Global Vendor Forum for Women-Owned Businesses

Accessing Consulting Opportunities for WBG Operational Activities
House-keeping Instructions and Agenda Overview

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Chief of Corporate Procurement
Welcome and Opening Remarks

Shaolin Yang
Managing Director and WBG Chief Administrative Officer
Advancing Gender Equality and Women’s Economic Empowerment

Andrea Kucey
Manager, WBG Gender Group
Round-table: Promoting Supplier Diversity and Inclusion at the WBG

Enzo De Laurentiis
Chief Procurement Officer, WB Operations Policy & Country Services

Heather Mae Kipnis
Global Product Lead, IFC Gender and Economic Inclusion Group

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Head of Secretariat & ESG, WBG Corporate Procurement

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Doing Business with the World Bank Group

Overview of WBG Corporate Procurement

Lily Cheung
Sr. Procurement Specialist
World Bank Group (WBG)

- **IBRD**: International Bank for Reconstruction and Development. Assists middle-income and creditworthy countries.
- **IDA**: International Development Association. Focuses on the world’s poorest countries.
- **IFC**: International Finance Corporation. Promotes private investment in developing countries.
- **ICSID**: International Centre for Settlement of Investment Disputes. Settles disputes with private enterprises.

**Partnering with Governments**

**Partnering with the Private Sector**
In Corporate Procurement we recognize... That every purchase we make is a vehicle for change that supports the World Bank Group’s priorities.
Core principles

- Fair, open and transparent selection process
- Obtain best overall value
- Give all eligible (qualified) bidders the opportunity to compete
- Promote sustainable procurement that is inclusive
Corporate Procurement is responsible for coordinating and managing the sourcing strategy, selection, and contract execution for goods and services for World Bank Group offices in over 140 countries around the globe, overseeing an annual global spend between USD 1.5 and 2 billion with 24,000+ vendors.
Advise and guide Bank Group staff on procurement matters in order to provide an appropriate balance between institutional requirements and business needs.

Manage systems and tools that support a streamlined procurement process.

Leverage category management concepts and recommend procurement strategies to clients that are reflective of market conditions.

Oversee and/or conduct all administrative and operational consulting procurements to support the WBG ongoing business operations.
Our Spend in Fiscal Year 2022

- 29% Corporate Services & Real Estate
- 26% Professional Services
- 21% Human Resources
- 18% Information Technology
- 3% Financial Services
- 3% Others
## What we buy

<table>
<thead>
<tr>
<th>Corporate Services &amp; Real Estate</th>
<th>Human Resources &amp; Professional Services</th>
<th>Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction and Renovation</td>
<td>Operational Consulting</td>
<td>IT Compute Infrastructure</td>
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<tr>
<td>Facilities Management</td>
<td>Management Consulting</td>
<td>Telecom and Network</td>
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<tr>
<td>Security Services</td>
<td>Training and Coaching</td>
<td>Office Productivity Software &amp; Hardware</td>
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<tr>
<td>Travel</td>
<td>Global Payments</td>
<td>Business Applications (Fintech, HR, General Services)</td>
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<tr>
<td>Health Services</td>
<td>Audit and Accounting Services</td>
<td>IT Software (General/Enterprise Software, Security, Data Analytics, Application Mgt)</td>
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<tr>
<td>Corporate Services</td>
<td>Insurance and Brokerage</td>
<td>Bank Operations ICT Solutions</td>
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<tr>
<td>Food, Conference &amp; Events Services</td>
<td>Health and Compensation Benefits</td>
<td>Disruptive Technologies</td>
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<td>Executive Searches</td>
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<td>Labor and Staffing</td>
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**WORLD BANK GROUP**

Corporate Procurement
Development areas the WBG supports

- Equitable Growth, Finance and Institutions
  - Finance, Competitiveness, and Innovation
  - Governance
  - Macroeconomics, Trade and Investment
  - Poverty & Equity

- Human Development
  - Education
  - Gender
  - Health, Nutrition and Populations
  - Social Protection and Jobs

- Sustainable Development
  - Agriculture and Food
  - Climate Change
  - Environment, Natural Resources and Blue Economy
  - Social Sustainability and Inclusion
  - Urban, Disaster Risk Management, Resilience and Land
  - Water

