

CORPORATE PROCUREMENT
POLICY SUMMARY

For Vendors Doing Business with the World Bank Group



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1. Introduction

This Corporate Procurement Policy Summary has been prepared to assist the Vendor community in understanding how to do business with the World Bank Group (“World Bank Group”).

The World Bank Group is one of the largest providers of financial and technical assistance to developing countries around the world.

It is made up of five international organizations headquartered in Washington, D.C., with country offices worldwide. The World Bank Group includes the International Bank for Reconstruction and Development (IBRD), the International Development Association (IDA), the International Finance Corporation (IFC), the Multilateral Investment Guarantee Agency (MIGA) and the International Centre for Settlement of Investment Disputes (ICSID). The largest member of the World Bank Group is IBRD/IDA, more commonly known as the World Bank Group.

2. World Bank Group Corporate Procurement Unit

The World Bank Group spends nearly two billion dollars annually for goods, services, works and consulting services for its own requirements and for requirements of donor trust funds that go to support the World Bank Group’s lending operations. Most of the World Bank Group’s procurement is handled directly by the Corporate Procurement Unit (“Corporate Procurement”).

The goal of Corporate Procurement is to obtain the best overall value for the World Bank Group through sound business and procurement decisions representing good value for money in a process that is fair and transparent. Corporate Procurement works with risk partners to set out steps to assess, mitigate, and monitor risks that arise out of contractual relationships with Vendors. Depending on the needs of the World Bank Group, Corporate Procurement formally solicits bids and proposals from Vendors, or in the case of small purchases, issues purchase orders without formal competition.

The World Bank Group’s procurement process reflects its commitment to sustainability through environmental, social and inclusive sourcing. The World Bank Group has established directives and procedures that govern all procurements made for, or on behalf of, the World Bank Group.

3. Authorities

Corporate Procurement sets policies, procedures, and standards designed to provide an appropriate balance between the institutional requirements and the needs of the business managers.

Corporate Procurement staff have the delegated authority to sign on behalf of the World Bank Group contracts, purchase orders, agreements and other instruments associated with the purchase, sale or disposal of goods, services (including works) and consulting services.

No work may be commenced, nor goods supplied by a Vendor before the Vendor is registered and provided with an official World Bank Group Purchase Order or Contract. Any commencement of work, service or goods provided by a Vendor prior to the issuance of a World Bank Group authorized Purchase Order or Contract will be at the Vendor’s own risk.

4. Vendor Registration

Prospective Vendors must submit registration applications through the WBeProcure Supplier Self-Registration (SSR) process to be eligible to participate in World Bank Group business opportunities. World Bank Group Staff may invite prospective Vendors to submit registration applications, or prospective Vendors may submit spontaneous registration applications without prior invitation.

Only registered Vendors can be awarded a World Bank Group contract. Completion of a Vendor registration application does not guarantee registration as a World Bank Group Vendor. To become a registered World Bank Group Vendor, **you must** meet all Vendor eligibility requirements (detailed below) and provide any required supporting documentation. Corporate Procurement reviews whether Vendors meet the Vendor eligibility requirements only where a need for specified Vendor goods/services has been defined by the World Bank Group. Vendors that have successfully completed the registration process will receive a notification from the World Bank Group with their Vendor Identification Number (VIN).

World Bank Group Vendors comprise of Businesses and Sole Proprietors/Independent Contractors, which the World Bank Group defines as follows:

- a. A Business is an organization that has been incorporated, or registered as a company (corporation, company/limited, partnership) that has been established to offer goods and/or services for profit. An organization registered as “not-for profit” (e.g., university, hospital, NGO, and UN Agency) are also considered a business.
- b. A Sole Proprietor/ Independent Contractor is a person engaged in a business as either a ‘self-employed individual’ (an individual in business for himself or herself and is self- employed), or as a ‘sole proprietor’ (an individual in business for himself or herself and who is the only owner of the unincorporated trade or business).

5. Vendor Eligibility

The World Bank Group’s policies, standards and procedures for determining whether a Vendor is excluded, either permanently or for a specific period of time, from receiving Contract awards from the World Bank Group are found in the World Bank Group Vendor Eligibility Policy posted on the World Bank Group’s website at <https://www.worldbank.org/vendorskiosk>.

