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
   1. 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

Transition Impact

Investment project
(transactional TC)

Policy dialogue etc.
(non-transactional TC)

Technical Cooperation (TC)

EBRD  Client  Donor  Consultant(s)
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)

**Energy** 27% (Power & energy, Natural Resources)

**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

- Central Asia: 18%
- Eastern Europe and the Caucasus: 24%
- Regional: 27%
- Southern and Eastern Mediterranean: 14%
- Russia, Greece, Cyprus: 1%
- South Eastern Europe: 10%
- Turkey: 2%
- Central Europe and Baltic: 4%
Consultancy opportunities approved in 2015 - Sectors

- Municipal Environmental Infrastructure: 35%
- Green Economy Transition: 20%
- Financial Institutions: 17%
- Local Currency and Capital Markets: 1%
- Legal Transition: 4%
- Environment: 2%
- Other: 12%
- Small Business: 3%
- Transport: 2%
- Agribusiness: 3%
- Civil Society: 1%
Consultancy opportunities approved in 2015
- Types of assignments

- Project preparation: 19%
- Project Implementation: 28%
- Policy Dialogue: 11%
- Institution Building: 12%
- Legal and Regulatory Reform: 8%
- Capacity Building: 19%
- Research: 3%
Consultant opportunities?
How to start?
EBRD’s strategic initiatives

(1) Green Economy Transition

(2) Early Transition Countries Initiative (ETC)

(3) Local Currency and Capital Markets Initiative (LC2)

(4) Strategy for Promotion of Gender Equality 2016-2020

(5) Small Business Initiative (SBI)

(6) Investment Climate and Governance Initiative (ICGI)
<table>
<thead>
<tr>
<th></th>
<th>Other information</th>
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<tbody>
<tr>
<td>(1)</td>
<td>Factsheets for EBRD countries, key sectors and themes</td>
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<td>(2)</td>
<td>Country strategies</td>
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<tr>
<td>(3)</td>
<td>Banking sector strategies</td>
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<tr>
<td>(4)</td>
<td>Sector-specific information, for example on Sustainable Energy</td>
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<tr>
<td></td>
<td>Financing Facilities (SEFF)</td>
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<tr>
<td>(5)</td>
<td>Environmental &amp; Social Impact Assessments</td>
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<tr>
<td>(6)</td>
<td>Project Summary Documents (with references to required</td>
</tr>
<tr>
<td></td>
<td>TC/consultancy support</td>
</tr>
</tbody>
</table>
Consultant opportunities?
Research ebrd.com!

Website update in progress!

Work with us:
• Project finance
• Procurement (see next!)
• Trade Facilitation etc.
Consultant opportunities?
Research ebrd.com!

Working with the EBRD

There are a number of ways you can work with the European Bank for Reconstruction and Development (EBRD) as well as its clients and partner organisations.

We offer a range of products and business services.

Our operations extend across more than 30 countries and within a broad range of industry sectors.

Project finance
We offer a number of financial instruments, primarily in the form of loans, equity and guarantees.

Consultancy services (see next!)

Procurement
Projects financed by the EBRD generate and services for internal projects and departments.
Consultant opportunities? Research ebrd.com!

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

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

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!

Search by sector and country:
- Consultancy services
- Corporate goods, works and services
- Project goods, works and services

Search by contract type:
- Consultancy services
- Invitation for expressions of interest (CSU)
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?
1. Individual consultants or individuals representing their respective firms.
2. All law firms on an office by office basis.

Why register?
1. (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.

Register here

Send a query or request assistance

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:
  

- 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
Overview of procedures for consultant selection (EBRD or Clients)

1. **DIRECT SELECTION** (up to EUR 75,000)
   - Select consultant
   - Negotiations

2. **SELECTION FROM SHORTLIST** (EUR 75,000 - 300,000)
   - Procurement Notice
   - Evaluation of EoIs
   - Negotiations with first-ranked consultant

3. **EVALUATION OF PROPOSALS** (above EUR 300,000)
   - Procurement Notice
   - Evaluation of EoIs
   - Shortlist
   - Request for proposals
   - Evaluation of proposals
   - Negotiations with first-ranked consultant

4. **CONTRACT**
## Shortlisting – Requirements for EoIs

### Expression of Interests (EoIs) and Shortlisting

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Requirement Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard template for EoI</td>
<td>No (but consultant declaration)</td>
</tr>
<tr>
<td>Financial capacity (minimum turnover, profit)</td>
<td>No</td>
</tr>
<tr>
<td>Professional &amp; technical capacity (number of staff or experts)</td>
<td>No</td>
</tr>
<tr>
<td>Publication of shortlist criteria</td>
<td>Yes</td>
</tr>
<tr>
<td>Project references</td>
<td>Yes (but no standard template)</td>
</tr>
<tr>
<td>CVs</td>
<td>Yes (but no standard template)</td>
</tr>
</tbody>
</table>
# Expression of Interests (EoIs) and Shortlisting

