Effective Competitive Bidding in the IFI Market

Hussein M. Amery
Integrated Development Entreprise Associates (IDEA)

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Montreal, Quebec
International Development

Development is a complex, long-term process that involves all of the world's people, governments and organizations at all levels in the private and public sectors.
International Development

- The U.N. Millennium Development Goals guide all development organizations now.

The United Nations Millennium Declaration* sets the global agenda for the start of the 21st century. Adopted at the Millennium Summit (New York, September 6-8, 2000), by 147 heads of state, and 191 nations in all, the Millennium Declaration defines values, thematic issues and goals, some specific and time-bound, to guide the daily activities of the UN and its programs, so that globalization becomes a positive force for all the world’s people.
International Business
Development Focus

Pursuit of International Development Business is underpinned by policies and strategies of countries, donor governments and International Financial Institutions:

- Poverty Reduction Strategy Papers
- National Planning Frameworks
- Development Organization Country Program Frameworks (by government agencies such as CIDA, DFID, USAID, etc.)

You must be familiar with these respective strategies to work effectively in countries and respond to opportunities
Getting Started in International Business Development
International Business Development Units

To do effective development, an organization must have focus and leadership

**Action**
Establish a Business Development Unit with a mandate
Unit Development

Build and Staff a Business Development Unit with leaders and doers

- Leaders
  - 1. Appoint Manager or Director of Business Development or Project Officer

- 2. Identify Regional, Sub-Regional, Country specialists

3. Appoint Personnel for specialized Proposal services

  - 1. Writer(s)
  - 2. Researcher(s)
  - 3. Contract Negotiation
  - 4. Project Implementation
The Project Proposal Team

**Development Manager**
- Partnership / Consortium
- Agreement Signature
- Job Assignments
- Selection / Approval of Consultant selection
- Overall Decision making
- Approve Financial & Technical Proposal
- Sign every page of document

**Bid Coordinator**
- Overall Methodology preparation
- Structure and Layout of Technical Proposal
- Selection and identification of charts and content of specific sections
- Input on consultant selection

**Bid Writer**
- "The Pen"

**Technical Writers**

**Researchers**
- (head office & field, including local firm)
- Collection of key sector and country data and information
- Identification of key contacts and decision makers
- Preparation of charts for project
- Technical content and input for writers

**HR/ CV Recruitment Specialist**
- (Head off. & Local)
- Identification and recruitment of key personnel
- Ensure appropriateness of CV, length / content

**CV input**
- (Administrative Staff)

**Administrative Support**
- General Support for Technical and Financial Proposal

**Financial Specialist**
- Financial Proposal Format
- Formula for the proposal
- Confirm all Costs
- Competitor intelligence

**Accountant**
- Ensure corporate and financial accuracy integrity

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Effective Competitive Bidding in the IFI Market
Commitment Considerations

- IFI procurement requires a commitment to the region/country
- Early identification of opportunities allows for better marketing
  - Review Country Assistance Strategy (CAS)
  - Identify opportunities at the approval stage of the project cycle
Commitment Considerations

- Market intelligence is very important
  - Establish a Local presence
    - Site Visit, Local/ International Partner, Contracted Agents, or Network of institutions
  - Work with Canadian Trade Commissioners
  - Contact IFI Liaison Offices
Cross Cultural Issues

- Be Aware of the culture and environment of which you are proposing to work in

- If you are not prepared to adapt and adjust, you will have great difficulty achieving success
Understanding the Bidding System and Identifying Opportunities
## International Financial Institutions

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<th>Canadian Participation</th>
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<td>Charles Basset</td>
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<td><strong>World Bank (WB)</strong></td>
<td>Washington</td>
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<td>218</td>
<td>17</td>
<td>Marcel Massé</td>
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<tr>
<td><strong>African Development Bank (AfDB)</strong></td>
<td>Tunis</td>
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<td>9</td>
<td>François Arsenault</td>
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<tr>
<td><strong>Caribbean Development Bank (IDB)</strong></td>
<td>Barbados</td>
<td>25</td>
<td>17</td>
<td>1</td>
<td>1</td>
<td>Joanne Goulet</td>
</tr>
<tr>
<td><strong>European Bank for Reconstruction and Development (EBRD)</strong></td>
<td>London</td>
<td>60</td>
<td>27</td>
<td>1</td>
<td>1</td>
<td>Scott Clark</td>
</tr>
</tbody>
</table>

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*Effective Competitive Bidding in the IFI Market*
IFI Market

- $40 billion annually
- $16.6 Billion – 39% of overall spending on infrastructure
- WB set to increase annual infrastructure spending in 2005 from $5.4 billion to $7 billion
- Relatively small compared to the total $250 billion spent annually in Less Developed Countries (LDCs) on infrastructure
IFI Market and the Environment

- The World Bank approved 67 new projects with environmental content in fiscal 2004, for a total of $1.3 billion.
  - The environment strategy of the Bank focuses on climate change, forests, water resources, pollution management, and biodiversity, among others.
  - The World Bank Institute's Environment and Natural Resources Management (ENRM) program specifically strengthens the capacity of people and institutions that influence environmental and natural resources management.
IFI Market and the Environment

The Inter-American Development Bank approved new loans worth $114 million to protect natural resources, and technical cooperation worth $6.1 million in 2003,

- Protecting the natural resources that support social and economic development has been a constant element of IDB's environmental agenda, with an emphasis on forestry and fisheries, industry, tourism and environmental sustainability.

