EBRD business opportunities for Canadian companies

Break-out session

Martin Ehrenberg Head of Stakeholder Relations Technical Cooperation, EBRD

Canada, October 2016



Agenda



- A. Business opportunities for consultants
- Introduction to Technical Cooperation (TC) and related consultancy opportunities
- 2. How to start?
- 3. Selection of consultants
- 4. Contracting of consultants
- 5. Strategies for successful applications

If there should be interest:

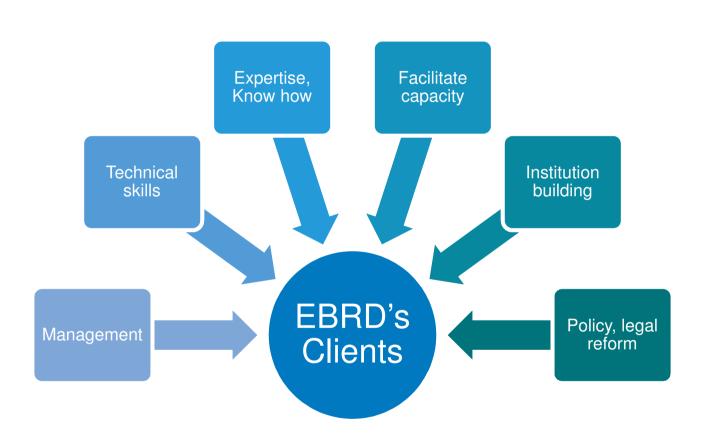
- B. Business opportunities for suppliers and contractors
- C. How to invest with the EBRD



EBRD business opportunities for consultants

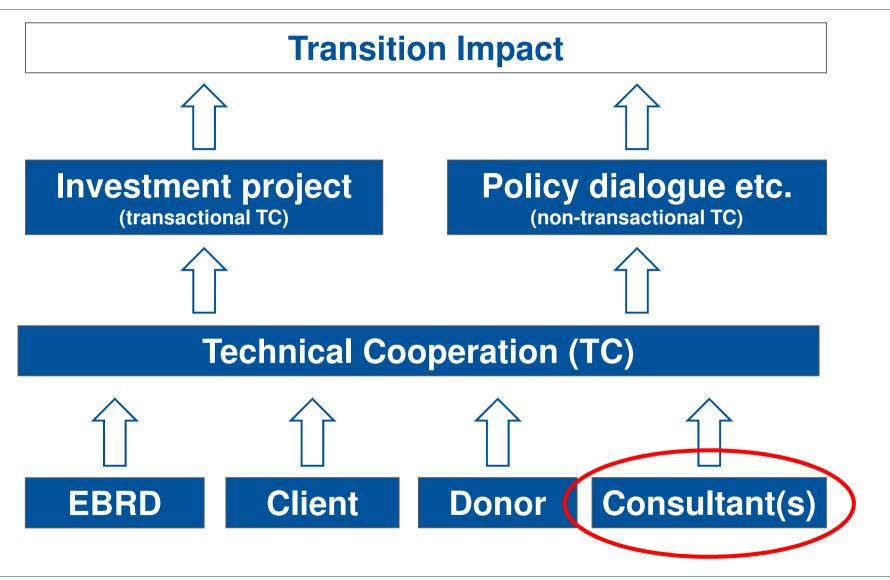
EBRD Technical Cooperation (TC) Programme - Introduction





Technical Cooperation (TC) - Introduction



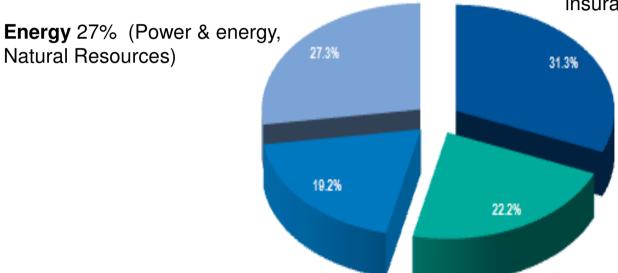


Investment portfolio by EBRD sector in 2015



Green Economy Transition 30% but crosscutting through all sectors (target 40%)

Financial Institutions 31% (Bank lending incl. finance facilities, Bank equity, small business finance, insurance and financial services)



Infrastructure 19% (Transport, Municipal & Environmental Infrastructure)

Corporate 22% (Manufacturing/Services, Agribusiness, Equity funds, Property & Tourism, Information & Communication technology)

Why we need you!



Consultancy support for investments and policy reform

- Over 30% of EBRD's investments and most policy reform activities require consultancy support
- Over 2,800 consultancy contracts for €169.6 million in 2015
- 345 new TC (consultancy) projects for €203m approved in 2015:
 - 62% investment-related TCs
 - 38% non investment-related TCs (policy reform etc.)

Examples of required consultancy services



EBRD Sector: Municipal & Environmental Infrastructure

- Technical studies
- Market studies
- Feasibility study
- Technical, financial & environmental/social due diligence
- Environmental and Social Impact Assessments (ESIA)
- Lender's monitor/engineer
- Project implementation support (project management units, design, construction/contracts supervision, procurement etc.)
- Stakeholder participation programme
- Corporate, financial and operational performance improvement programmes
- Capacity building and training

- Water
- Wastewater
- District heating
- Solid waste
- Busses/trolleybuses
- Trams
- Metro
- Ferries
- Parking
- Urban roads
- e-ticketing
- Traffic management
- Street lighting
- Tariffs, tariff policy and regulation
- Regulatory issues

Examples of required consultancy services



EBRD Sector: Green Economy Transition

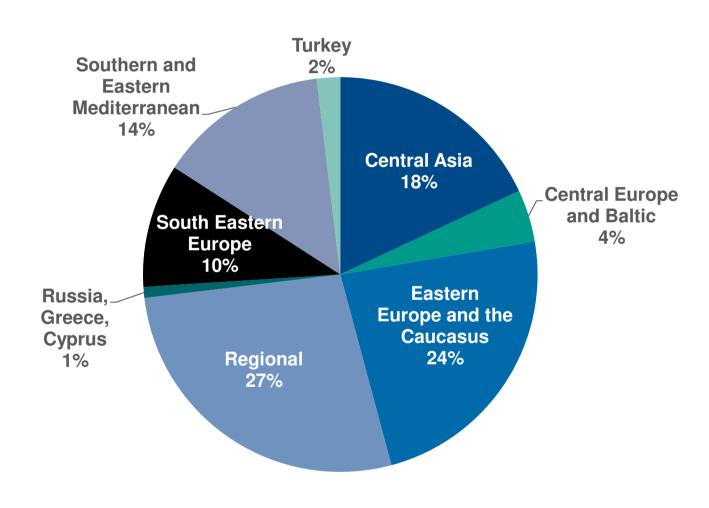
- Technical studies
- Market studies for new technologies
- Feasibility studies
- Technical, financial & environmental/social due diligence
- Energy audits
- Resource audits
- Project implementation support (e.g. advice to local banks on how to on-lend to local clients)
- Policy dialogue to address environmental market failures, strengthen the institutional or regulatory context
- Climate change action plans
- · Tariff methodology advice
- Corporate policies