- Infrastructure
  - Digital Development
  - Energy and Extractives
  - Infrastructure Finance, PPPs and Guarantees
  - Transport
Consulting services the WBG procures

- Advisory Services
- Analytical Work
- Assessments
- Capacity Building
- Knowledge Product Development
- Project Appraisals
- Research
- Survey and Data Collection
- Technical Assistance
Vendor Eligibility and Code of Conduct

Information is located at: https://www.worldbank.org/en/about/corporate-procurement/vendors

The World Bank Group’s procurement process is guided by the principles of transparency, fairness, competition, and best value. As a vendor you need to understand the policies and procedures that you must adhere to in order to do business with us.

All parties interested in conducting business with the World Bank Group must go through a Vendor Registration process where possible financial, conflict of interest and/or contractual risk considerations are reviewed and is confirmed that the firm conforms to the Vendor Eligibility Policy.

To become a new World Bank Group Registered Vendor, you must be invited to complete a Vendor Registration form, meet all eligibility requirements, and provide any required supporting documentation. Vendors that have been determined eligible, and that have successfully completed the registration process will receive a notification from the World Bank Group with their Vendor Identification Number (VIN).

Before qualifying to receive a contract or purchase order award from the World Bank Group, your company must be a registered World Bank Group vendor.

We recommend you take time to review all associated documents, especially those related to vendor eligibility.
Vendor eligibility criteria

- Minimum 1 year in business
- No more than 20% of revenue from WBG
- Acceptance of World Bank Group Terms & Conditions
- Multiple clients / customers
- Appropriate business licenses / certifications

You **do not** need to be an approved WBG vendor to bid on a requirement but **do** need to register as a potential supplier.

Before the World Bank Group can contract, the company must be approved as a WBG vendor.

If you are an approved vendor, you must provide updated information when your company has a material change.
Vendor application process

- Provide business information (name, location, entity type, date of incorporation, etc.)
- Disclose basic financial information (e.g., annual sales, annual revenue, etc.)
- Provide diversity information, including certifications, if applicable
- Enclose certificates of incorporation and any relevant documentation, as appropriate
- Agree to the World Bank Group General Terms and Conditions
Identifying business opportunities

Criteria and considerations for evaluation

- Experience of the firm in relation to the assignment
- Adequacy of the methodology and the proposed work plan
- Qualifications and competence of the key staff proposed
- Firms may compete as a single entity or in association with other partners

Note: The evaluation usually involves both a technical evaluation and consideration of the price offered for the services (quality and cost).
Best practice for preparing a proposal

- Attend pre-proposal conference – when applicable
- Ask questions up front – do NOT guess or assume
- Submit bids on time. Late bids are not accepted
- Do not vary from standard RFx forms
Preparing a proposal in response to a solicitation

- Make sure that your proposal is carefully prepared and easy to evaluate – use charts, diagrams, color
- Propose a strong Project Manager and qualified experts
- Address requirements of the Terms of Reference (TOR) / Statement of Work (SOW) clearly and comprehensively
- Emphasize innovative technical solutions
- Assess the competition. Compete where YOU are competitive
Disclosure of contract awards

Under the WBG information disclosure policies, certain Corporate Procurement contract awards are eligible for public disclosure with the following information on our website:

- The contract award amount
- A brief description of the contracted goods or services
- The name of the vendor receiving the award

What diverse suppliers can do

- Register as a potential supplier in the World Bank Group’s [WBGeProcure Supplier Registration portal](#).
- Record the Supplier Diversity designation during the registration indicating the diversity type and certifications.
- When responding to procurement opportunities, indicate any WBE, MBE, or other diversity qualifications.
- Register with relevant certification bodies such as [WEConnect](#), [WBENC](#), [NMSDC](#), [NGLCC](#), or others.
- Look for opportunities not just with the WBG but with [WBG existing suppliers](#).
Registering as a WBG Potential Supplier
Navigating the WBGeProcure Supplier Registration Portal

Afzal Timri Basha
Procurement Analyst
Accessing the Vendor Registration Portal

Invitation to Register: A WBG Staff sends out an invitation to the selected vendor, the vendor will receive two email notifications to register, one with the Login ID and the other with the password. Vendors use these credentials to access the application.