The Asian Development Bank approved loans totaling $305 million to address environmental sustainability in 2003.

- Assistance focused on providing the poor access to basic water and sanitation services, on managing the natural resources on which the poor depend, and on improving the quality of the environment.
World Bank (WB) Group, 1945

International Bank and Reconstruction and Development (IBRD) and International Development Association (IDA), set up in 1960

- to lend funds, provide economic advice and technical assistance, and encourage investment by others

International Finance Corporation (IFC), created in 1956

- to promote growth in developing countries through support to the private sector

Multilateral Investment Guarantee Agency (MIGA), 1988

- to provide investors in developing countries with guarantees against loss caused by non-commercial risks, and to give policy advice to developing member countries on improving their foreign investment and environment
World Bank (WB) Group
Lending Volume: US$19.5 billion (FY 2001-02)

Sectoral Priorities (%)  

- Human Dev., 13.3
- Urban Dev., Resource Mgt., 2.8
- Soc. Protection, 8.7
- Rural Dev., 12.9

Regional Priorities

- Latin Amer & Caribbean, 24.3%
- Europe & Central Asia, 20.7%
- E. Asia & Pacific, 24.4%
- S. Asia, 13.5%
- Africa, 14%
- Middle East & N. Africa, 4.7%

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Canada International Trade
Commerce International Canada
Inter-American Development Bank

- **Loans** - Ordinary Capital Resources (OCR); Fund for Special Operations; and Intermediate Financing Facility

- **Inter-American Investment Corporation (IIC),** established in 1989 - promotes small and medium-scale private enterprise development, and supports public entities whose activities strengthen private sector

- **Multilateral Investment Fund (MIF),** set-up in 1992 - designed to support modernization process, and ease human and social costs of economic adjustment by providing grants for work force training, small business development and improvements in investment climate
Inter-American Development Bank

- Lending Volume: US$ 4.5 billion (FY 2001-02)

- Region 1, $1,698,000,000
  - Industry, Mining & Tourism 13%
- Region 2, $1,983,000,000
- Region 3, $847,000,000
- Regional, $20,000,000

- Urban Dev. 7%
- Energy 3%
- Transport & Comm 11%
- Modernization of the State 17%
- Soc. Inv. 49%
- Other 17%
Caribbean Development Bank

Lending volume: US$115.1 million (2002 FY)

Sectoral Priorities
- Transport and Communications
- Agriculture, Forestry, and Fishing
- Financing
- Power, Energy, Water
- Social Services
African Development Bank (AfDB)

Lending Volume: US$2,027 billion (FY 2002)

- Sectoral Priorities
  - Agriculture and Rural Development
  - Social Sector
  - Finance
  - Power
  - Multisector
Asian Development Bank (ADB)

Lending Volume: US$5,854 million (2001-02 FY)

Sectoral Priorities
- Transport & Communications
- Finance
- Social Infrastructure
- Energy
- Agriculture & Nat. Resources
- Multisector
Identifying IFI Opportunities

- Identify opportunities through Development Business
- Opportunities published on the Web site of in-country news papers and public documents
- Identify status of project in project cycle
- Review Ongoing projects and programs for potential sub-contract work
Identifying IFI Opportunities

- Identify project opportunities through partners/country/sector contacts; Develop local partnerships
- Site Visits to field and relevant Ministries and Project Implementation Units
- Write down all ideas!
Roadmap to International Development Business

Presents a comprehensive, practical business guide on pursuing international development business service opportunities through projects funded by United Nations agencies and the major International Financial Institutions

Roadmap to International Development Business

Service industries

Roadmap to International Development Business

Pursuing Contracts Funded by International Financial Institutions and the United Nations System

Industry Sector Opportunity Focus:

- Management Consulting
- Legal and Judicial Reform


The resources on this site are aimed in particular at companies interested in pursuing contract opportunities in management consulting and in a growing number of legal and judicial reform projects in developing and transition countries.

Legal and Judicial Reform. Legal drafting, legislative and regulatory reform; modernization of legal institutions and court administration; training of judges, legal information systems and many other aspects of law and development represent robust contract opportunities for Canadian law firms, NGOs, universities, legal institutions and individual experts.

Management Consulting. Services in a broad range of functional areas (i.e., Human Resources, Strategic Planning, Finance and Banking, Tax reform, Information Technology) are in high demand for the planning and execution of comprehensive economic and social development projects financed by the IFIs and UN System.
International Project Development Roadmap

- a step-by-step approach or "roadmap" to ensure the rational and well-orchestrated development of international infrastructure and other capital projects.
• works towards increasing Canada's exports by matching Canadian companies with non-Canadian company requests for:
  - **Products**
  - **Services**
  - **Partners**

Development Business
www.devbusiness.com

DB Online: US $495 / year
DB Print Only: US $550 / year
DB Print & Online: US $725 / year
DB MOS Only: US $275 / year

Development Gateway Market
Dgmarket.com
Development Business
- Online Version -

- Electronic version of Development Business now is the rule.

- EOI submissions and goods/equipment bids are often due 30 days from the online publication date, not from the issue date.