- Renewable energy
- Resource efficiency (water, materials)
- EBRD sustainable energy & resource finance facilities (SEFFs)
- (Residential) buildings
- Industrial & corporate sector
- Technology transfer
- Energy Service Companies (ESCOs)
- Recycling

Consultancy opportunities approved in 2015

- Regions

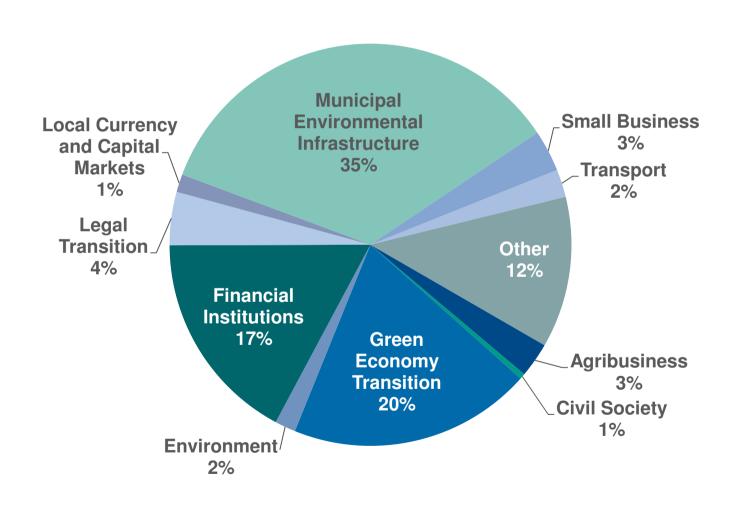




Consultancy opportunities approved in 2015

- Sectors

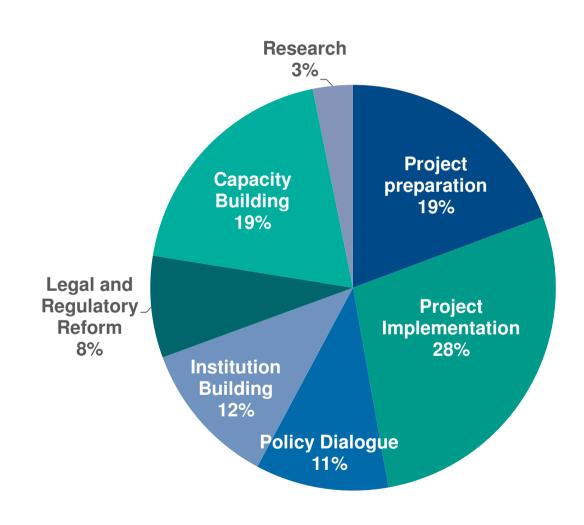




Consultancy opportunities approved in 2015

- Types of assignments







Consultant opportunities? How to start?

Do your research!



EBRD's strategic initiatives

- (1) Green Economy Transition
 http://www.ebrd.com/what-we-do/get/knowledge-hub.html
- (2) Early Transition Countries Initiative (ETC)

 http://www.ebrd.com/what-we-do/sectors-and-topics/early-transition-countries-initiative.html
- (3) Local Currency and Capital Markets Initiative (LC2) http://www.ebrd.com/what-we-do/sectors-and-topics/local-currency-and-capital-markets.html
- (4) Strategy for Promotion of Gender Equality 2016-2020 http://www.ebrd.com/gender-strategy.html
- (5) Small Business Initiative (SBI)
 http://www.ebrd.com/what-we-do/sectors-and-topics/ebrd-small-business-initiative.html
- (6) Investment Climate and Governance Initiative (ICGI) http://www.ebrd.com/what-we-do/sectors-and-topics/ebd-icg-initiative.html

Do your research!



Other information

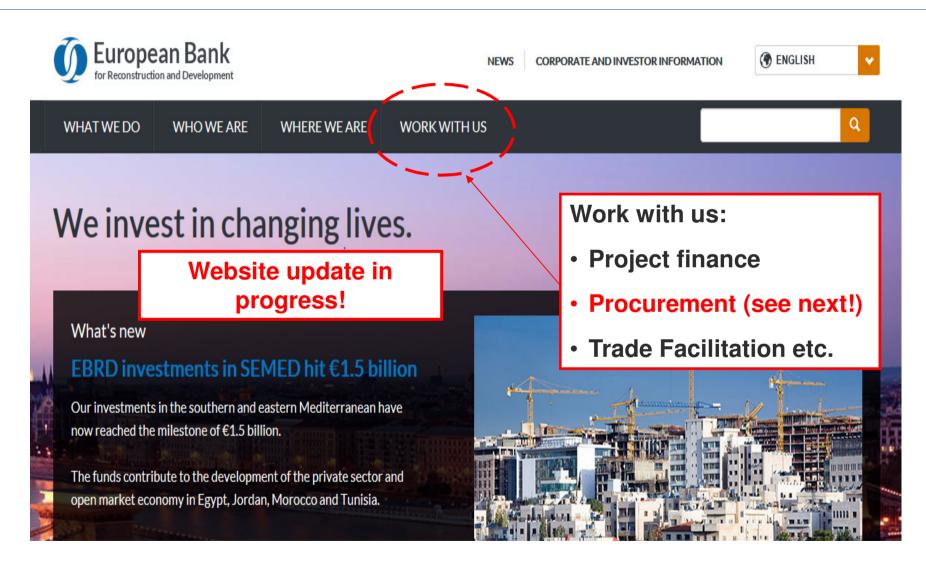
- (1) Factsheets for EBRD countries, key sectors and themes http://www.ebrd.com/news/publications/factsheets.html
- (2) Country strategies
 http://www.ebrd.com/what-we-do/strategies-and-policies.html
- (3) Banking sector strategies http://www.ebrd.com/what-we-do/strategies-and-policies.html
- (4) Sector-specific information, for example on Sustainable Energy Financing Facilities (SEFF) http://www.ebrd.com/what-we-do/sectors-and-topics/sustainable-resources/seffs.html
- (5) Environmental & Social Impact Assessments http://www.ebrd.com/esia.html
- (6) Project Summary Documents (with references to required TC/consultancy support)

http://www.ebrd.com/work-with-us/project-finance/project-summary-documents.html

http://www.ebrd.com/work-with-us/project-finance/technical-cooperation-project-summary-documents.html