Vendor applications are reviewed against the following Vendor Eligibility Criteria:

- a. The Vendor can demonstrate that it has been and is offering goods/services under the business name for a period not less than one year.
- b. The Vendor has multiple business clients and the financial capacity to provide the goods and/or services. The financial capacity will be assessed by comparing the Vendor’s revenues to the value of the proposed contract(s).
- c. The Vendor can legally conduct business in the country/countries for which it is registering and where work is to be performed, or goods delivered.
- d. Consistent with the World Bank Group’s policy on anti-money laundering/combating the financing of terrorists, companies listed on the UN 1267 sanctions list are ineligible to be World Bank Group Vendors and to receive World Bank Group contract awards. Vendor sanctions screening includes owners, officers, beneficial owners (25% or more of control), politically exposed persons (PEP), and

third parties (consultants, agents, subcontractors) of World Bank Group, Multilateral Development Banks and other sanctions lists.

- e. Ineligibility due to integrity risks identified by Integrity Due Diligence (IDD) based on the IDD Procedure for Finance, Administrative and Corporate Activities. Vendor IDD screening includes owners, officers, beneficial owners (25% or more of control), politically exposed persons (PEP), and third parties (consultants, agents, subcontractors) and extends to, among other things, negative news (criminal activities and civil proceedings), and political influence.
- f. Consistent with the World Bank Group's policy, Vendors debarred from contracting with the World Bank Group as Non-Responsible Vendors (see <https://www.worldbank.org/en/about/corporate-procurement/business-opportunities/nonresponsible-vendors>), or entities included on the World Bank Group Listing of Ineligible Firms (<https://www.worldbank.org/en/projects-operations/procurement/debarred-firms>) are also ineligible to be World Bank Group Vendors and/or receive World Bank Group contract awards.

World Bank Group Policy Restrictions Related to Current and Former World Bank Group Staff and their Close Relatives

- a. The World Bank Group's policies apply to current and former World Bank Group staff, including but not limited to Short Term Consultant (STC), Short Term Temporary (STT), Extended Term Consultant (ETC), Extended Term Temporary (ETT), Local Staff, Regular, Open-Ended, Term, Executive Director Advisor and Special Assignment appointments. These policies provide certain restrictions related to Vendor eligibility and the eligibility of current and former World Bank Group staff from performing services for the World Bank Group. Vendors are required to notify the World Bank Group of any current or former World Bank Group staff that they are proposing to provide services under a contract with the World Bank Group.
- b. Current or former World Bank Group staff are ineligible to be World Bank Group Vendors or subcontractors to World Bank Group Vendors, whether as sole proprietors or independent contractors, during their appointment and for a period of twelve months ("Cooling Off Period") from the termination date of their World Bank Group appointment. In addition, this Cooling Off Period applies to companies in which a current or former World Bank Group staff member is an owner, principal, director, or officer, or holds a financial interest. The Cooling Off Period also applies to companies with which close relatives (spouses/domestic partners, parents, full and half siblings, children, aunts, nieces, and nephews) of current or former World Bank Group staff are owners, principals, directors, or officers, or hold a financial interest. In the context of the Cooling Off Period, "financial interest" does not include negligible stock holdings in entities listed on the S&P Global 1200.
- c. The World Bank Group also imposes a restriction on all current and former World Bank Group staff that for two years after termination of service with the World Bank Group, they may not seek or accept work for other entities or persons related to activities where the World Bank Group has an interest or is a party and where they had direct involvement during their World Bank Group service, except with the World Bank Group's prior written consent. In addition, World Bank Group policies restrict close relatives of World Bank Group staff from being hired either directly or through its suppliers.
- d. Vendors are required to notify Corporate Procurement of any real or perceived conflicts of interest, including affiliations with current or former World Bank Group staff and their close relatives.

Once a Vendor is approved and deemed responsible, it is added to the World Bank Group's Vendor Master File as a "Registered Vendor". Registered Vendors will be expected to maintain and update their Vendor Registration file at least every two years and advise the World Bank Group of any significant business changes, including beneficial owners and subcontracting relationships relating to a World Bank Group

contract. Registered Vendors may be asked to submit updated and/or provide additional information that may be used in determining the Vendor's ability to participate in specific requests for proposals for major procurements, where additional qualification criteria, specific to the requirement, have been determined.