- You should log in and check for new procurement notices every few days.
IFI Net

- [www.infoexport.gc.ca/ifinet](http://www.infoexport.gc.ca/ifinet)
- IFI Business Guides
- Success stories/case studies
- Summary of key info sources
- Free subscription to weekly IFI newsletter
DACON

DACON - Data on Consultants

- Computerized registry of consulting firms
- Harmonized: Can send same forms (AsDB WB, IDB)

- **Not** mandatory for World Bank & IADB
Four Main Types of Procurement

- Procurement of Goods & Equipment
- Procurement of Services (Consulting / TA)
- Procurement of Civil Works
- Procurement of Information Technology
Information Technology Procurement

- IT a rapidly growing area of procurement
- Standard Bidding Documents for IT Procurement
- Complexity of IT demands emphasis on ‘non-price’ factors in evaluating proposals
- E-Government Procurement (see OLIFI website)
Information Technology Procurement

- World Bank IT Procurement Forum
- Comprehensive info; register there to get on *Listserve*
Resource Documents Released During Project Preparation

- Identification
- Preparation
- Appraisal
- Negotiations/Approval

- Monthly Operational Summary (MOS) Entry
- Project Information Document (PID)
- Staff Appraisal Report (SAR)
- Technical Data Sheet (TDS)

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# Project Cycle

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<th>Who?</th>
<th>How to Find out More? (what information is publicly available)</th>
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<tr>
<td>Preparation</td>
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<td>WB/IADB and Borrower</td>
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<tr>
<td>Appraisal</td>
<td>Short-term, individual</td>
<td>WB/IADB</td>
<td>PAD/SAR, Project Proposals</td>
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<tr>
<td>Negotiation</td>
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<td>WB/IADB and Borrower</td>
<td>GPN</td>
</tr>
<tr>
<td>Implementation and Supervision</td>
<td>Competitive (&gt;US$ 200K) and short-term individual</td>
<td>Borrower</td>
<td>SPN/RFP, MCAN</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Short-term, individual</td>
<td>WB/IADB</td>
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### Types of IFI Submissions/Responses

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<td>Specific Procurement Notice (SPN)</td>
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<tr>
<td>Requests for Proposals (short-list)</td>
<td>Detailed Technical &amp; Financial Proposal</td>
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</table>
ANDHRA PRADESH HAZARD MITIGATION AND EMERGENCY CYCLONE RECOVERY PROJECT

SATELLITE TELEMETRY EQUIPMENT AND RIVER AND RAINFALL GAUGING EQUIPMENT

Country: India
Sector: Telecommunications
Issue Date: 30 November 2001
Loan/Credit Number: Credit No. 2950-IN and Loan No. 4156-IN
Contract/Bid Number: IFB No. APHM and ECRP/P1g-DMU/03/2001
Deadline: 28 December 2001

This notice appears in UN Development Business Online only and not in the printed version. Although this notice is assigned to a specific print issue, the official publication date of this notice is considered the date that it is posted online (see below).

The Government of India, has received a credit (Credit No. 2950-IN) from the International Development Association (IDA) and a loan (Loan No. 4156-IN) from the International Bank for Reconstruction and Development (IBRD) in various currencies toward the cost of the Andhra Pradesh (AP) Hazard Mitigation and Emergency Cyclone Recovery Project (APHM & ECRP). It is intended that part of the credit and loan proceeds will be applied to eligible payments under the contracts for the supply, installation and commissioning of satellite telemetry equipment in Hyderabad, river and rainfall gauging equipment across Andhra Pradesh, India.

The Secretary, Planning Department, Government of AP, AP Secretariat, Hyderabad, on behalf of the
General Letter of Interest

- Brief one-page letter (a mini EOI)
- Introduce firm and ‘generally’ express keen interest in project
- Ask to be put on so-called “mailing list”
- Enclose minimal material
- Don’t rely on so-called “mailing list”; Track Dev Biz for Specific Procurement Notices.
Expression of Interest

- Cover letter (ideally one page)
  - Convey interest and awareness of project/issues
  - State why you should be short listed
  - Intent to incorporate local experts (Identify them)
  - Ask to be short listed!
Expression of Interest

- Accompanying 3-6 page pre-qual statement
  - Description of Firm/Corporate Profile
  - Project Experience (Relevant Ones; Brief Snapshots)
  - Language capabilities (Should EOI be translated?) brochures (Keep to a minimum)
Goods & Equipment

Procurement Notices
EMERGENCY RECOVERY & DISASTER MANAGEMENT PROJECT

GENERATORS - BID INVITATION

Country: Saint Kitts and Nevis
Issue Date: 16 September 2000
Deadline: 29 September 2000

This notice appears in UN Development Business Online only and not in the printed version. Although this notice is assigned to a specific issue, the official publication date of this notice is considered that date that it is posted online (see below).

The Government of St. Kitts and Nevis has received a loan from the International Bank for Reconstruction and Development (IBRD) toward the cost of the Emergency Recovery and Disaster Management Project, and it intends to apply part of the proceeds of this loan to payments under the contract for the supply and delivery of 27 generators. The Ministry of Finance, Planning and Development now invites sealed bids from eligible bidders for the supply and delivery of 27 generators.

Bidding will be conducted through the international competitive bidding procedures specified in the World Bank’s Guidelines: Procurement under IBRD Loans and IDA Credits, January 1995 (revised January and August 1996, September 1997, and January 1999), and is open to all bidders from eligible source countries as defined in the guidelines.

... cont. next page
BID INVITATION… (cont.)

