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# GUIDE TO INTERNATIONAL DEVELOPMENT PROJECT BIDDING

A TEAM CANADA INC PUBLICATION



Team Canada inc • Équipe Canada inc

Canada 

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## TEAM CANADA INC

# GUIDE TO INTERNATIONAL DEVELOPMENT PROJECT BIDDING

### INTRODUCTION

It's estimated the 'International Development Market' – or commitments of loans and grants to developing and transition countries by bilateral donors and multilateral agencies – amounts to approximately CAD \$160 billion annually. The major Multilateral Development Banks (MDBs such as the World Bank, Inter-American Development Bank, Asian Development Bank, European Bank for Reconstruction and Development, African Development Bank) account for almost CAD \$50 billion of that. Most of the remaining balance is financed by other agencies such as Multilateral Financial Institutions (MFIs) and Bilateral Development Agencies (BDAs).

This Guide to International Development Project Bidding seeks to present a comprehensive, practical roadmap to pursuing international development business opportunities in projects funded by Multilateral Development Banks (MDBs), United Nations agencies, the Canadian International Development Agency (CIDA), foreign bilateral development agencies, and other international development funding sources.

The increasing 'untying' of development assistance, aid 'harmonization', modalities such as 'budget support', and other trends have implications for how companies approach the development business market. These trends have also opened up new windows of eligibility for Canadian firms, thereby expanding the range of international development contract opportunities available to Canadian firms.

Identifying, pursuing and bidding on contracts in this highly competitive international development project business necessitates both an understanding of complex public procurement procedures, as well as the processes by which development projects are programmed, planned and executed.

This Guide is designed to assist enterprises in:

- [\*Understanding the Process\*](#). Information on a wide range of project funding agencies and the processes used by these agencies for country, sector and project programming
- [\*Identifying and Tracking Opportunities\*](#). Where to find key procurement resources and guidelines, project pipelines, upcoming bidding opportunities and notices and other key information
- [\*Effective Engagement and Bidding\*](#). Key strategies for engagement and marketing, working with partners, and preparing winning proposals.

## OVERVIEW OF KEY DEVELOPMENT PROJECT FUNDING SOURCES

The following provides an overview of the major MDBs, MFIs, BDAs, and UN agencies.

### *Multilateral Development Banks*

Multilateral Development Banks (MDBs), also referred to as International Financial Institutions (IFIs), provide grants and loans to countries for a wide variety of development projects.

These projects are focused on social and economic development and are implemented by executing agencies (usually government departments) that are responsible for the related procurement of goods and services based on the guidelines of the lending institution.

Only firms from countries who are members of the MDBs are eligible for procurement arising from MDB project financing. Canada is a member of all of the major MDBs. [Click here to go to a summary table listing the major Multilateral Development Banks and resources.](#)

The MDBs provide financing for development through a variety of mechanisms:

- Long-term loans, based on market interest.
- Longer-term loans (often termed credits), with interest well below market interest.
- Grant financing for technical assistance (TA), advisory services or project preparation.
- Trust Funds established by MDB member countries permitting MDBs and client countries to finance consultancies and other TA.

### *Other Multilateral Financial Institutions and Facilities*

Several other banks and funds that provide funding to developing countries are also identified as multilateral development institutions, and are often referred to as **Multilateral Financial Institutions (MFIs)**. They differ from the MDBs by having a narrower ownership/ membership structure or in focusing on special sectors or activities.

The funding mechanisms used by these agencies include interest-bearing loans, credits and guarantees, non-reimbursable grants, and incremental financing. These agencies also occasionally cofinance projects with MDBs.

National eligibility for bidding on contracts funded by MFIs depends on the rules of each institution. With the increasing 'untying' of development assistance, eligibility is expanding. [Click here for a summary table listing the major Multilateral Financial Institutions and resources.](#)

### *Bilateral Development Agencies*

Bilateral Development Agencies (BDAs), such as the Canadian International Development Agency (CIDA), provide support to development via various funding mechanisms, including direct contracting for goods and services, and grants and contributions to governments and international agencies. Some also provide financing via loans, and credits for equipment purchases. Many foreign bilateral agencies' development assistance is increasingly becoming "untied" – thus yielding new bidding opportunities for Canadians.

Projects initiated by CIDA often result in what is referred to "directed programming". These projects are developed in cooperation with developing countries and are implemented through competitive processes. Competitive processes, through requests for proposals (RFPs), are always open in Canada to the profit and not-profit sectors.