The World Bank Group, at its sole discretion, reserves the right to remove a Vendor from the Master File. Reasons for removing a Vendor from the Master File could include but not limited to:

- a. Vendor no longer meets the Vendor Eligibility Criteria
- b. Vendor Master File is inactive, or information is out of date
- c. Vendor's unsatisfactory performance under a World Bank Group contract

Only responsible Vendors are eligible to receive World Bank Group contracts. Vendors found to be not responsible may be terminated/excluded from current and future contract awards.

6. Business Ethics

The World Bank Group's procurement activities are conducted in a manner above reproach, with complete impartiality and with no preferential treatment. World Bank Group staff will not solicit or accept, directly or indirectly, any gratuity, gift, favor, entertainment, loan, or anything of monetary value from anyone who: (a) has or is seeking to obtain World Bank Group business; or (b) has interests that may be substantially affected by a procurement award.

The World Bank Group's Vendors and their employees are expected to abide by the highest ethical, legal and moral standards in all business relationships. As such, all Vendors are obliged to respect the World Bank Group's policy and refrain from placing Bank staff in an ethical dilemma by offering entertainment, hospitality or gifts.

7. Vendor Integrity Policies

Vendors must comply with the following integrity documents, available on the World Bank Group's website (<https://www.worldbank.org/vendorkiosk>):

- i. Vendor Eligibility Policy
- ii. Vendors Code of Conduct
- iii. Restrictions on Current and Former WB staff
- iv. Code of Conduct for On-site Vendor Employees
- v. Information Security Requirements for Contractors
- vi. Security, Fire and Safety Regulations for WB Onsite Vendor Employees

Vendors are responsible for monitoring the World Bank Group website:

<https://www.worldbank.org/corporateprocurement> in order to stay abreast of compliance requirements and changes to, or the introduction of, applicable policies.

8. Source Selection

The World Bank Group promotes open competition through its procurement process using a variety of traditional solicitation tools such as Request for Quotation (RFQ), Invitation for Bid (IFB), Request for Proposal (RFP), etc.

The World Bank Group uses both manual and electronic tools for solicitations. Electronic tools include email, secured fax, and other e-tendering solutions. Electronic commerce with suppliers significantly enables efficiency and reduction in transaction costs. Corporate Procurement will automate the procurement process — particularly from order placement to disposal — as much as possible. Inherent in this principle is an expectation that World Bank Group suppliers will become capable of conducting business electronically. New suppliers will be enabled by electronic requirements, purchase order, and invoice and payment processes whenever an electronic business solution is available.

The World Bank Group's contract terms and conditions are posted on the World Bank Group's website at <https://www.worldbank.org/vendorkiosk>. It is the Vendor's responsibility to review the terms and conditions prior to bidding, accepting an order, rendering services or shipping goods to the World Bank Group.

9. Solicitation Process

Best Value

The World Bank Group bases procurement decisions on best value, defined as the outcome that provides the optimal combination of elements such as lowest total cost of ownership; technology, innovation and efficiency; assurance of supply; quality; and other factors relative to the World Bank Group's needs. Solicitation Procedures and Types.

The Procurement Officer prepares and distributes, by invitation or advertisement, a solicitation to prospective Vendors. The solicitation may include, based on the goods and services being acquired, specifications, an SOW, a TOR, or a Performance Work Statement (PWS), price sheet, questionnaire, proposed contract terms and conditions, evaluation criteria, and any other necessary information. Solicitations may require respondents to submit financial statements for the previous two years, so that respondents' financial status/stability can be determined. All requirements must be clearly stated in the body of the solicitation, and all must be specifically addressed by the bidder/offeror in their bid/proposal, or the bid/proposal may be deemed as not responsive.

Business Opportunities

World Bank Group procurements are open to competition from Vendors in all countries, subject to the competitors being eligible and legally able to conduct business in the country of performance/delivery. Opportunities may be by invitation to a sufficient number of Vendors to ensure adequate competition, or through advertisement on the World Bank Group's website at <https://www.worldbank.org/en/about/corporate-procurement/businessopportunities>, in local newspapers or in periodicals. Advertisement might not always be appropriate taking into consideration the various market and local conditions the World Bank Group operates in, or risks involved by advertising proprietary information.

Exceptions to Competition

It is the World Bank Group's policy to procure goods or services through a competitive process to the maximum extent possible. However, instances arise when a noncompetitive procurement selection is justified.