Interested eligible bidders may obtain further information from and inspect the bidding documents at the Project Coordination Unit of the Ministry of Finance, Planning and Development at the address below from 0800 to 1600 hours. A complete set of bidding documents in English may be purchased by interested bidders on the submission of a written application to the address below and upon payment of a nonrefundable fee of US$ 100. The method of payment will be by international money order or cashier’s check made out to the Emergency Recovery and Disaster Management Project. The document will be sent by airmail for overseas delivery and surface mail or courier for local delivery.

Bids must be delivered to the address below by 1400 hours on 29 September 2000. All bids must be accompanied by a bid security of not less than 2 per cent of the bid amount in US dollars, or an equivalent amount in a freely convertible currency. Late bids will be rejected. Bids will be opened in the presence of bidders’ representatives who choose to attend at the address below at 1400 hours on 29 September 2000.

Contact

Project Coordinator, Project Coordination Unit, Ministry of Finance, Planning and Development, PO Box 186, Church St., Basseterre, St. Kitts and Nevis. Tel: (1-869) 465-2521, Ext. 1066, 466-2420. Fax: (1-869) 466-7398

Notice Identification Number: WB1309-542/00. Posted on 01 September 2000
Other Sources of Procurement Notices

• Borrowers required to also publish notices in local paper of wide circulation

• IDB Online.. IDB Requests for Expressions of Interest occasionally show up on their site but not in Development Business.
IDB Projects Online

- IDB Projects Online helps individuals and firms looking to participate in Bank projects by providing the information they need, when they need it.

- Subscribing to IDB Projects Online is easy! Simply visit: http://condc05.iadb.org/idbppt.asp/mainpage.asp
PROJECTS: PIPELINE - APPROVED | PROCUREMENT NOTICES | CONTRACTS: CONSULTING - GOODS AND SERVICES

IDB Projects Online

SEARCH | CONTENTS | MY ACCOUNT | HOME

Contents

- Project Pipeline
- Approved Projects
- Procurement Notices
- Contract Awards to Consultants
- Contract Awards for Good and Services
Solid Waste Management Program

Selection and Design of Regional Landfills and Transfer Stations

Loan No. 1185/0C-JA

The Government of Jamaica, through the Ministry of Local Government and Community Development, is implementing a National Solid Waste Management Program with financial assistance from a loan provided by the Inter-American Development Bank (IDB).

The Project Executing Unit (PEU), under the auspices of the Ministry, now invites expressions of interest from firms, joint ventures or consortia from the IDB’s member countries to provide consulting services for the selection and design of regional landfills and transfer stations.

The consulting company will be required to prepare documentation with clear and justifiable recommendations for the siting of four regional sanitary landfills and the identification of the location of the requisite transfer stations to link these regional landfills in Jamaica. The tentative budget for this activity is $270,000.

Each landfill must be designed for a minimum period of 20 years to serve populations of between 500,000 or 800,000 and to accept in excess of 2.5 million tons of waste per site when completed. Transfer stations shall be located as to facilitate access by small-load depositors.
Prequalification Submissions

- **Purpose**: Identify a maximum of 6 qualified suppliers to present detailed proposal

- **Experience of the FIRM**
  - description
  - sample relevant project

- **Key Personnel**
  - in house expertise

- **Product**
  - alliances and associates
  - understanding of project

- **Management Capacity**
  - management techniques
  - track record

- **Financial Certifications**
  - Declaration of solvency
  - bank interest to issue irrevocable letter of credit (for advances over $50k)
  - proof of liability insurance (if applicable)
Pre-qualification Criteria
(Making the Short List)

- Legal Capacity (eligibility) .......(Yes/No)
- Financial Capacity............... (Yes/No)
- General Technical Background and Capability.......................... (40%)
- Experience in Similar Work....... (35%)
- Experience in the Country,
  or Similar Countries............(10%)
- Language Capability.............. (10%)
- Use of Local Consultants / Inputs (5%)
Request For Proposal (RFP)

Contents

The Letter of Invitation

• Other short-listed firms
• QCBS (Quality Cost-Based Selection) or QBS

■ Data Sheet
  • Estimated person-months / Specifications and Content

■ Evaluation criteria

■ Prescribed Proposal Format (Standard Forms)

■ Terms of Reference

■ Draft Contract and Specifications
QCBS
Getting Points for Partnering

- Financial Evaluation accounts for as much as 25% of the overall proposal evaluation (in World Bank TA projects)

- greater price competition in IFI bids

- Local content typically economizes on budget for fees.
Key Proposal Evaluation Criteria

Actual criteria vary depending on nature of work, country, etc.

Approx. +/-

Qualifications/experience of team members (CVs) ..... 40 pts
Approach and Methodology .................................... 40 pts
Language Proficiency .............................................. 10 pts
Local Content (use of local consultants) ......................... 10 pts

100 pts
Other Evaluation Criteria

- Demonstrating understanding of difficulties of assignment: 10-15 pts.
- Local Participation
  - (Ranges from 10-20 points out of 100)
  - For this, and other reasons, having domestic partners is essential to winning the contract
- Financial Capability
First Step: Deciding to Bid

- Once you have reviewed the invitation, you must state your intention to bid in the form of a letter.
- The first step is to decide whether or not you want to bid.
Internal Considerations:

- Do we have the capacity for this project?
- What is our return on investment? Is it profitable?
- Do we face a backlog already?
- Can we deliver?
- Can we meet the deadline?
- Do we have the required staff available?
- Is the geographic location in our area of expertise?
- Do we have the necessary financial resources?
- Are we ready for this initiative?
Internal Considerations:

- mission statement endorsing international projects
- Statement of strategic orientation of international program/activities
- Senior Management support
- Capacity within organization’s personnel
- External/community support
- Internal institutional support systems
- International experience (Institutional and individual)
- Partnership / collaboration experience
- Relevant language(s)
- Investment funds, financial and other resources
External Considerations:

Does the funder know our organization?

