

IFI Bootcamp

Victoria, Canada 2007

Individual Consultants and SMEs: Consulting Opportunities with EBRD

Dirk Plutz
Senior Advisor
Consultancy Services Unit, EBRD



The Presentation:

- Consultants and EBRD
- Consulting Opportunities at EBRD
- What to Do and What Not to Do when Competing for Assignments



Introduction

- EBRD and its Clients engage consulting firms and individual consultants to obtain a wide range of independent expert advice and specialist consulting services to support the Bank's activities
- Systematic review of consultancy needs in connection with the Bank's investment/loan operations and management responsibilities. Preparation of consultancy assignment
- Internal review and approval by TC Committee of all TC funded consultancy assignments at the preparation stage. Consultant profile is identified including experience and expertise required, corporate or individual services, nationality restrictions if required by donors of TC funds



Ensuring Quality

- The focus is on quality of services to be provided
- How EBRD ensures quality
 - Clear objectives, structure, allocation of responsibilities, terms of reference; realistic budget and timeframe
 - Choosing consultants - relevant experience, qualifications and work plan / approach are paramount
 - When do capacity and size of consultancy firms matter?
 - Monitoring consultant's performance
 - Database with completion assessments



Users of Consultancy Services

- **EBRD's Clients:** for capacity building the Bank enables its Clients as beneficiaries of services to select, engage and manage consultants
- **EBRD Teams:** Banking Teams, Finance, Risk Management, Human Resources & Nuclear Safety, Environment, Procurement & Administration, Office of the Secretary General, Office of the General Counsel, Evaluation Department, Office of the Chief Economist, Internal Audit, Office of the Chief Compliance Officer, Communications, President's Office



Banking business groups

Central
Europe

Energy and
Telecom

SEECCA

SE Europe, Caucasus &
Central Asia
incl. TAM/BAS Programmes

Financial
Institutions

Russian
Federation

Infrastructure



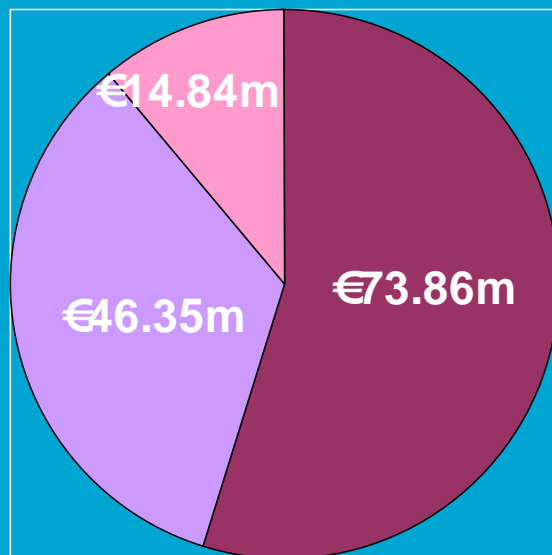
Consultancy Contract Awards by EBRD and its Clients in 2006

- 2,077 consultancy contracts with a total value of EUR 135.05 million were awarded
- More than half of the number of all contract awards were for individual services (including 614 contracts with TAM industry advisors)
- 86 contracts for a total of EUR 26.97 million were awarded by the Bank's Clients, either through grants provided by the Bank or by using loan proceeds of public sector operations
- Contracts were awarded to consultants from 62 countries
- Wider participation through consortiums, associations and subcontracting
- 47 contracts for a total of EUR 4.96 million were awarded to Canadian consultants (including 33 contracts with TAM industry advisors). The main areas of expertise provided by Canadian firms included financial, legal, industrial and environmental



Value and Number of Consultancy Contracts by EBRD Department/Team in 2006

Value of Contracts



- EBRD Banking Teams
- EBRD Non-Banking Teams
- Contracts awarded by the EBRD's borrowers funded from public sector loan proceeds

Department / Team	Value (€ million)	Number
Banking:		
- Financial Institutions	23.42	153
- Southern & Eastern Europe, the Caucasus and Central Asia	14.70	158
- Infrastructure	12.22	119
- Energy & Telecommunications	9.93	38
- BAS / TAM Programmes	9.25	763
- Others	4.34	123
Non-Banking:		
- Office of the General Counsel	20.68	395
- Finance including IT	16.83	126
- HR & Administration	4.21	53
- Office of the Chief Economist	1.83	52
- Others	2.80	84
Public Sector Loan Proceeds Funded	14.84	13
Total	135.05	2,077