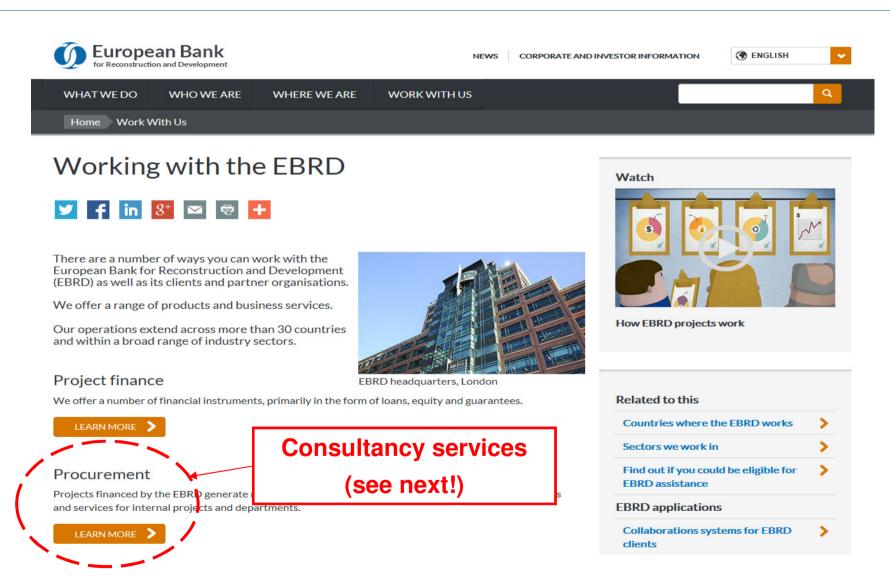
Consultant opportunities? Research ebrd.com!





Consultant opportunities? Research ebrd.com!





Consultant opportunities? Research ebrd.com!





Selection and engagement of consultants for the needs of the Bank and its Clients falls under responsibility of the Technical Cooperation team

LEARN MORE >

Outside Counsel Services

Selection and engagement of outside counsel for the needs of Office of the General Counsel (OGC).

LEARN MORE 🗦

Consultancy Services:

- Procurement Notices
- eSelection system
- Guidelines
- Reports & Data

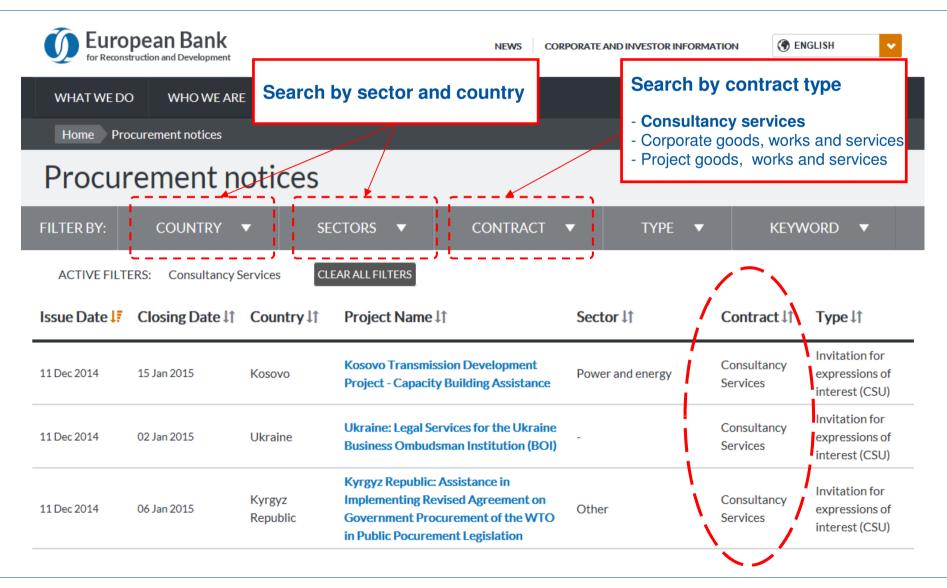
Procurement FAQs

Further detail on our procurement opportunities and processes.



How to start? Assess procurement notices!





How to start? Register to eSelection



- Web-based eSelection ensures transparency, efficiency, level playing field and cost reductions as a result of on-line submissions
- Register: https://eselection.ebrd.com/suite/
- Consultants can:
 - (1) Subscribe for **electronic notification** about new opportunities by industry sector and area of expertise:
 - (2) Submit expressions of interest & proposals (including financial proposals) on-line/electronically
 - (3) View the status of application, manage participation in selection processes and monitor the progress of any selection process

Register to eSelection:

https://eselection.ebrd.com/suite/





What is eSelection?

eSelection is a secure Internet application allowing participation in the selection process for consultancy assignments for which EBRD is responsible.

Who can register?

- Individual consultants or individuals representing their respective firms.
- 2. All law firms on an office by office basis.

Why register?

 (Consultant) As a registered user you will be able to create your own profile and subscribe for the sectors and areas of expertise of interest to you. You will then be automatically alerted of upcoming opportunities as they arise.

Send a query or request assistance

Register here Username **Password** Register for a Consultant Account Log in Contact Us Register a Law Firm Contact Legal Department Forgot Password Sends email with link

to reset password



The EBRD's Procurement Policies and Rules (PP&R):

Selection of consultants

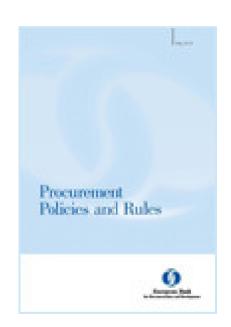
EBRD's Procurement Policies & Rules (PP&R)



 Revised Procurement Policies & Rules (PP&R), revised October 2014:

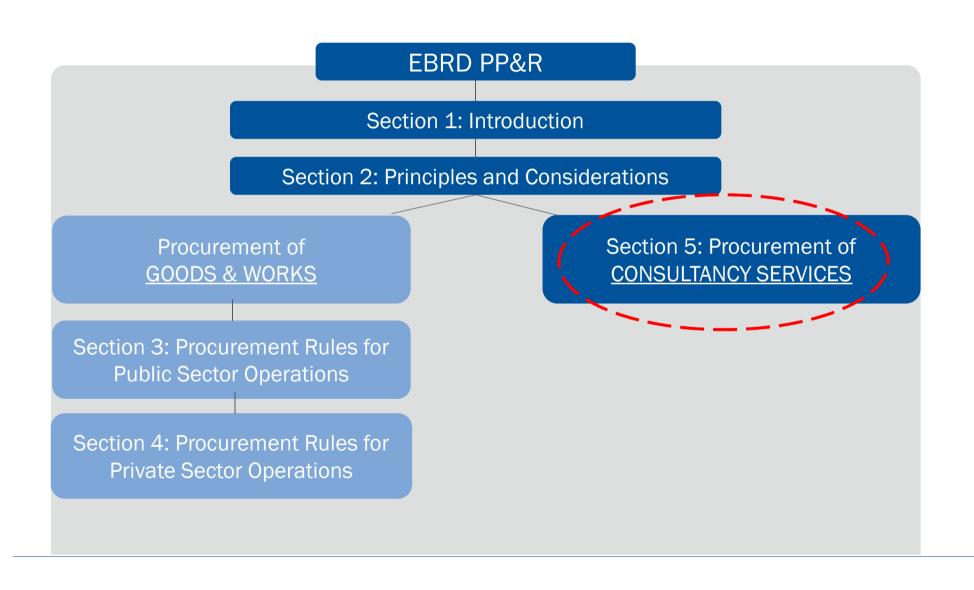
http://www.ebrd.com/work-with-us/procurement/policies-and-rules.html