<table>
<thead>
<tr>
<th>Evaluation method</th>
<th>Primarily scoring of project references &amp; CVs, generally no pass/fail tests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shortlist</td>
<td>3 - 6 (provided those are capable and qualified)</td>
</tr>
<tr>
<td>Geographic limits</td>
<td>1. no more than two firms from any one country and 2. at least one firm from a country of operation</td>
</tr>
<tr>
<td>Publication of shortlist</td>
<td>After award on ebrd.com</td>
</tr>
</tbody>
</table>
## Evaluation of Proposals

<table>
<thead>
<tr>
<th>Evaluation of Proposals</th>
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</thead>
<tbody>
<tr>
<td>Technical evaluation criteria</td>
</tr>
<tr>
<td>Weight of financial proposal</td>
</tr>
<tr>
<td>Public opening of tech. and fin. proposals</td>
</tr>
<tr>
<td>Documentary evidence</td>
</tr>
</tbody>
</table>
Contracting of consultants
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

- EBRD
  - Grant Agreement
    - Consultancy Contract
      - Invoice
      - Payment
    - Approving Invoice
  - Payment
Strategies for successful applications
Understand how EBRD’s Clients select/contract/manage consultants for TCs

Technical Cooperation: Guidelines for Clients Managing Donor Funded Consultancy Assignments

MDB Harmonised Request for Proposals (RFP)


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!


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- **European Bank for Reconstruction and Development**

**Project Summary Documents**

<table>
<thead>
<tr>
<th>Date</th>
<th>Project ID</th>
<th>Country</th>
<th>Project Title</th>
<th>Topic</th>
<th>Public/Private</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 Feb 2015</td>
<td>47125</td>
<td>Turkey</td>
<td>Aksa Environmental, Health and Safety</td>
<td>Manufacturing and Services</td>
<td>Private</td>
<td>Board approved, Pending signing</td>
</tr>
<tr>
<td>11 Feb 2015</td>
<td>43764</td>
<td>Serbia</td>
<td>Dolovo Cibuk I Wind Farm</td>
<td>Power and energy</td>
<td>Private</td>
<td>Passed concept review, Pending final review</td>
</tr>
</tbody>
</table>

*for investment-related consultancy support*
**Example of Project Summary Document**

**Tajik Water II - Central Water Rehabilitation**

- **Country:** Tajikistan
- **Project number:** 47057
- **Business sector:** Municipal and community services
- **Notice type:** Public
- **Target board date:** 08 Jul 2015
- **Status:** Passed concept
- **PSD disclosed:** 27 Jan 2015

Project description and objectives:
The Tajik Water II Project (the Project) would be an Integrated Approach and provide financing to further and wastewater improvements in the 20 cities within the 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 this assignment is USD 475,000, financed by the Government of Austria.

**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!


for non investment related consultancy support

<table>
<thead>
<tr>
<th>Date</th>
<th>Project ID</th>
<th>Country</th>
<th>Project Title</th>
<th>Sector</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 Jul 2016</td>
<td>383</td>
<td>Egypt</td>
<td>Egypt: Strategic Environmental and Social Assessment of Renewable Energy Projects in the East Nile Area</td>
<td>Sustainable Resources and Climate Change</td>
<td>Awarded</td>
</tr>
<tr>
<td>09 May 2016</td>
<td>500</td>
<td>Ukraine</td>
<td>Phase III - Implementation of Bank Reorganization and Debt Restructuring/Bank Restructuring</td>
<td>Financial Institutions</td>
<td>TC Com approved</td>
</tr>
<tr>
<td>09 May 2016</td>
<td>125</td>
<td>Regional</td>
<td>Regional: Training Courses for Banks on utilisation of Cash Advances under TFP Revolving Credit Agreements (RCA)</td>
<td>Financial Institutions</td>
<td>TC Com approved</td>
</tr>
<tr>
<td>09 May 2016</td>
<td>2010</td>
<td>Regional</td>
<td>Environmental and Social Due Diligence for Transport, MEI and Power and Energy Projects - Framework Non Procurement</td>
<td>Municipal and environmental infrastructure</td>
<td>TC Com approved</td>
</tr>
<tr>
<td>09 May 2016</td>
<td>444</td>
<td>Regional</td>
<td>Occupational Health and Safety capacity building</td>
<td>Municipal and environmental infrastructure</td>
<td>TC Com approved</td>
</tr>
<tr>
<td>09 May 2016</td>
<td>1016</td>
<td>Regional</td>
<td>EXTENSION: Road Safety Framework</td>
<td>Transport</td>
<td>TC Com approved</td>
</tr>
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</table>
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