Consultant Selection Methods

- In accordance with Section 5 of the Bank's Procurement Policies and Rules
- **Direct Selection** (for contracts below EUR 50,000) ensures economy and efficiency
 - Select consultant, negotiate and award contract
- **Competitive Selection** (Selection from Shortlist for contracts estimated to cost EUR 50,000 – EUR 200,000 and Evaluation of Proposals for contracts costing EUR 200,000 and over) ensures fairness and transparency
 - Announce opportunity, identify interested firms, identify qualified firms, solicit formal proposals (omit for selection from shortlist), select consultant, negotiate and award contract



2006 Contract Awards per Selection Method

- Direct Selection: 29% of the total value of all contract awards (individuals and firms)
- Selection from Shortlist: 19% of the total value of all contract awards (individuals and firms)
- Evaluation of Proposals: 52% of the total value of all contract awards (firms)



Contracting Methods

- Standalone contracts for clearly defined one-off assignment
- Framework agreements and framework contracts
- Panels of experts (board nominees, industry, institution building, procurement experts) to allow efficiency, flexibility and consultants' mobilisation at short notice



What to Do and What Not to Do When Competing for Assignments



How to get Business



Strategy for getting contracts

- Is your product or service needed?
- Where are the opportunities?
- Be focussed and selective - comparative advantage
- Monitor 'Procurement Opportunities'
- Contact client agency
- Compete: adhere to tender; submit responsive tender
- Learn from experience
- Explore: subcontracting opportunities; joint venture opportunities; local investment



Writing Proposals

- Objective is to be awarded the contract, not to carry out the assignment in the technical proposal
- Follow instructions
- Be clear, write short sentences
- Be focused
- Respond as per information requested and the Terms of Reference



www.ebrd.com/oppo/procure/oppo/index.htm

- EBRD's new projects
- Project Pipeline and executing agencies
- Projects approved
- Lists the latest public and private sector projects approved by the EBRD
- Contract awards
- Major contracts that were awarded in operations financed by the EBRD
- Procurement notices

(These pages are regularly updated)



www.ebrd.com



HOME

About the EBRD

News & events

Publications

Countries & sectors

Projects

Environment & safety

Apply for financing

Capital markets

Working together

Procurement

Jobs

Syndications

Donors

NGO dialogue

Search

procurement

The EBRD provides many opportunities for suppliers, contractors and consultants worldwide. This area contains information about the EBRD's procurement policy, procurement and consultant opportunities, and contract awards.

- [About procurement and the EBRD](#)
- [Policy and rules, Standard tender documents and Guidelines](#)
- [Procurement notices](#)
- [Project pipeline and Contract awards](#)
- [Contact us](#)

If you would like to be notified when new procurement notices are disclosed, subscribe to [EBRD email alerts](#).



[Terms and conditions](#) [Sitemap](#) [Feedback](#)



www.ebrd.com

What to do?

- Respond to procurement notices for individual assignments as published at the Bank's website <http://www.ebrd.com/oppo/procure/opps/consult/index.htm>
- Subscribe to e-mail alerts through the Bank's website
- Register with the TurnAround Management and Business Advisory Programmes (permanent procurement notices)
- Register in the database of law firms (permanent procurement notice) - outsourcing of legal work by the Office of the General Counsel



Other Opportunities for Consultants

- Procurement Opportunities with other consultants working with the Bank
 - over 800 consultants working on the Bank's projects at any given time
- Project Evaluation Department
 - consultants for evaluation of completed projects - lessons learnt
- Nuclear Safety Department
 - specialists for project preparation, procurement and specific task for project implementation i.e. Chernobyl Shelter Fund



How to contact us

- ***Project enquiries (existing EBRD projects only)***
Tel: +44 (0)20 7338 6282 / fax: +44 (0)20 7338 7380
- ***Business Development and project proposals***
Tel: +44 (0)20 7338 7168 / fax: +44 (0)20 7338 7380
- ***General enquiries***
Tel: +44 (0)20 7338 6372 / fax: +44 (0)20 7338 6690
- ***Procurement opportunities***
via web site: www.ebrd.com
- ***Publications***
Tel: +44 (0)20 7338 7553 / fax: +44 (0)20 7338 6102
- ***Consultancy Services Unit***
Tel: +44 (0)20 7338 6863 / fax: +44 (0)20 7338 7451