- Based on fundamental principles of economy, efficiency, accountability, non-discrimination, fairness and transparency
- In principle no eligibility restrictions, no domestic/member states preference (exception: tied donor funds)
- Main consideration is capability to perform the contract



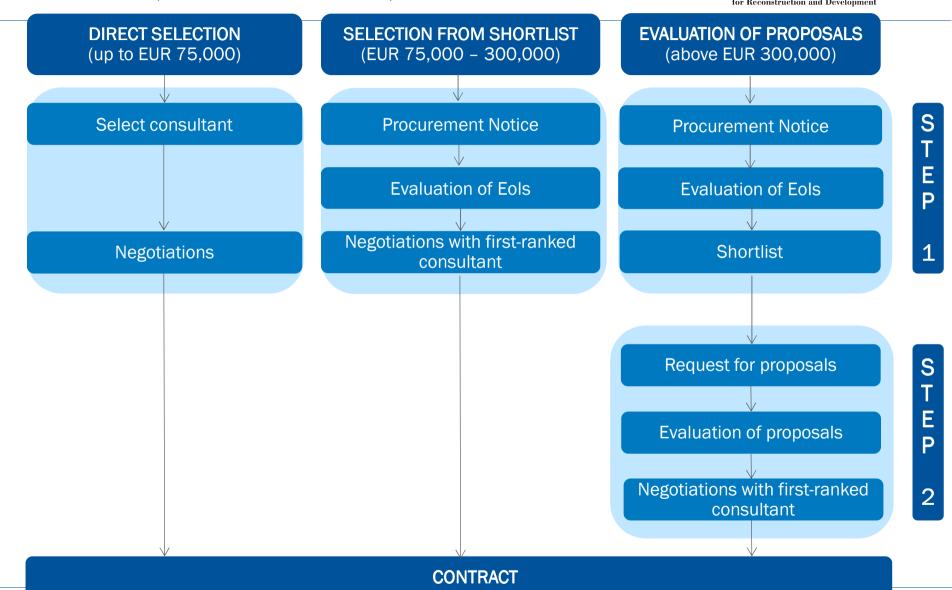
EBRD's Procurement Policies & Rules (PP&R)





Overview of procedures for consultant selection (EBRD or Clients)





Shortlisting – Requirements for EoIs



Expression of Interests (EoIs) and Shortlisting

Standard template for Eol

(but consultant declaration)

No

Financial capacity (minimum turnover, profit)

No

Professional & technical capacity (number of staff or experts)

No

Publication of shortlist criteria

Yes

Project references

Yes (but no standard template)

CVs

Yes (but no standard template)

Shortlisting



Expression of Inte	rests (Eols) and	Shortlisting
---------------------------	------------------	---------------------

Evaluation method

Primarily scoring of project references & CVs, generally no pass/fail tests

Shortlist

3 - 6 (provided those are capable and qualified)

Geographic limits

1. no more than two firms from any one country and

2. at least one firm from a country of operation

Publication of shortlist

After award on ebrd.com

Evaluation of Proposals



Evaluation of Proposals

Technical evaluation criteria

Tailored to assignment with focus on approach and key experts, interviews for complex or pilot assignments

Weight of financial proposal

Case by case (0%-30%, standard 20%)

Public opening of tech. and fin. proposals

For Client-led selections only

Documentary evidence

Hardly any administrative compliance, methodology and CVs matter!



Contracting of consultants

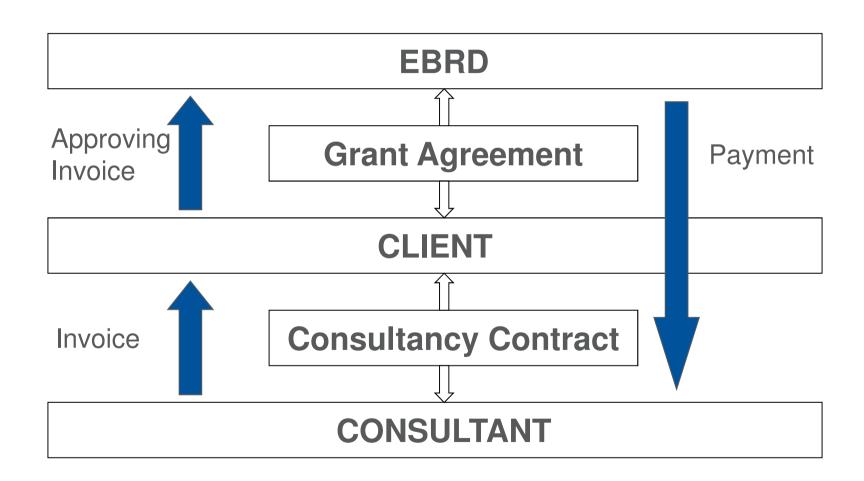
Contracting (general)



- EBRD's contract templates provide for a fair balance between interests of EBRD/Client and consultant
- Payment terms and advance are subject to negotiations and are tailored to each assignment (lump sums vs time-based)
- EBRD is providing advice on negotiations and is issuing final versions of contracts even if Client is contracting the consultant
- If there are no specific risks EBRD can accommodate small firms (for example on professional liability insurance)
- EBRD contracts include inter alia:
 - Bank contract for firms and individual experts
 - Framework agreements/contracts and call-offs
 - Contracts for consultants contracted by Client