<table>
<thead>
<tr>
<th>Proj ID</th>
<th>Title</th>
<th>Country</th>
<th>Contract Value (EUR)</th>
<th>EBRD Signed Date</th>
<th>Success Status</th>
<th>Consultant Name</th>
<th>Consultant Nationality</th>
<th>Selection Adviser</th>
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<tbody>
<tr>
<td>39051</td>
<td>Kyrgyz Republic: Talas Water and Wastewater - PIU Support including</td>
<td>Kyrgyz Republic</td>
<td>490,005.00</td>
<td>07/02/2014</td>
<td>Winner</td>
<td>SVECO HYDROPROJEKT AS</td>
<td>CZECH REPUBLIC</td>
<td>Jenny Scheffel</td>
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<tr>
<td></td>
<td>Engineering, Design and Contracts Supervision</td>
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<td>KEYSTONE ENGINEERING SE</td>
<td>CZECH REPUBLIC</td>
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</tr>
<tr>
<td>39949</td>
<td>Kyrgyz Water and Wastewater Framework - Kant Water Project - City</td>
<td>Kyrgyz Republic</td>
<td>160,000.00</td>
<td>07/02/2014</td>
<td>Winner</td>
<td>THE INSTITUTE FOR URBAN ECONOMICS LLC</td>
<td>RUSSIAN FEDERATION</td>
<td>Larissa Gosling</td>
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<tr>
<td></td>
<td>and Company Support</td>
<td></td>
<td></td>
<td></td>
<td>Short Listed</td>
<td>CAI CONSULTING</td>
<td>KYRGYZ REPUBLIC</td>
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<td>Short Listed</td>
<td>CORPORATE SOLUTIONS CONSULTING LIMITED</td>
<td>UNITED KINGDOM</td>
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<td></td>
<td>Short Listed</td>
<td>FICHTNER GMBH &amp; CO KG</td>
<td>GERMANY</td>
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<td>Short Listed</td>
<td>GMCS-PRAHA SRO</td>
<td>CZECH REPUBLIC</td>
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<td>Short Listed</td>
<td>SEURECA</td>
<td>FRANCE</td>
<td></td>
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<tr>
<td>39822</td>
<td>Tajikistan: Khujand Wastewater Rehabilitation Project (Phase III)</td>
<td>Tajikistan</td>
<td>135,000.00</td>
<td>06/01/2014</td>
<td>Winner</td>
<td>HOLINGER IC INTERNATIONAL CONSULTANTS</td>
<td>SWITZERLAND</td>
<td>Jenny Scheffel</td>
</tr>
<tr>
<td></td>
<td>- Technical, Financial and Environmental and Social Due Diligence</td>
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<td></td>
<td></td>
<td>Short Listed</td>
<td>ERNST BASLER + PARTNER LTD</td>
<td>SWITZERLAND</td>
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<td></td>
<td>Short Listed</td>
<td>FICHTNER GMBH &amp; CO KG</td>
<td>GERMANY</td>
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<td></td>
<td></td>
<td></td>
<td>Short Listed</td>
<td>GEA ENGINEERING PC</td>
<td>UNITED STATES</td>
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<td></td>
<td></td>
<td>Short Listed</td>
<td>GRONTML - CARL BRO AS</td>
<td>DENMARK</td>
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</tbody>
</table>
Albert Einstein:

“Not everything that counts can be counted and not everything that can be counted counts”
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Min. Acceptable Threshold (% of max.)</th>
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</thead>
<tbody>
<tr>
<td>1. Specific experience and capability of the consultant firm(s) related to the assignment:</td>
<td>5</td>
<td>-</td>
</tr>
<tr>
<td>- experience in similar assignments - 60%</td>
<td></td>
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<tr>
<td>- experience in similar locations - 20%</td>
<td></td>
<td></td>
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<tr>
<td>- structure, organisation, capacity of firm - 20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Adequacy of the proposed work plan and methodology in responding to the TOR:</td>
<td>30</td>
<td>70</td>
</tr>
<tr>
<td>- understanding of assignment – 20%</td>
<td></td>
<td></td>
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<tr>
<td>- approach and methodology – 30%</td>
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<tr>
<td>- work plan and team assignments – 50%</td>
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<tr>
<td>3. Qualifications and competence of the key personnel for the assignment:</td>
<td>45</td>
<td>70</td>
</tr>
<tr>
<td>- Key Expert No 1: Project Manager – 50%</td>
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<td></td>
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<tr>
<td>- Key Experts No 2: Training Expert 1 – 25%</td>
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<td></td>
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<tr>
<td>- Key Experts No 3: Training Expert 2 – 25%</td>
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<td></td>
</tr>
<tr>
<td>Each of the key personnel listed above will be evaluated as follows:</td>
<td></td>
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<tr>
<td>- general qualifications – 10%</td>
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<tr>
<td>- specific experience and expertise related to the their task - 60%</td>
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<td></td>
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<tr>
<td>- experience in region – 10%</td>
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<tr>
<td>- Fluency in Russian – 20%</td>
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<tr>
<td>4. Other factors</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>- Interviews</td>
<td></td>
<td></td>
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<tr>
<td>TOTAL</td>
<td>100</td>
<td>70</td>
</tr>
<tr>
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<td>Weight</td>
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<tr>
<td>------------------------------------------------------------------------</td>
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<td>-------------------------------------</td>
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<tr>
<td>1. Specific experience and capability of the consultant firm(s) related to the assignment:</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>• experience in similar assignments - 60% (3%)</td>
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<tr>
<td>• experience in similar locations - 20% (1%)</td>
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<td></td>
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<tr>
<td>• structure, organisation, capacity of firm - 20% (1%)</td>
<td></td>
<td></td>
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<tr>
<td>2. Adequacy of the proposed work plan and methodology in responding to the TOR:</td>
<td>30</td>
<td>70</td>
</tr>
<tr>
<td>• understanding of assignment – 20% (6%)</td>
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<tr>
<td>• approach and methodology – 30% (9%)</td>
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<td></td>
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<tr>
<td>• work plan and team assignments – 50% (15%)</td>
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<tr>
<td>3. Qualifications and competence of the key personnel for the assignment:</td>
<td>45</td>
<td>70</td>
</tr>
<tr>
<td>• Key Expert No 1: Project Manager – 50% (22.5%)</td>
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<tr>
<td>• Key Experts No 2: Training Expert 1 – 25% (11.5%)</td>
<td></td>
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<tr>
<td>• Key Experts No 3: Training Expert 2 – 25% (11.5%)</td>
<td></td>
<td></td>
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<td>Each of the key personnel listed above will be evaluated as follows:</td>
<td></td>
<td></td>
</tr>
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<td>• specific experience and expertise related to their task - 60%</td>
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<td>• experience in region – 10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Fluency in Russian – 20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Other factors</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>• Interviews</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>100</td>
<td>70</td>
</tr>
</tbody>
</table>
Define input of key experts!

Team Composition, Assignment and Key Experts’ inputs

<table>
<thead>
<tr>
<th>No</th>
<th>Name</th>
<th>Position</th>
<th>D-1 (Home)</th>
<th>D-2 (Field)</th>
<th>D-3</th>
<th>...</th>
<th>D...</th>
<th>Total time-input (in Months)</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>KEY EXPERTS</td>
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<td></td>
</tr>
<tr>
<td>K-1</td>
<td>Mr. AAAAA</td>
<td>Team Leader</td>
<td>[2 months]</td>
<td>[1.0]</td>
<td>[1.0]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K-2</td>
<td></td>
<td>Field</td>
<td>[0.3 m]</td>
<td>[2.5]</td>
<td>[0]</td>
<td></td>
<td></td>
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<tr>
<td>K-3</td>
<td></td>
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</tr>
<tr>
<td>NON KEY EXPERTS</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N-1</td>
<td></td>
<td>Field</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N-2</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Subtotal

Total

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” – Consider complexity of assignment
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”? 

“Be kind to evaluators” – Who evaluates?
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

<table>
<thead>
<tr>
<th>Reference No.</th>
<th>Assignment Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Firm</td>
<td>Country</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------</td>
</tr>
</tbody>
</table>

**Detailed Description of Assignment**

1) **Background**
2) **Overall Objectives**
3) **Results/Outcome**

**Consulting Services Provided**

1) **Key Tasks per Objective**
2) **Activities per Key Tasks**
3) **Deliverables/Outputs**
“Be kind to evaluators” – Example for describing experts’ experience