- Can we find a sound partner and establish a strong winning team?
- How many competitors are there?
- Who is the competition?
Review diagram of groundwork required for Proposal

LOI → Site Visit → Short List → Request for Proposal

Funder Programming Priorities → Country Client Goal and Objectives → Ongoing Projects or Partnerships → Org’s Strategic Orientations → Eligibility of Organization → Selection Criteria

Conduct institutional capability analysis
Determine specialization in field(s) of proposed activity
Review list of potential partners - local and foreign
Contact potential partners to develop and finalize cooperation
Conduct site visit to gather information for proposal

Formulate and write proposal
Conducting a Site Visit

• **Is a site visit necessary?**
  - may be essential, to be successful and understand situation and real chances of success
  - generally not necessary for pre-qualification

• **Why is it necessary?**
  - for establishing realistic, meaningful and appropriate proposal
  - to establish mutual understanding, awareness of client interest and for client to understand you
Conducting a Site Visit (Ideal)

What do you do on a site visit?
- confirm players and partnerships
- verify fit / match
- develop skeleton of your project, including methodology

What do you need to bring back to Canada?
- key proposal elements / concept
- country scenario
- local costs
Preparing the Technical Proposal
Preparing the Proposal: Overview of the Process

1. Assign Responsibility
2. Conduct a site visit
3. Develop and flesh out project methodology/approach
4. Prepare draft technical proposal, including initial draft financial proposal
5. Secure letters of support/agreement
6. Confirm final proposal
7. Finalize detailed financial proposal
8. Review final proposal for eligibility/selection criteria and Submit to Funder
Responsibility Matrix

- Complex problems and proposals require teams
- Teams need to be organized to achieve success
- For proposals, rapidity is essential
- Assign tasks
  - Production, graphics, packaging, cover, logistics
  - CVs (start early)
  - Drafter(s) ... proposal should have one voice
Technical Proposal (World Bank) Standard Format and “Forms”

- Submission letter
- The Cover
- Section A – Introduction
- Section B – The Firm’s References
- Section C – Project Appreciation
- Section D – Methodology and Work Plan
Technical Proposal (World Bank) Standard Format and “Forms”

- Section E – Comments and Suggestions on TOR
- Section F – Activity (Work Schedule) and Deliverables/ Team Members Deployments
- Section G – Composition of Team and Curricula Vitae of Team Members
Key Points: Proposal Design

- Ensure Consistency with all priorities of donours and country
- Proposal should enhance the capacity of client to effect change
- Proposal should be realistic and competitive - within the expected budget
- Realistic and resources should be available - within the available timeframe
- Partners with specific and complementary project roles, Clarify expectations ($$)
- Includes inputs only from Bank Member countries
The Cover

- Nice packaging conveys professionalism, creativity, innovativeness
- Use quality paper, binding, lots of colour,
- Creative graphics reflecting the country or sector
Map: Focus of Work
Section B: Firm’s References

- One-two page project quals / profiles (formal requirement)
- Narrative section describing firm and introducing team via 2-3 sentence bios. (sell, sell, sell)
- This section is where you sell your qualifications. With particular focus on individual team members and results of assignment.
# Demonstrate Firm’s Experience: The Project Profile

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<tr>
<th>Key Project Data</th>
<th>Project Description</th>
<th>Personnel</th>
</tr>
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<tbody>
<tr>
<td>- Project Name</td>
<td>- Description of Project</td>
<td>- Number of Staff</td>
</tr>
<tr>
<td>- Country</td>
<td>- Description of Services Provided</td>
<td>- Number of Person Months</td>
</tr>
<tr>
<td>- Project Location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Within Country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Name of Client/Funder/Partner</td>
<td></td>
<td>- Name of Key Staff And Functions Performed</td>
</tr>
<tr>
<td>- Start Date/Completion Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Reference Number</td>
<td></td>
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</tr>
</tbody>
</table>

- Financial Data
  - Value of Services
  - Fees/Services
  - Reimbursables
  - Procurement
  - In-kind
Demonstrate Experience

- Provide a summary chart listing profiles and relevancy to project.
<table>
<thead>
<tr>
<th>Country, Name of Project</th>
<th>DACUM Process</th>
<th>Curriculum Development (Content) &amp; Instructional Design</th>
<th>Other Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Pakistan, Technical Education</td>
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<tr>
<td>2 India, Canada-India Institutional Coop I &amp; II</td>
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<td>3 India, Canada-India Industry Linkage</td>
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<tr>
<td>4 China, Canada-China Linkage Program</td>
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<tr>
<td>5 Jordan, Economic Development Through Technical Skills</td>
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<tr>
<td>6 Romania, Establishment of Regional Adult Training Centres</td>
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<tr>
<td>7 Indonesia, Technical and Vocational Education and Training</td>
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<td>8 Indonesia, Second Agricultural Technology Schools</td>
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<td>9 Uzbekistan, Employment Services</td>
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<td>10 Hungary, Human Resources, Youth Training Component</td>
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<td>11 Hungary, Tech/Vocational Training System Reform</td>
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<tr>
<td>12 Vietnam, Thailand, Indonesia, SEAMEO Marketing</td>
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<tr>
<td>13 Vietnam, Modularized Curriculum Development</td>
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<td>14 Vietnam, Hatay Food Processing Programs</td>
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<td>15 Vietnam, Open College Curriculum</td>
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<tr>
<td>16 Vietnam, Business Management in Aquatic Resources</td>
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<td>17 Vietnam, Agricultural Education Centre</td>
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<tr>
<td>18 Vietnam, Mechanics &amp; Business Skills</td>
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<tr>
<td>19 Vietnam, Fisheries Technology HRD Project</td>
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<tr>
<td>20 Malaysia, Electronics Instrumentation Programme Strengthening</td>
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</tbody>
</table>
Section C: Project Appreciation