Contracting/payments: Client is contracting consultant



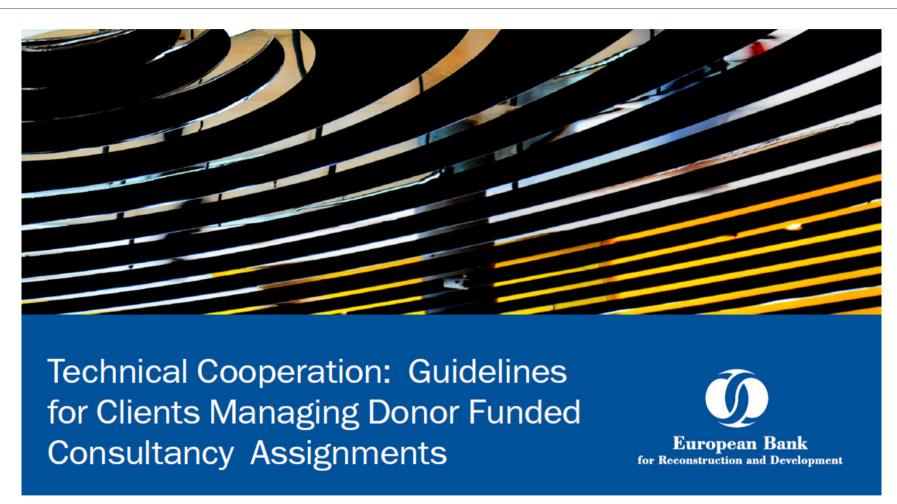




Strategies for successful applications

Understand how EBRD's Clients select/contract/manage consultants for TCs





http://www.ebrd.com/work-with-us/procurement/consultancy-services.html

MDB Harmonised Request for Proposals (RFP)

http://www.ebrd.com/work-with-us/procurement/project-procurement/standard-tender-documents.html



NEWS



WHAT WE DO WHO WE ARE WHERE WE ARE WORK WITH US

Home Work With Us Procurement Project procurement Standard Tender

EBRD Procurement Standard Tender Documents for Client-led TCs

Consulting Services

September 2012 EBRD Harmonised Trial versions

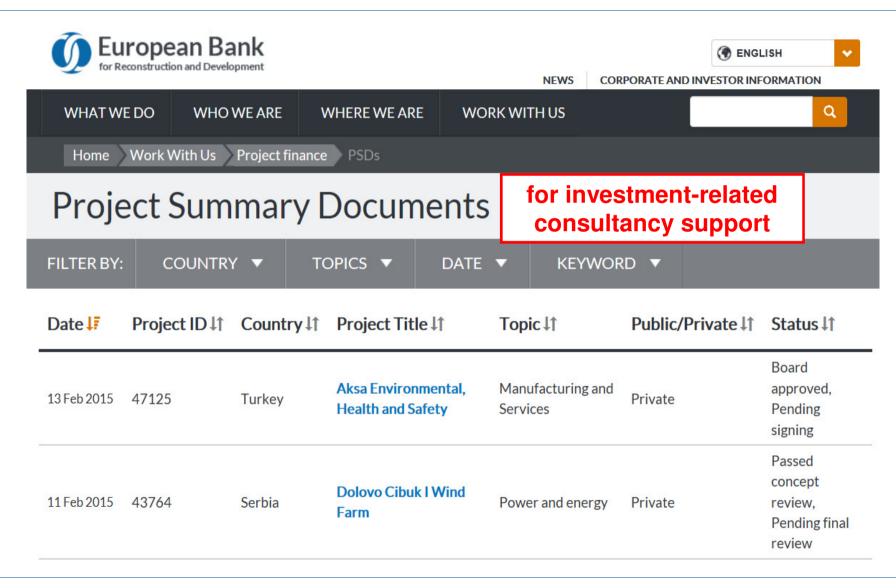
Standard Request for Proposals: Selection of Consultants (PDF)

Standard Request for Proposals: Selection of Consultants (DOC)

Assess pipeline of opportunities!







Example of Project Summary Document



Tajik Water II - Central Water Rehabilitation

Country: Tajikistan

Project number: 47057

Business sector: Municipal and

Notice type: Public

Target board date: 08 Jul 2015

Status: Passed concer

PSD disclosed: 27 Jan 2015

Project description and objective

The Tajik Water II Project (the Project) would be a Integrated Approach and provide financing to furt and wastewater improvements in the 20 cities wh KMK.

Technical cooperation

The following technical co-operation (TC) assignments are envisaged as part of this sub-project:

Pre-Signing

• Feasibility Study: to assist the Bank with due diligence, including investment component selection from the existing Long Term Investment Plans and preparation of a procurement plan for each RWC, an environmental and social due diligence update, a creditworthiness and financial analysis, legal due diligence and an institutional analysis on the proposed project structure. The cost of the assignment is USD 475,000, financed by the Government of Austrian.

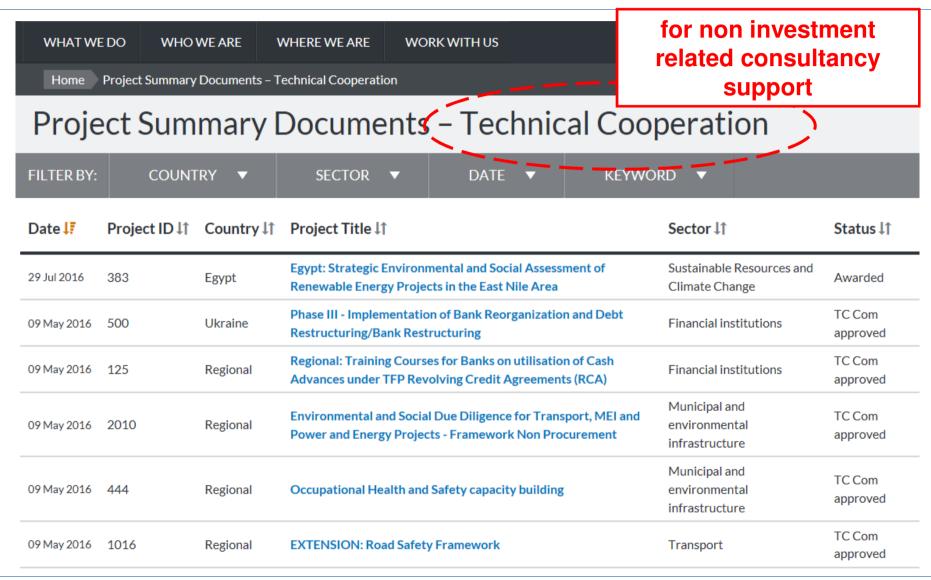
Post-Signing

Project Implementation Support: to assist the project implementation unit with engineering design, procurement, preparation and evaluation of tenders, contract award and administration, financial control, sub-project management and reporting. The estimated cost of the assignment is USD 800,000, proposed to be

Assess pipeline of opportunities!

http://www.ebrd.com/work-with-us/project-finance/technical-cooperation-project-summary-documents.html





Join forces



Be realistic! Can you match the submission/ evaluation criteria? If not, consider

- (1) **consortia** or sub-contracting opportunities, identify potential local, regional or international **partner firms** to complement your firm's strengths (know-how, project references, key experts)
- (2) engaging **external experts** to satisfy requirements related to key personnel