10. Bids and Proposals

Submission of quotations/bids/proposals is to be in accordance with the instructions contained in the solicitation document. The World Bank Group at its sole discretion reserves the right to reject any quotation, bid or proposal without recourse. Quotations/bids/proposals may be rejected for the following reasons:

- a. Quotations/bids/proposals were received past the due date and time as specified in the solicitation document.
- b. The Procurement Officer determines the total quotation/bid/proposal price or prices for individual line items to be unreasonable or unbalanced.
- c. When a bid guarantee is required, and the bidder fails to furnish the guarantee in accordance with the bid requirements.
- d. Quotations/bids/proposals received are not responsive to the content of the solicitation.
- e. The solicitation has been cancelled for World Bank Group business reasons.

The World Bank Group, at its sole discretion, reserves the right to request substantiation or clarification for any or all information received, and to ask for interviews with the management staff of bidders/offerors when necessary.

The World Bank Group, at its sole discretion, reserves the right to cancel a solicitation without recourse, at any time during the solicitation and evaluation process and prior to contract award.

11. Socially Responsible Procurement

As a socially responsible organization, the World Bank Group, through its corporate procurement practices, endeavors to integrate socially responsible suppliers into its supply chain. To this end, for contracts where labor services are provided directly to the World Bank Group, World Bank Group procurement policy addresses supplier activities under the categories of wages and benefits, health and safety, inclusive sourcing, and accessibility (equipment and facilities).

Wages and Benefits, Health and Safety

World Bank Group solicitations and contracts that include labor services will specify measures to be implemented to address service employees' wages and their health and welfare benefits, and will also specify criteria that address the need for contractors to provide their service employees with safe working conditions and fair and equitable work practices.

The World Bank Group's policy on socially responsible procurement will be reflected in solicitations for the provision of labor services as determined appropriate by Corporate Procurement. If appropriate, applicable evaluation criteria will be included in the technical evaluation and considered in the cost analysis of all quotations, bids, and proposals received in determining the successful bidders or offerors.

Inclusive Sourcing

Inclusive sourcing for the World Bank Group will provide opportunities for underrepresented business enterprises. The objectives of Corporate Procurement's inclusive sourcing initiative are to increase economic impact by the World Bank Group in the countries we operate in by increasing participation of businesses owned by underrepresented communities, both by direct contracting and by working with World

Bank Group prime contractors (first-tier Vendors) to expand their subcontracting of World Bank Group related business to these vendor firms, ensuring a more resilient and innovative supply chain.

12. Environmentally Responsible Procurement

To increase the development and awareness of environmentally responsible procurement (ERP), the acquisitions of goods and services will ensure that, wherever possible, specifications are written to provide for the expanded use of environmentally preferred products such as: durable products, reusable products, energy-efficient products, low-pollution products, products (including those used in services) that contain the maximum level of post-consumer waste and/or recyclable content, and products that in any other way have a minimal harmful impact on the environment.

The World Bank Group's policy on Environmentally Responsible Procurement will be reflected in solicitations issued by Corporate Procurement as determined appropriate by Corporate Procurement. Applicable evaluation criteria will be included in the technical evaluation and considered in the cost analysis of all quotations, bids, and proposals received in determining the successful bidders/offerors.

It is recognized that cost analysis is required to ensure that the products are made available at competitive prices, and that the environmental benefits provided by a product or service do not undermine its overall performance. Given that many environmentally preferred products and services can produce a variety of tangible benefits, full consideration should be given to the long-term and complete costs and benefits of environmentally responsible procurement.

13. Contract Award

Basis for Award

Following a selection process, the Vendor is selected in accordance with the basis for the award as specified in the solicitation, and as described below:

- a. A Procurement Officer determines whether the Vendor selected for award is responsible. A responsible Vendor is defined as one with the operational capacity, capability, and willingness to successfully complete the contract. In making this determination, the Procurement Officer considers various elements including service and Vendor risks and mitigations, financial stability, financial ratios, the location and operating capacity of the Vendor's plant and personnel, and the effect of other financial and resource commitments, as well as the Vendor's experience, past performance, and history of adherence to ethical business practices.
- b. A Procurement Officer determines, based on reasonable knowledge of the commodity and market conditions, that the price quote/offer is fair, reasonable, and balanced. Reasonable pricing will be determined by comparison of the proposed bid/proposal price with recent previous purchases; current price lists; catalogues; advertisements; and similar industry benchmarks.