- Is supported by statistical evidence, where appropriate
- Is supported by statements from authorities and tied to goal and purpose
- Is stated in terms of clients, funders and ultimate beneficiaries
Project Appreciation

- Focuses on development problem of reasonable dimension
- Is based on the conclusions of a needs assessment
- Does not make assumptions
Identify Inter-relationship of Project Objectives

Funder Priorities

Country/Sector Goals, Objectives, and Plans

Selection Criteria, Proposal Invitation

Organizational Strategic Orientations
Section D: Approach, Methodology and Workplan

- The guts of the proposal
- Use graphical models to illustrate your strategy and approach
- Use lots of tables (logical framework style) to lay out your methodology and workplan.
- Divide project into Activities and Tasks (as with ‘Work Breakdown Structure’, WBS.
- Summary tables, frameworks, bullet points make it easier for them to read, understand, and evaluate.
Project Work Plan

- Flows naturally from the appreciation and goal / purpose/ expected results
- Clearly describes project results and corresponding activities
- States reasons for method of delivery of packages (in terms of results)
- Describes sequence, duration and timing of activities
- Presents a reasonable scope of activities achievable within the time and funds allotted
REGIONAL ADULT TRAINING CENTERS (RATC)

Objective: Initiate operations at up to 6 Regional Adult Training Centers, by restructuring selected existing institutions, or by setting up new centers in buildings available by local communities, governed by the Regional Employment and Training Agencies (which are supported by the Tripartite Advisory Council), to deliver comprehensive services meeting NTB norms.

RATC Activity No. 1
Administration
Develop administrative procedures.
RATC1.1 - Program Operations and Financing of RATCs
RATC1.2 - Public Relations
RATC1.3 - Human Resource Development
RATC1.4 - Design / Deliver Study Tour for 6 RATC Managers

RATC Activity No. 2
Vocational Programs (12)
Define vocational profiles in each of 6 RATCs, develop modular training curriculum define specifications for related equipment and materials and monitor procurement and installation of equipment and materials.
RATC2.1 - Develop Vocational Profiles
RATC2.2 - Develop Modular Training Curriculum
RATC2.3 - Define/Monitor Procurement of Training Equipment and Materials
RATC2.4 - Design / Deliver Fellowship program on:
  2.4.1 - Vocational Profiling
  2.4.2 - Modular Training Curriculum Development
  2.4.3 - Training Equipment and Materials Development

RATC Activity No. 3
Facility Development
Assist with the design and monitoring of facility conversion for 6 RATCs.
RATC3.1 - Redesign the RATCs
RATC3.2 - Monitor RATC Site Conversion

RATC Activity No. 4
Counseling and Placement
Assist with the implementation and counseling and placement programs at 6 RATC including defining and assisting with procurement of related materials and equipment.
RATC4.1 - Develop Counselling and Placement programs for the use of RATCs
RATC4.2 - Define/Monitor Procurement of Training Equipment and Materials
RATC4.3 - Design / Deliver Fellowship Program for RATC counsellors

RATC Activity No. 5
General Education
Develop up to four general education programs for use at 6 RATCs. These general education programs will support training programs.
RATC5.1 - Mathematics
RATC5.2 - General Technology
RATC5.3 - Occupational Foundation
RATC5.4 - Languages
RATC5.5 - Science / Physics
RATC5.6 - Design / Deliver Fellowship program for RATC general education curriculum developers

RATC Activity No. 6
Customized Training
Develop guidelines and the capability for customized quick-start enterprise specific training at RATCs.
RATC6.1 - Develop Guidelines for Establishing Quickstart Program
RATC6.2 - Deliver Customized Enterprise Training Program
RATC6.3 - Design / Deliver Fellowship Program for RATC Enterprise Trainers

RATC Activity No. 7
Small Enterprise Training
Develop entrepreneurship training programs for RATCs.
RATC7.1 - Develop SME Training Programs
RATC7.2 - Deliver SME Training Program
RATC7.3 - Design / Deliver Fellowship Program on SMEs

RATC Activity No. 8
Instructor Training
Develop and provide approximately one month of pedagogical training to all RATC instructors (approx. 180).
RATC8.1 - Develop Pedagogical Training for RATC Instructors / Design Instructional Materials
RATC8.2 - Deliver Pedagogical Training Program

Hussein M. Amery
Effective Competitive Bidding in the IFI Market
International Trade Canada
Commerce International Canada
Management Strategy and Implementation Strategy