EBRD contract award notices/shortlists



http://www.ebrd.com/work-with-us/procurement/consultancy-services.html



Proj ID	Title	Project Country	Contract Value (EUR)	EBRD Signed Date	Success Status	Consultant Name	Consultant Nationality	Selection Adviser
38051	Kyrgyz Republic: Talas Water and	Kyrgyz	498,085.00	07/02/2014	Winner	SWECO HYDROPROJEKT AS	CZECH REPUBLIC	Jenny
	Wastewater - PIU Support including Engineering, Design and Contracts Supervision	Republic			Short Listed	KEYSTONE ENGINEERING SE	CZECH REPUBLIC	Scheffel
38949	Kyrgyz Water and Wastewater Framework - Kant Water Project -	Kyrgyz Republic	160,000.00	07/02/2014	Winner	THE INSTITUTE FOR URBAN ECONOMICS LLC	RUSSIAN FEDERATION	Larissa Gosling
	City and Company Support				Short Listed	CAI CONSULTING	KYRGYZ REPUBLIC	
					Short Listed	CORPORATE SOLUTIONS CONSULTING LIMITED	UNITED KINGDOM	
					Short Listed	FICHTNER GMBH & CO KG	GERMANY	
					Short Listed	GMCS-PRAHA SRO	CZECH REPUBLIC	
					Short Listed	SEURECA	FRANCE	
39822	Tajikistan: Khujand Wastewater Rehabilitation Project (Phase III) -	Tajikistan	135,000.00	06/01/2014	Winner	HOLINGER IC INTERNATIONAL CONSULTANTS	SWITZERLAND	Jenny Scheffel
	Technical, Financial and				Short Listed	ERNST BASLER + PARTNER LTD	SWITZERLAND]
	Environmental and Social Due Diligence				Short Listed	FICHTNER GMBH & CO KG	GERMANY	1
	Diligorico				Short Listed	GEA ENGINEERING PC	UNITED STATES	1
					Short Listed	GRONTMIJ - CARL BRO AS	DENMARK	1

"Be kind to evaluators" Assess notice & evaluation criteria



Albert Einstein:

"Not everything that counts can be counted and not everything that can be counted counts"

	Criteria	Weight	Min. Acceptable Threshold (% of max.)
1.	Specific experience and capability of the consultant firm(s) related to the assignment:	5	-
	 experience in similar assignments - 60% 		
	 experience in similar locations - 20% 		
	 structure, organisation, capacity of firm - 20% 		
2.	Adequacy of the proposed work plan and methodology in responding to the TOR:	30	70
	 understanding of assignment – 20% 		
	 approach and methodology – 30% 		
	 work plan and team assignments – 50% 		
3.	Qualifications and competence of the key personnel for the assignment:	45	70
	 Key Expert No 1: Project Manager – 50% 		
	 Key Experts No 2: Training Expert 1 − 25% 	100	
	 Key Experts No 3: Training Expert 2 – 25% 		
	Each of the key personnel listed above will be evaluated as follows:		
	 general qualifications – 10% 		
	 specific experience and expertise related to the their task - 60% 		
	 experience in region – 10% 		
	 Fluency in Russian – 20% 		
4.	Other factors		
	Interviews	20	_
TO	ΓAL	100	70

	Criteria	Weight	Min. Acceptable Threshold (% of max.)	
1.	Specific experience and capability of the consultant firm(s) related to the assignment:	5	-	
	 experience in similar assignments - 60% (3%) 			
	 experience in similar locations - 20% (1%) 			
	 structure, organisation, capacity of firm - 20% (1%) 			
2.	Adequacy of the proposed work plan and methodology in responding to the TOR:	30	70	
	 understanding of assignment – 20% (6%) 			
	 approach and methodology – 30% (9%) 			
	 work plan and team assignments – 50% (15%) 			
3.	Qualifications and competence of the key personnel for the assignment:	45	70	
	 Key Expert No 1: Project Manager – 50% (22.5%) 		Qualification (2.25%)	
	 Key Experts No 2: Training Expert 1 – 25% (11.5%) 	\Box :	Expertise related to the to Regional experience (2.2	
	 Key Experts No 3: Training Expert 2 – 25% (11.5%) 	$\overline{}$	Russian (5%)	
	Each of the key personnel listed above will be evaluated as follows:			
	 general qualifications – 10% 		Qualification (1.125%)	1.45 7.50
	 specific experience and expertise related to the their task 60% 	:	Expertise related to the t Regional experience (1.1 Russian (2.5%)	
	 experience in region – 10% 		I	l
	 Fluency in Russian – 20% 			
4.	Other factors			
	• Interviews	20	-	
TO	ΓAL	100	70	

Define input of key experts!



Team Composition, Assignment and Key Experts' inputs

N°	Name			Exp	ert's input (in	person/month)	per each Deliv	verable (listed in 1	TECH-51	To (tal time-in (in Months)	put)
		Position		D-1	D-2	D-3		D		Home	Field	Total
KEY	EXPERTS	<u> </u>	•									
K-1	{e.g., Mr. Abbbb}	[Team Leader]	[Home] [Field]	[2 month] [0.5 m]	[1.0]	[1.0]						
K-2												
K-3												
n												
								Subtotal				
NON	-KEY EXPERTS											
N-1			[Home] [Field]									
N-2												
n												
								Subtotal				
								Total				

"Be kind to evaluators" – Consider complexity of assignment



Key Question: Required tasks, activities and deliverables already well-defined in the Terms of Reference (ToR)?

If yes,

- do not re-invent the wheel
- keep the methodology brief
 - focus on key challenges
- focus on CVs, "team assignment" and local partners

"Be kind to evaluators" – Who evaluates?



Key Question: Who is addressee? Who will evaluate/contract selected firm?

EBRD or the Client?

Are evaluators "EBRD bankers, managers of private company, civil servants or employees of municipality"?

The financial proposal



Key lessons

- Understand the budget ("cost estimate" or "maximum amount"?)
- Consider weight for financial offer (generally 20%)
- No standard or maximum fee rates for experts
- Generally no minimum working days but preference for "field" days
- Per diems negotiable but capped at UN or EU rules
- Reimbursable expenses in addition to fees (project office, flights, communication etc.)
- Exclusive of indirect taxes (VAT or equivalent)
- Details matter, but during negotiations EBRD willing to consider lump sums against milestones

"Be kind to evaluators" – Be focused and concise!



