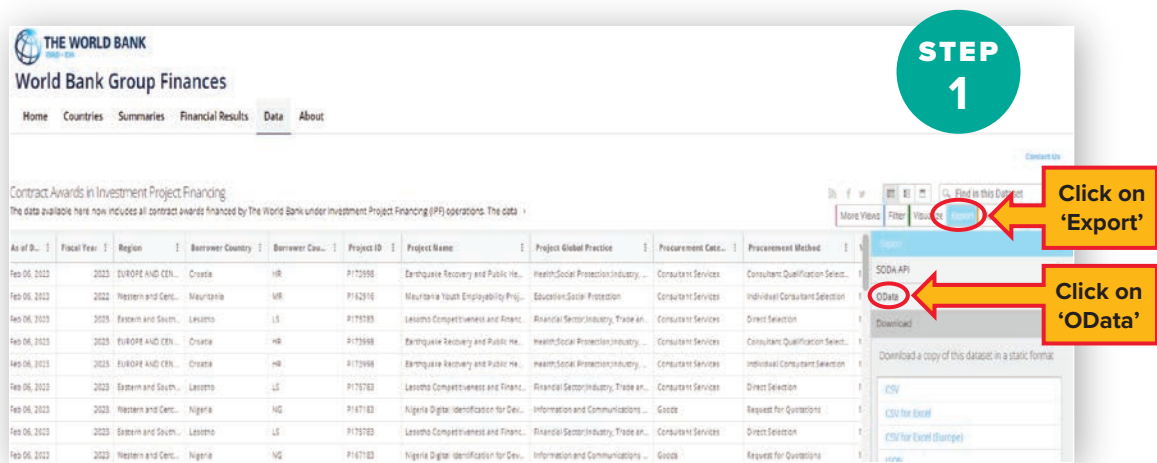
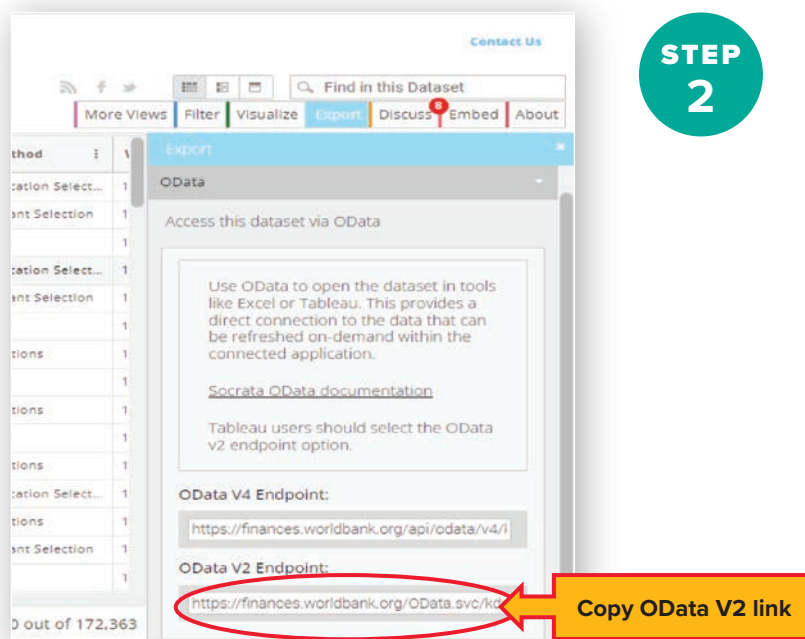


FIGURE 15B Connecting to power BI: Step 2



Open Power BI.

FIGURE 15C Connecting to power BI: Step 3

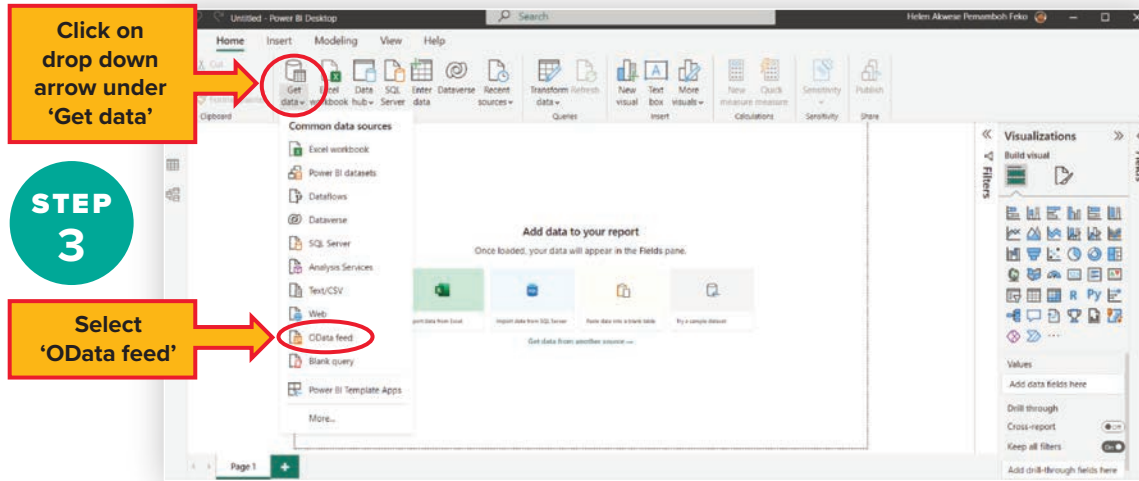
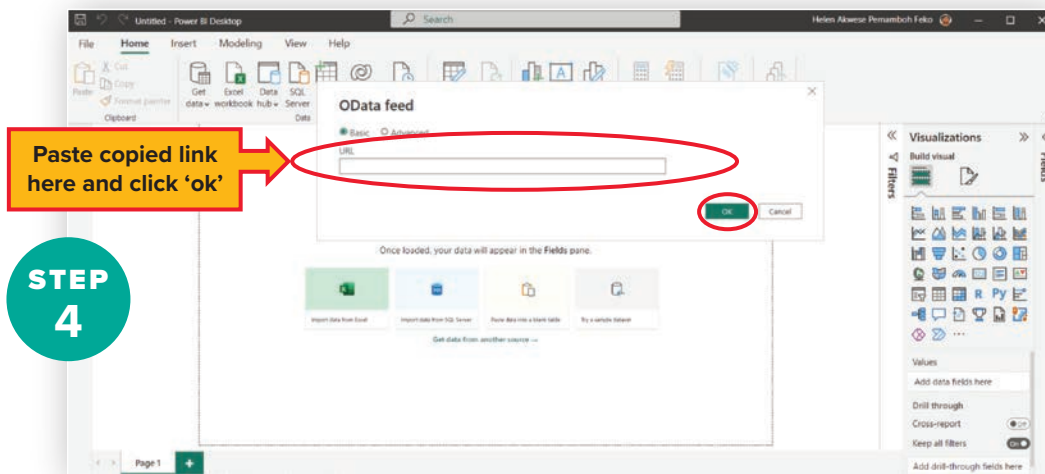