- Clearly describes management strategy
- Describes staffing of project both in Canada, other locations, and field
- Describes roles and responsibilities of Canadian and field partners
- Describes implementation approach concerning critical conditions and risk assessment
Section E: Comments/ Suggestions on TOR

- Here’s where you demonstrate understanding of the assignment
- Make suggestions as to other objectives, results, deliverables
- Largely narrative section basically reiterating the TOR. But perhaps more clearly than they were written.
Section F: Activity (Work) Schedule

- Project time-table (Activity by activity)
- GANTT/Bar Chart showing timeline of project, activity by activity, dates of key deliverables
Activity Schedule

- Demonstrate Level of Effort of individual team members
- Bar Chart showing person days for each team member for each activity
- What they’re looking for here is to make sure you’re giving sufficient days to the key experienced people (and to the locals).
- You’ll have a chance to reallocate (to an extent) during negotiations, inception and implementation
<table>
<thead>
<tr>
<th>NAME</th>
<th>POSITION</th>
<th>TASK NAME</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
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</thead>
<tbody>
<tr>
<td>Angus King</td>
<td>Administration</td>
<td>Prog. Operations &amp; RATC</td>
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</tr>
<tr>
<td>George Tillman</td>
<td>P. R. Specialist</td>
<td>Financing Consultant of RATCs</td>
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<tr>
<td>Ethel Milkovits</td>
<td>HRD specialist</td>
<td>Human Resource Development</td>
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<td></td>
<td></td>
<td>Design/ Deliver Study Tour for 6 RATC Managers</td>
<td>4W</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>NAME</th>
<th>POSITION</th>
<th>TASK NAME</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
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</thead>
<tbody>
<tr>
<td>Mal Turaga</td>
<td>Mechanical Program Specialist</td>
<td>Develop Vocational Profiles</td>
<td>4W</td>
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<tr>
<td>John L. Dumensni</td>
<td>Construction Program Specialist</td>
<td>Develop Construction Profile</td>
<td>4W</td>
<td></td>
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<tr>
<td>Erwin Stammler</td>
<td>Manufacturing Program Specialist</td>
<td>Develop Manufacturing Profile</td>
<td>4W</td>
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<tr>
<td>Stephen Finnigan</td>
<td>Electrical Program Specialist</td>
<td>Develop Electrical Profile</td>
<td>4W</td>
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<tr>
<td>B. Wright</td>
<td>Hospitality &amp; Tourism Specialist</td>
<td>Develop Hospitality Profile</td>
<td>4W</td>
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<tr>
<td>Steven Russell</td>
<td>Agriculture Programs Specialist</td>
<td>Develop Agricultural Profile</td>
<td>4W</td>
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<tr>
<td>Elaine McNeil</td>
<td>Health Programs</td>
<td>Develop Health Profile</td>
<td>4W</td>
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<tr>
<td>Roland Roberts</td>
<td>Automotive Technology Specialist</td>
<td>Develop Automotive Profile</td>
<td>4W</td>
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<tr>
<td>G. Dymitrow</td>
<td>Agrifood Processing Specialist</td>
<td>Develop Agrifood Profile</td>
<td>4W</td>
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<tr>
<td>S. Kormilo</td>
<td>Electronics Programs Specialist</td>
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<td></td>
<td></td>
<td>Additional program profile</td>
<td>4W</td>
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</tbody>
</table>
Section G: Composition of Team

- Lists team members, their titles, and responsibilities in table

- Include a team/project Organization Chart (usually not requested, but its effective)
Proposed Consultant Team

Package 2

XXX in association with XXX Consultants

Team Leader/ Specialist Dr. J. Williams

International Consultants

Instructional Design Specialist

Mobile Training Specialist

Equipment Procurement Specialist

Multimedia Development Specialist Teaching and Learning Resources

Multimedia Development Specialist Textbook Publishing

Multimedia Development Specialist Courseware Development

Domestic Consultants

Skills Standards, Testing and Certification Specialist

Instructional Design Specialist

Equipment Procurement Specialist

Multimedia Development Specialist Textbook Publishing

Multimedia Development Specialist Courseware Development

School- Industry Partnership Specialist

Mobile Training Specialist

Equipment Procurement Specialist

School- Industry Partnership Specialist

Multimedia Development Specialist Textbook Publishing

Multimedia Development Specialist Courseware Development

Specialists

Horticulture

Handicrafts

Food Processing

Petrochemicals

Mechanical

Electricity & Electronics

Nursing & Health Care

Information Technology

Horticulture

Handicrafts

Food Processing

Petrochemicals

Mechanical

Electricity & Electronics

Nursing & Health Care

Information Technology Specialist

International Trade Canada Commerce International Canada
CVs of Team Members

- Provide a summary chart demonstrating team experience
- CV’s of Team Members
- Page limited. Usually 3 or 5 pages
- Separate CVs with color dividers
- Make sure they’re signed, even if by proxy
### Areas of Specialization