- Consider your application from perspective of evaluation committee. Are you able to easily assess your firm's strengths and compliance with evaluation criteria?
- Submit documents that are
 - (1) tailored (adapt your regular standard documents)
 - (2) **focussed** (all key points/evaluation criteria addressed?)
 - (3) concise (table of content, clear structure & headlines, easy to assess, short sentences, use tables instead of running text when appropriate etc.)
 - (4) **accessible** (submit one pdf-file not many)

"Be kind to evaluators" – Example for project references



Re	efere No	ence).	Assign Titl							
Nam Firm		Country	Overall Assignment Budget (EUR)	Proportion carried out by Consultant (%)	No of Staff provide		Name of Client (public/ private)	Funding Source/ Donor	Duration	Partners
Detailed Description of Assignment					Consulting Services Provided					
1)	Bac	kgroun	ıd			1)	Key	Tasks p	er Obje	ctive
2)	Ove	erall Ob	jectives			2)	Activ	ities pe	r Key Ta	ısks
3)	Res	sults/Oเ	utcome			3)	Deli	verables	/Output	S

"Be kind to evaluators" – Example for describing experts' experience



Assignment Title:	
Duration: (m/year) to (m/year)	
Country:	
Company/Client/ Donor:	
Expert's Position/ Job Title:	
Description:	 Relevant Responsibilities/Tasks Relevant Activities Relevant Deliverables/Outputs

Avoid the "big don'ts"



- Do not submit financial offer when selection is based on quality and do not add financial offer to EoI (unless otherwise requested)
- Do not reveal financial offer (ensure confidentiality!)
- Do not apply if your firm is not eligible (check eligibility clause in notice)
- Do not submit late
- Do not liaise with EBRD/Client after publication of notice (apart from requests for clarifications via instructions)
- Do not stay silent on conflict of interest!

Enquiries re consultant opportunities?





- Every procurement notice provides the name and contact details (phone, email address) of an EBRD TC Advisor
- For general enquiries send an email to eselection@ebrd.net or consultants@ebrd.com
- Contact myself (see last slide)

Contact



For all further enquiries, please contact:

Name: Martin Ehrenberg

Title: Head of Stakeholder Relations Department: Technical Cooperation

Tel: + 44 20 7338 7657 Email: ehrenbem@ebrd.com

Name: Leonor Fontoura

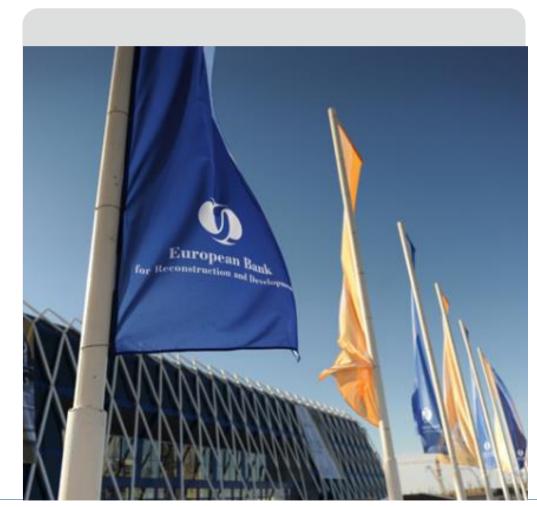
Title: Business Development

Representative

Department: EBRD Office North

America

Tel: + +1 202 846 1316 Email: fontourl@ebrd.com





EBRD business opportunities for suppliers & contractors

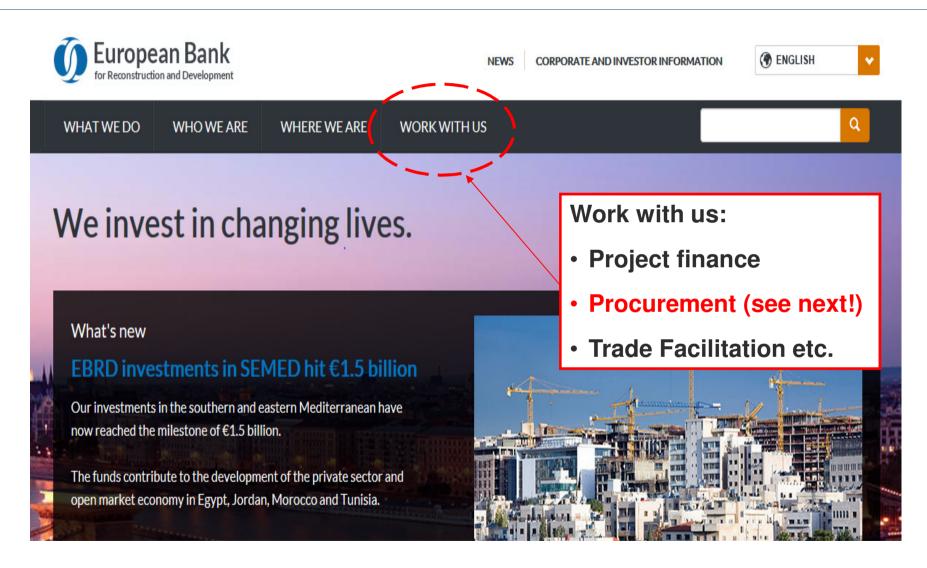
General procurement statistics (goods, works)



Contract Size (€M)	Works	Supply & Installation	Goods	Consultant Services	Total
0~0.3	5	2	46	18	71
0.3~7.5	54	11	35	5	105
>7.5	18	10	6	0	34
Total	77	23	87	23	210
Total Value (€)	456,263,027	347,804,438	220,211,742	11,535,802	1,035,815,009
Average Value (€)	5,925,494	15,121,932	2,531,169	501,557	4,932,452

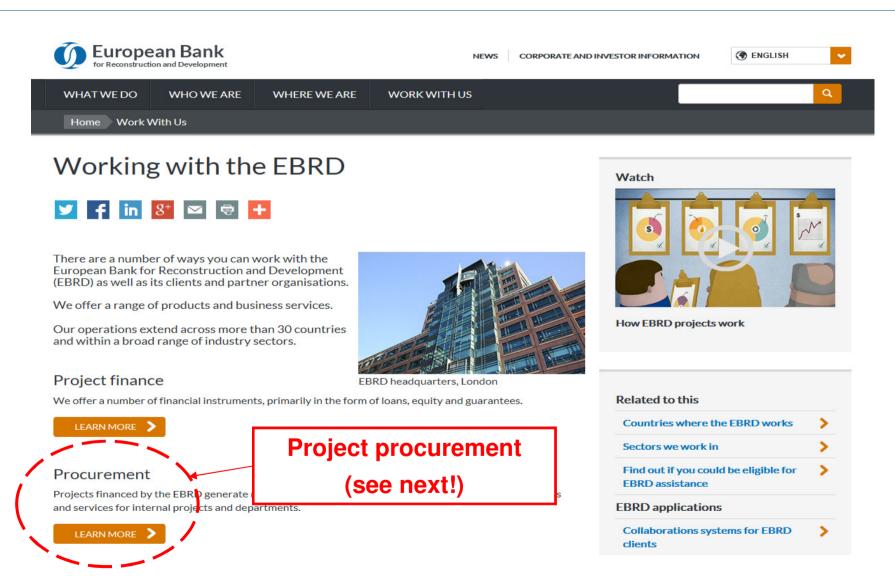
Opportunities for suppliers & contractors? Research ebrd.com!





Opportunities for suppliers & contractors? Research ebrd.com!