FIGURE 15D Connecting to power BI: Step 4



Frequently Asked Questions and Contacts

Frequently Asked Questions

Is the Finances One platform available for Android and iOS devices?

Yes. It is available on iPhone, iPad, Android devices, computers, and laptops.

Which languages are available for use with this platform?

At this time, Finances One is only available in English.

Can I download or export the data found on this platform?

Yes. Please see the section entitled 'Extracting Data on an Excel Spreadsheet'.

Where can I find more information about a project that is associated with a tender notice and/or contract?

There are two ways to access this additional information.

1. Download and install the Project Procurement application through this link: <https://itunes.apple.com/us/app/world-bank-project-procurement/id911312962?mt=8>
2. Through a web browser, the user can access the website <http://projects.worldbank.org/> and enter the corresponding Project ID into the search field to display further information.

Are there any limitations to the available data?

A potential limitation involves Supplier country-of-origin. The World Bank determines the country of origin of a supplier (company or individual) based on the country in which the supplier is registered as a legal business entity. If a contract is awarded to a subsidiary registered in a country (Country A) and the parent company is registered in a different country (Country B), then the data reflects the country of origin as that registered by the subsidiary (Country A).

Why are certain suppliers labeled as 'individual'?

The term 'individual' is used when a consultant contract is awarded to an individual, self-employed person. The term is used instead of the name of an awarded supplier. This practice is in place to protect personal privacy.

Does the data include both Prior and Post Reviewed contract information?

Yes. Post reviewed contracts were added as from FY17.

How do I register to bid?

There is no requirement to register before submitting a bid or proposal.

What is a procurement notice?

Borrowers inform bidders of upcoming procurement/contract opportunities by publishing the procurement notice, which may be in the form of an invitation for bids or a request for expression of interest (REOI).

Borrowers also publish notices of contract awards to inform participants in a procurement process as well as the public which bidder was successful and was selected for the award of contract.

If I can't find what I need, who do I contact?

Call: +1-202-473-1000 or reach out to any of these procurement staff members:

Contacts: Finances One and All Procurement Data

**Helen Pemamboh Feko**

Operations Analyst

Data Management & Analytics, Data Reporting Systems

hpemamboh@worldbank.org

**Marianella Rivadeneira Samaniego**

Program Assistant

Data Analytics & Reporting

mrivadeneira@worldbank.org

Contacts: General Procurement Queries



Enzo De Laurentiis

Chief Procurement Officer—Leads and manages the procurement specialists in OPCS. Sets and manages the Bank’s Procurement Framework, accredits Procurement Specialists to operate, and chairs the Operations Procurement Review Committee.

Elautentiis@worldbank.org



Christopher Mark Browne

Lead Procurement Specialist—Industry engagement, business outreach, and technical guidance.

cbrowne1@worldbank.org



Tesfaalem Gebreiyesus

Lead Procurement Specialist—Standard procurement documents & regulations.

titiesus@worldbank.org



Alexandre Borges

Lead Procurement Specialist

aoliveira@worldbank.org



Elmas Arisoy

Practice Manager—Eastern and Southern Africa

earisoy@worldbank.org



Diomedes Berroa

Practice Manager—East Asia and Pacific (Indonesia, Philippines and the Pacific)

dberroa@worldbank.org

**Kofi Awanyo**

Practice Manager—West Africa (Francophone and Lusophone Africa)
Kawanyo@worldbank.org

**Hiba M. F. Tahboub**

Practice Manager—East Asia and Pacific (South East, Asia and China)
Htahboub@worldbank.org

**Jean-Jacques Verdeaux**

Practice Manager—Latin America and Caribbean
jverdeaux@worldbank.org

**Anna L Wielogorska**

Practice Manager—South Asia
awielogorska@worldbank.org

For additional information about the World Bank Procurement Framework, including Standard Procurement Documents (SPDs), Guidance, briefing, training and e-learning materials, please visit www.worldbank.org/procurement.



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