Spontaneous Registration: Vendors express their interest to be added to the WBG’s Supplier Database by clicking the “APPLY HERE” button. Spontaneous applications do not guarantee a company will become a registered WBG Vendor. However, suppliers will be added to the WBG Database for potential future business opportunities.

Click here for Spontaneous Registration Process

Use credentials received in the Invitation to Register
In the WBGeProcure Supplier Registration portal select ‘APPLY HERE’. Read the Privacy Notice, acknowledge agreement by selecting the “I agree to the above terms and conditions” checkbox and click ‘AGREE’.
Welcome Page

Read the Welcome message and click ‘Next’ to continue

Welcome to Supplier Self Registration (SSR)

Thank you for your interest in becoming a potential vendor for the World Bank Group (WBG). The supplier self-registration form should take approximately 10 minutes to complete. Before submitting your application, we recommend you review the Vendor Guide, Vendors Code of Conduct, Vendor Eligibility Policy and the Restrictions on Current and Former WBG Staff documents.

Suppliers need to register in the WBG Supplier Database to participate in a solicitation process; however, only suppliers which have been approved as WBG Vendors can be awarded a contract. By completing this application, you confirm that:
- Your company meets the WBG Vendor Eligibility Requirements.
- Your company and any subcontractors you propose or intend to propose as part of a solicitation understand the WBG Privileges and Immunities as stated in the General Terms and Conditions, including immunity from taxes. These Privileges and Immunities are applicable only to the WBG and do not apply to your company or subcontractors.
- You and your subcontractors have read and will comply with the Vendors Code of Conduct and the Code of Conduct for On-site Vendor Employees.
- No WBG staff member or their immediate family is an owner, officer, partner, or board member or has a financial interest in either your company or its subcontractors in accordance with the Restrictions on Current and Former WBG staff.

Once the application is complete you will be assigned a unique WBG application number. You may be required to provide this application number to a WBG representative upon request.
Complete the mandatory fields marked in red in page. Information should be provided only in English. Click Next to continue.

Provide legal name as it appears in the registration document.

Login ID will be added automatically as the contact email.
User Authentication

The system will send a temporary pin via email to authenticate the user. Enter the pin received and click Submit. The pin is valid for 3 minutes.
Select the category that best describes the goods or services your company provides and click Next. For example, in case of Consulting Services to support operational activities, select the category 90: Contract Consultants.
Certificate Overview

Upload relevant certifications (e.g., Certificate of Incorporation or other relevant registration documents) and click Next.
Complete the company information details, owners and officers, and declaration. Click Next.
Supplier Diversity Questionnaire

Confirm your company’s supplier diversity classification from the drop-down menu. Check the classification that applies and best describes your company and provide relevant documentation. Click Next.
Terms and Conditions

Acknowledge approval by clicking on ‘ACCEPT & SUBMIT’. This step completes the application submission.
A message confirming a successful submission appears; click on ‘LOGOUT’. An email confirmation with the application number will be sent automatically.
Finding and Responding to WBG Business Opportunities
Navigating the WBGeProcure RFx Now platform

Maha Zaqout
Procurement Specialist
Vendors and potential suppliers will log into the WBGeProcure RFx Now at https://wbgeprocure-rfxnow.worldbank.org/
To get started click on First Time User, enter the Username, which is the email address used to register in the WBGeProcure Supplier Registration portal. Click submit to get started. A temporary password will be emailed to the email addressed provided to validate credentials. If the validation is successful, a Login Code will be sent via email.
WBGeProcure RFx Now: Getting Started

Validate the credentials by entering the Login Code received via email and click the Submit button. If the two-factor validation is successful, you will be redirected to the dashboard.

If the validation fails, an error message will display. Verify your Username and Password and try again. If the problem persists, contact Corporate Procurement for support.
**Dashboard:** Upon successful Login users will be directed to the dashboard where a list of Active Procurements and All Procurements will be found. Active Procurements are those in which the user is currently participating, and All Procurements are those in which they have ever been involved.