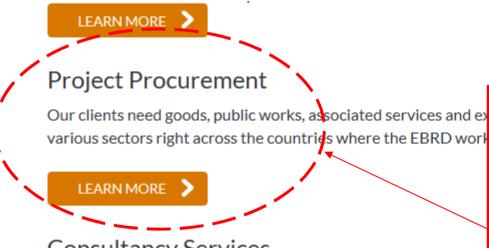


Opportunities for suppliers & contractors? Research ebrd.com!



Corporate Procurement

We seek products, services and experts for internal EBRD projects and departments at our London headquarters and our network of regional offices.



Consultancy Services

Selection and engagement of consultants for the needs of the Ba of the Technical Cooperation team

Project procurement:

- Procurement Notices
- Contract awards
- Contract pipeline
- Standard procurement documents
- Guidance notes

Opportunities for suppliers & contractors? Research procurement notices



Procur	ement n	otices				
FILTER BY:	COUNTRY	▼ SI	ECTORS ▼ CONTRACT	▼ TYP	E ▼ K	EYWORD ▼
ACTIVE FILT	ERS: Project goods	, works and servi	ices CLEAR ALL FILTERS		/->	
Issue Date 1.	Closing Date ↓↑	Country↓↑	Project Name↓↑	Sector ↓↑	Contract ↓↑	Type↓↑
27 Aug 2015	27 Aug 2016	Romania	Brasov Urban Transport Project - Extension	Municipal and environmental infrastructure	Project goods, works and services	General Procurement notices
26 Aug 2015	12 Oct 2015	Kyrgyz Republic	Bishkek Solid Waste Project	Municipal and environmental infrastructure	Project goods, works and services	Invitation for tenders
26 Aug 2015	16 Oct 2015	Kyrgyz Republic	Kant Water Project	Municipal and environmental infrastructure	Project goods, works and services	Invitation for tenders
26 Aug 2015	15 Oct 2015	Kyrgyz Republic	Kant Water Project	Municipal and environmental infrastructure	Project goods, works and services	Invitation for tenders

Goods & works? Do your research!



http://www.ebrd.com/work-with-us/procurement/project-procurement.html

Current Notices	<u> </u>
List of prequalified Tenderers and Shortlisted Consultants	
Contract Awards Notification	>
Contract Pipeline Look here if you want to be well prepared!	>
List of entities and individuals which are ineligible to become an EBRD Counterparty	>
earn more about Project Procurement Procurement Policies and Rules and Related Bank Policies	
Procurement Policies and Rules and Related Bank Policies	>
Procurement Policies and Rules and Related Bank Policies Integrity and Compliance	>
Procurement Policies and Rules and Related Bank Policies	> >
Procurement Policies and Rules and Related Bank Policies Integrity and Compliance	> > >
Procurement Policies and Rules and Related Bank Policies Integrity and Compliance Standard Procurement Documents and Guidance Notes	> > >

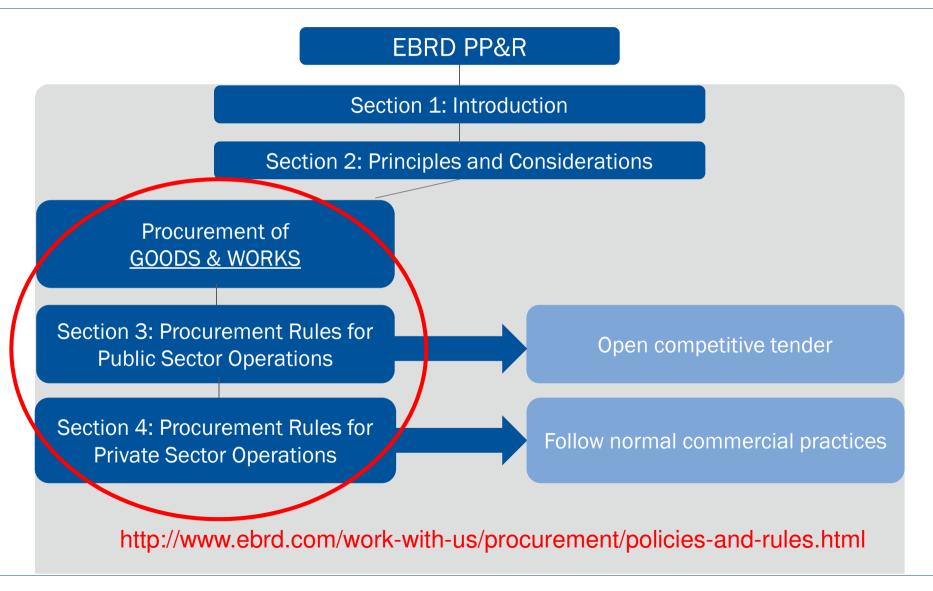


The EBRD's Procurement Policies and Rules (PP&R):

Procurement of goods and works

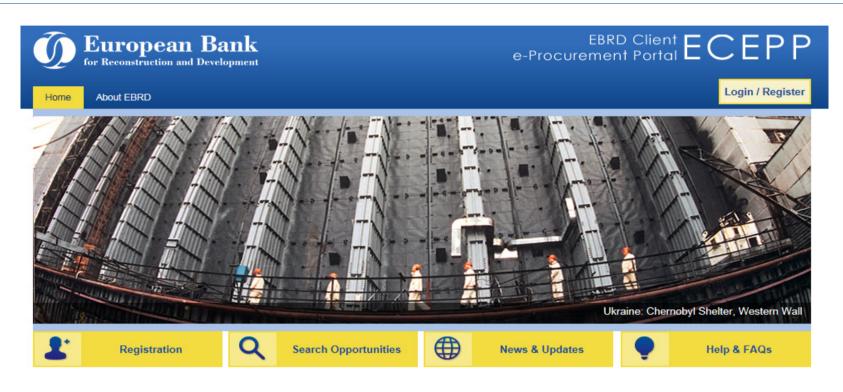
EBRD's Procurement Policies & Rules (PP&R) – Goods & works





E-procurement for suppliers and contractors https://ecepp.ebrd.com/





Welcome to the EBRD Client e-Procurement Portal (ECEPP)

The ECEPP portal allows clients of the European Bank for Reconstruction and Development (EBRD) to conduct electronic project procurement for goods, works and loan-funded consultancy contracts for public sector projects financed in whole or in part by EBRD (including EBRD administered grants), in accordance with the EBRD's Procurement Policies and Rules [3].

Latest News

- EBRD Client e-Procurement Portal: process efficiency at work
- A New Video for Suppliers and Contractors

Enquiries re goods & works opportunities?



- For specific tender-related enquiries every procurement notice provides the name and contact details of EBRD's client
- For general enquiries regarding EBRD's project procurement (goods & works) send an email to EBRD's Procurement Policy Department (projectprocurement@ebrd.com)
- Contact myself (see last slide)

Contact



For all further enquiries, please contact:

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