Notice of Award

The selected bidder/offeror will receive notice of the award, and the World Bank Group contract will be issued in accordance with the solicitation requirements. Subject to the exceptions of the respective information disclosure policies, for any contract award valued at and over US \$250,000, the World Bank Group will publicly disclose contract award information – specifically, the name of the Vendor receiving the award, a brief description of the contract goods or services, and the contract award amount. Vendor's proposal and contractual documents will remain confidential and therefore not subject to disclosure.

Contracting Instruments

World Bank Group purchase obligations are executed in the form of written agreements that establish binding legal relationships obligating the Vendor/contractor to furnish goods, works, services, or data and obligating the World Bank Group to pay for them. Examples of contracting instruments used by the World Bank Group are as follows:

- a. Purchase Orders: a template form contract that is issued subject to the World Bank Group's commodity specific General Terms and Conditions available online at www.worldbank.org/corporateprocurement/.
- b. Contracts: written commitments between the World Bank Group and Vendors based on a set of agreed upon terms and conditions.

Acceptance

The acceptance of the contract or purchase order by the Vendor is the Vendor's consent to proceed with performance. The World Bank Group's regulations do not permit oral contracts; therefore, Vendors are not permitted to proceed with deliveries or begin work before the issuance of a written electronically transmitted World Bank Group-authorized contract or purchase order. Furthermore, all contract changes or modifications must be in writing and fully executed by both parties.

14. Award Debriefing and Protest Procedures

Award Debriefing and Protests procedures are available only to offerors/bidders who participated in a World Bank Group competitive solicitation and who were not awarded a purchase order or contract. Award Debriefing and Award Protest procedures are not available to Vendors who did not participate in the solicitation; non-responsive or late offerors/bidders; or when the solicitation was cancelled by World Bank Group.

Debriefing Procedures

The World Bank Group does not routinely debrief unsuccessful offerors. However, in the case of highly technical or complex awards, a debriefing may be conducted upon written request from an unsuccessful offeror. The scope of the debriefing is to identify the technical deficiencies or weaknesses of the offeror's proposal. Debriefings do not discuss the following:

- a. Trade secrets or other proprietary information including the methodology or approach of other offerors;
- b. Financial or cost information about other offerors;
- c. Evaluation scoring or the ranking of the offerors; or
- d. Other offerors' proposals.

Protest Procedures

The World Bank Group's response to all protests, regardless of who they are addressed to, is always prepared and executed by Corporate Procurement. An unsuccessful offeror/bidder that wishes to submit a protest must inform the Chief, Corporate Procurement in writing to explain the basis of the protest within 10 business days (the "Notice Period") of the World Bank Group's issuance of the solicitation, addendum, notice of award or other action of the World Bank Group related to the solicitation. Protest notifications must include the following information:

- a. The protestor's name, address, telephone number, fax number, and email address
- b. The World Bank Group solicitation number
- c. A detailed statement of all factual and legal grounds for the protest and an explanation of how the protestor was prejudiced
- d. Copies or relevant documents supporting the protestor's statement

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

Upon receipt of a written protest from an unsuccessful bidder/offeror, the Chief, Corporate Procurement does the following:

- a. Provides the protestor with a written acknowledgement;
- b. Initiates a review of the protestor's allegations; and
- c. Following the conclusion of the review, provides the protestor with formal written notification of the decision and the basis upon which it was made.

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

15. Contract Administration

The World Bank Group Contract Manager has the responsibility to monitor contractor performance through meetings, reports, and inspection in order to ensure contract compliance. The Contract Manager must also require deliverables for all services and document contractor performance.

Contract changes become effective only after a written contract modification or change order has been issued by the Procurement Officer and executed by the Vendor.

Payment to Vendors

Vendors shall promptly submit invoices to the World Bank Group in accordance with the instructions in the contract. Upon receipt of proper invoices, the World Bank Group will pay Vendors at the prices/rates stipulated in the contract, for goods delivered and accepted or services delivered or rendered and accepted, minus any deductions or discounts provided for in the contract. The World Bank Group's standard payment terms are Net 30 (payment within 30 days of receipt of an accurate invoice). Should a Vendor be interested in a prompt invoice payment and are willing to offer a prompt payment discount, they should contact Corporate Procurement to discuss. The World Bank Group operates a Purchasing Card (PCard) and Event Card programs which allow authorized card holders to purchase low-dollar-value goods and services for World Bank Group business use.

Any questions regarding the Corporate Procurement Policy Summary should be directed to CorporateProcurement@worldbank.org.