<table>
<thead>
<tr>
<th>Procurement Number</th>
<th>Title</th>
<th>Started</th>
<th>Phase</th>
<th>Type</th>
<th>Method</th>
<th>Status</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000029</td>
<td>Test Vendor statuses fix</td>
<td>1/4/2023 4:10 PM EST</td>
<td>Award</td>
<td>Competitive</td>
<td>RFP</td>
<td>Active</td>
<td>Proposal Evaluation</td>
</tr>
<tr>
<td>0000000026</td>
<td>Test Mobile approval for multiple awards</td>
<td>12/22/2022 10:19 AM EST</td>
<td>RFP</td>
<td>Competitive</td>
<td>RFP</td>
<td>Active</td>
<td>Proposal Evaluation</td>
</tr>
</tbody>
</table>

- **Started:** Indicates the date and time when the procurement was initiated.
- **Phase:** Current phase of the procurement.
- **Type:** Indicates if the procurement is competitive or non-competitive.
- **Title:** Indicates the name of the project for which the procurement is being conducted.
WBGeProcure RFx Now: Getting Started

Main Menu: The dashboard contains a context-based navigation that includes Procurements, Advertisements, and Resources. It will also contain an Announcements section that will highlight important information to users as needed. To navigate the pages, click the desired option to be directed to the page.
Procurements is also the main dashboard where the list of Active Procurements and All Procurements is displayed. All Procurements may be searched by clicking on Search Filters, which will open a window enabling the user to narrow down search results. Click Search to apply the desired filters.

Advertisement will display on top the list of procurements the user has been invited to participate in, as well as the list of ongoing business opportunities. The Advertisements includes search filters options to enable the user to narrow down search results.
WBGeProcure RFx Now: Getting Started

**Invitations**
- Pane that displays the procurements the user been invited to participate in

**EOI Deadline**
- Date and time when the Expression of Interest is due.

**Procurement**
- Name of the project the procurement refers to

**Publication Date**
- Date and time when the procurement was advertised to the public
Resources displays links that will direct the user to the location where additional information and guidance can be found.
Submitting an Expression of Interest

- To express interest in an advertisement, navigate to Advertisements and select the procurement of interest. The details of the procurement will display. Review the details and ensure requirements align with your firm’s capabilities.
Submitting an Expression of Interest

- After reviewing the Advertisement Details select Express Interest. You will be directed navigate to the Expression of Interest (EOI) page.
Submitting an Expression of Interest

- Explain how your firm’s capabilities align with the Qualification Criteria. Criteria marked with “*” indicates that it is a mandatory requirement that must be met to be considered for participation in the procurement. Add documentation that supports your as needed. You can save responses as Draft or Submit when ready.
Submitting an Expression of Interest

- Once the EOI is submitted, the procurement will be added on the vendor’s procurement dashboard under Active Procurements. Clicking on the procurement will show “Expression of Interest Form” under Available Actions.
Submitting an Expression of Interest

- Clicking on the Expression of Interest Form under Available Actions displays a read-only version of the EOI responses submitted. Before the EOI Deadline, firms can Edit or Withdraw their interest at any time.
Submitting a Proposal

- Firms that are shortlisted on a procurement are invited to submit a proposal. The Submit Proposal and Read Terms And Conditions actions will become available in the procurement, they will display under Available Actions. These actions may be completed in any order.
Submitting a Proposal

- Clicking on Submit Proposal will open the Submit Proposal screen. Under Procurement Documents you can download the different document templates, see which documents are mandatory, and allows you to upload completed response documents. The Proposal Price field captures the value in USD and the Proposal Attachments lets firms add supplemental documents to their proposal package. At any time, firms may indicate their Intent to Submit a Proposal or Save As Draft their progress.
Submitting a Proposal

- To continue, click Read Terms And Conditions to review the World Bank Group’s General Terms and Conditions for Consulting Services. Firms will be able to download the document, and have the option to Agree, Disagree, or Agree With Conditions. If Agree with Conditions is selected, a comment window will open where the conditions or suggested edits must be documented. Selecting Disagree will disqualify the firm.
Submitting a Proposal

- Firms may return to their Available Actions while the submission deadline is valid. They may Edit their proposal responses or Withdraw it from consideration, if desired.
Contacts

corporateprocurement@worldbank.org

www.worldbank.org/corporateprocurement/
Questions