<table>
<thead>
<tr>
<th>Assignment Title:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration: (m/year) to (m/year)</td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
<tr>
<td>Company/Client/Donor:</td>
<td></td>
</tr>
<tr>
<td>Expert's Position/Job Title:</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>Relevant Responsibilities/Tasks</td>
</tr>
<tr>
<td></td>
<td>Relevant Activities</td>
</tr>
<tr>
<td></td>
<td>Relevant Deliverables/Outputs</td>
</tr>
</tbody>
</table>
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)
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)**

<table>
<thead>
<tr>
<th>Contract Size (€M)</th>
<th>Works</th>
<th>Supply &amp; Installation</th>
<th>Goods</th>
<th>Consultant Services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0~0.3</td>
<td>5</td>
<td>2</td>
<td>46</td>
<td>18</td>
<td>71</td>
</tr>
<tr>
<td>0.3~7.5</td>
<td>54</td>
<td>11</td>
<td>35</td>
<td>5</td>
<td>105</td>
</tr>
<tr>
<td>&gt;7.5</td>
<td>18</td>
<td>10</td>
<td>6</td>
<td>0</td>
<td>34</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>77</td>
<td>23</td>
<td>87</td>
<td>23</td>
<td>210</td>
</tr>
</tbody>
</table>

| 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!

Work with us:
• Project finance
• Procurement (see next!)
• Trade Facilitation etc.

EBRD investments in SEMED hit €1.5 billion

What's new

Our investments in the southern and eastern Mediterranean have now reached the milestone of €1.5 billion.

The funds contribute to the development of the private sector and open market economy in Egypt, Jordan, Morocco and Tunisia.
Opportunities for suppliers & contractors? Research ebrd.com!

Working with the EBRD

There are a number of ways you can work with the European Bank for Reconstruction and Development (EBRD) as well as its clients and partner organisations. We offer a range of products and business services. Our operations extend across more than 30 countries and within a broad range of industry sectors.

Project finance
We offer a number of financial instruments, primarily in the form of loans, equity and guarantees.

Procurement
Projects financed by the EBRD generate goods and services for internal projects and departments.

Project procurement (see next!)
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.

Project Procurement
Our clients need goods, public works, associated services and experts across various sectors right across the countries where the EBRD works.

Consultancy Services
Selection and engagement of consultants for the needs of the Bank and 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

### Procurement notices

<table>
<thead>
<tr>
<th>Issue Date</th>
<th>Closing Date</th>
<th>Country</th>
<th>Project Name</th>
<th>Sector</th>
<th>Contract</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>27 Aug 2015</td>
<td>27 Aug 2016</td>
<td>Romania</td>
<td><strong>Brasov Urban Transport Project - Extension</strong></td>
<td>Municipal and environmental infrastructure</td>
<td>Project goods, works and services</td>
<td>General Procurement notices</td>
</tr>
<tr>
<td>26 Aug 2015</td>
<td>12 Oct 2015</td>
<td>Kyrgyz Republic</td>
<td><strong>Bishkek Solid Waste Project</strong></td>
<td>Municipal and environmental infrastructure</td>
<td>Project goods, works and services</td>
<td>Invitation for tenders</td>
</tr>
<tr>
<td>26 Aug 2015</td>
<td>16 Oct 2015</td>
<td>Kyrgyz Republic</td>
<td><strong>Kant Water Project</strong></td>
<td>Municipal and environmental infrastructure</td>
<td>Project goods, works and services</td>
<td>Invitation for tenders</td>
</tr>
<tr>
<td>26 Aug 2015</td>
<td>15 Oct 2015</td>
<td>Kyrgyz Republic</td>
<td><strong>Kant Water Project</strong></td>
<td>Municipal and environmental infrastructure</td>
<td>Project goods, works and services</td>
<td>Invitation for tenders</td>
</tr>
</tbody>
</table>
Goods & works? Do your research!

Business opportunities

Current Notices
List of prequalified Tenderers and Shortlisted Consultants
Contract Awards Notification
Contract Pipeline
List of entities and individuals which are ineligible to become an EBRD Counterparty

Learn more about Project Procurement

Procurement Policies and Rules and Related Bank Policies
Integrity and Compliance
Standard Procurement Documents and Guidance Notes
Reports
Making a Project Procurement Complaint
Procurement Policy Department Initiatives
The EBRD’s Procurement Policies and Rules (PP&R):
Procurement of goods and works
EBRD’s Procurement Policies & Rules (PP&R) – Goods & works

EBRD PP&R

Section 1: Introduction

Section 2: Principles and Considerations

Procurement of GOODS & WORKS

Section 3: Procurement Rules for Public Sector Operations

Open competitive tender

Section 4: Procurement Rules for Private Sector Operations

Follow normal commercial practices

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.
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)
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

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