<table>
<thead>
<tr>
<th>Experience</th>
<th>Degree Obtained</th>
<th>IN-CANADA PROJECT</th>
<th>LONG TERM STAFF</th>
<th>SHORT TERM CONSULTANTS</th>
<th>(Specialists)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Training</td>
<td>Ph.D.</td>
<td>✔️</td>
<td>✔️</td>
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<td>M.A.</td>
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<td>M.Sc.</td>
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<td>B.Sc.</td>
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<tr>
<td>Relevant Professional Training</td>
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<td>Identification, Planning, Design &amp; Management of Programme &amp; Projects</td>
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<tr>
<td>Knowledge of Bangladesh Cultural, Social, and Economic Milieu</td>
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<td>Needs Assessment / Survey</td>
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<td>Agricultural Extension Services</td>
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<td>Industry Interface</td>
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<td>Policy Making / Advisory Services</td>
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<td>Research and Instruction</td>
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<td>Technology Transfer (Canadian and Overseas)</td>
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<td>Farm Management / Practical</td>
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<td>Workshops and Training Seminars</td>
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<td>Agriculture / Rural Credit</td>
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<td>Marketing</td>
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<td>Program / Fund Management</td>
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<td>Food Systems</td>
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<td>Equipment Procurement</td>
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</table>
Personnel and Curriculum Vitae

- Only identify personnel requested
- Identification of key personnel can be the key to a winning proposal (*up to 50% of the points!*)
- Balance between local and international consultants
- Key personnel have good mix of domestic and international experience
- In many cases, key personnel should have a strong academic background (*i.e.*, *Masters degree*)
CVs of Team Members

* Use Standardized Forms provided by the Banks (see Resource Package)
* It is important to submit a competent team of experts as well as relevant, well-prepared CVs.
* Since CVs are the main vehicle for presenting the proposed personnel, they must showcase expertise of the proposed individuals.
* It is important to emphasize the complementary skills of the personnel, as this demonstrates that the Consultant considered the interdependence of the tasks to be carried out by the various experts.
Assessing Proposed Personnel

- general qualifications - education and training, length of experience, type of position held, time with the firm, etc.
- adequacy of the project - suitability
- language and experience in the region - background in developing countries similar to the country in which the assignment is to be conducted and linguistic ability
Procurement

- Identify how your proposal meets specifications
- Identify country of origin
- Ensure source is part of member country
- Critical to build in role for local inputs
The Financial Proposal

- Separate Envelope. Will be opened in public and only after Technical Proposals are evaluated.

**LUMP SUM CONTRACTS (QCBS)**

- Costing proposal can be challenging (another important reason for a site visit). Often you have an idea of the budget or, at least, expected total person months.
- Pricing will depend much on analysis of the competition & knowledge of their rate standards.
- Be sure to research applicable taxes.
Producing and Submitting the Proposal

- Print, Sign, Signature
- Copy, mark original and copies
- Packaging
- Delivery
  - Fedex?
  - Fly someone over?
  - If its late, its doomed!
  - Get a receipt.
Writing Tips

- Present thoughts coherently and logically
- Use transitional words and phrases
- Use development terminology, avoid jargon
- Write simply, avoid long sentences
- Maintain your theme(s) throughout
- Support statements with facts
Writing Tips

- Avoid gratuitous statements ("We understand, We recognize, etc.")

- Demonstrate your commitment, capability, in what you write

- Make your responsiveness to the RFP apparent in your ideas and language
  (Compliance is critical)
Keys For Success in Bank Projects

- Identification of Projects Interest
  - Monthly Operational Summary (MOS)
  - Project Information Document (PID)
  - Staff Appraisal Report (SAR) if available

- Project Assessment
  - World Bank Staff
  - Executing Agency Officials
  - Local Partners

- Action
  - Expression of Interest
  - Local representation
  - Careful monitoring
Canadian Support Network

Support Network In Canada

- International Trade Canada www.infoexport.gc.ca/ifinet
- Development Business Support Unit - International Financing Division (TBF) Federal and Provincial Contacts
- Canadian (PSLO), Private Sector Liaison Officers Network: A network of local contacts, coast to coast, who facilitate for Canadian companies access to the opportunities supported by the World Bank Group (WBG).
- Provincial Export Support Agencies
- Canadian Manufacturers and Exporters (e.g., CABSAA program, etc)
Canadian Government Support Abroad

- Offices of Liaison with International Financial Institutions (OLIFI) [www.canadianembassy.org/olifi](http://www.canadianembassy.org/olifi)
- Canadian Executive Directors Offices within the Multilateral Development Banks (MDB)
- Canadian Trade Offices Abroad
- Canadian Trade Offices Abroad (UN Markets)
Canadian Trust Funds

- World Bank
  - Consultant Trust Fund (General)
  - TA Fund for Central/Eastern Europe
  - Global Environment Fund (GEF)
  - Persistent Organic Pollutants Fund
  - World Bank Institute Fund
  - IFC Trust Fund

- Inter-American Development Bank
  - Canadian Technical Cooperation Fund

- Caribbean Development Bank (CTCF)

- EBRD Technical Cooperation Fund
Canadian Government Programs

Market Development Programs
- Program for Export Market Development
- Trade Team Canada Missions
- Sustainable Cities Initiative

Project Development Funding
- CIDA Industrial Cooperation Program
- Clean Development Mechanism & Joint Initiative
Canadian Government Programs

Project and Trade Finance
- Export Development Canada
- Canadian Commercial Corporation
- Business Development Bank of Canada

Export Strategy and Support
- Trade Commissioner Service
- Virtual Trade Commissioner
- Trade Team Canada Sectors
- Canada Business Service Centres
- Team Canada Inc.
Hussein M. Amery
Managing Director
Integrated Development
Entreprise Associates (IDEA)

Senior Advisor
Ottawa Bureau
Saskatchewan Institute
of Applied Science and
Technology (SIAST)

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Toll Free 1-866-756-6096
Fax. 819-777-3969

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