[Click here to go to a summary table listing of the major Bilateral Development Agencies and related resources.](#)

### ***United Nations Agencies***

The [United Nations \(UN\) System](#) is made up of over 50 entities (agencies, organizations, commissions, programs, funds, etc.) which make available over CAD \$7 billion annually for the procurement of goods and services to support development and humanitarian aid in more than one hundred countries. Canadian firms are eligible to bid on all UN-funded contracts.

UN system funding is in the form of grants and is mostly for technical assistance programs and small-scale projects. The UN Development Group, which includes the UN Development Programme (UNDP), the UN Children's Fund (UNICEF), the UN Population Fund (UNFPA), and the World Food Programme (WFP) provide technical advice and fund small-scale projects in almost every developing country. Specialized agencies and programmes such as the UN Environment Programme (UNEP), the Food and Agriculture Organization (FAO), and the UN Educational, Scientific, and Cultural Organization (UNESCO) do similar work in their respective areas of expertise. Larger projects are often implemented by the UN Office for Project Services which is increasingly involved in reconstruction work in post-conflict countries.

[Click here for a summary table listing the major Multilateral Financial Institutions and resources.](#)

*The following chart provides a summary of the major MDBs, MFIs, BDAs, and UN agencies with links to overview fact pages on International Trade Canada's 'International Financing Information Network' ([IFInet](#)).*

## Summary Table of Key Multilateral, Bilateral, and United Nations Agencies

Institution	Canadian eligibility	Primary Funding Modalities	Canadian Success Stories	Procurement guidelines	More Info (Overview, Geographic Focus, Sector Priorities)	
<b>Multilateral Development Banks</b>						
<a href="#">World Bank</a>	Yes	Interest bearing loans; Equity; Grants and Technical Assistance; trust funds; <a href="#">Budget support</a> and <a href="#">SWAps</a>	<a href="#">WB Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">African Development Bank</a>	Yes		<a href="#">AfDB Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Asian Development Bank</a>	Yes		<a href="#">AsDB Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Inter-American Development Bank</a>	Yes		<a href="#">IDB Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Caribbean Development Bank</a>	Yes		<a href="#">CDB Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">European Bank for Reconstruction and Development</a>	Yes		Loans, equity, guarantees to private sector and TA for public sector	<a href="#">EBRD Success Stories</a>	<a href="#">Procurement Homepage</a>	<a href="#">IFInet Fact Sheet</a>
<b>Other Multilateral Institutions &amp; Funds</b>						
<a href="#">The European Commission (EC)</a> o <a href="#">EuropeAid</a> o <a href="#">European Investment Bank</a>	No Yes	Modalities include interest-bearing loans, non-reimbursable grants; These agencies also occasionally cofinance projects with MDBs such as the World Bank and, increasingly, via general and sector-wide <a href="#">budget support</a> to governments		<a href="#">Guide to Procurement</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Islamic Development Bank</a>	Partial			<a href="#">Procurement guidelines</a>	Coming Soon	
<a href="#">North American Development Bank</a>	Yes		<a href="#">NADB Success Stories</a>	<a href="#">Guidelines &amp; procedures</a>	Coming Soon	
<a href="#">Global Environment Facility</a>	Yes			See: <a href="#">IFInet Fact Sheet</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">International Fund for Agriculture Development</a>	Yes			<a href="#">Business Opportunities</a>	Coming Soon	
<b>Bilateral Agencies</b>						
<a href="#">Canadian International Development Agency</a>	Yes	Majority of funding is in form of non-reimbursable grants. Some agencies also provide loans and guarantees. Many agencies increasingly use <a href="#">‘budget support’</a> mechanisms whereby funds are provided for general budget support to recipient governments.		<a href="#">Guide to Working with CIDA</a>		
<a href="#">Department for International Development (UK)</a>	Most/All		<a href="#">BDA Success Stories</a>	<a href="#">Procurement contract documents</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">German Development Bank (KfW) *</a>	Most		<a href="#">BDA Success Stories</a>	<a href="#">Procurement Guidelines</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">German Agency for Tech Coop'n (GTZ)</a>	No		<a href="#">BDA Success Stories</a>	<a href="#">Procurement Guidelines</a>		
<a href="#">Netherlands Development Cooperation</a>	Partial		<a href="#">BDA Success Stories</a>	See IFI Fact Sheet	Coming Soon	
<a href="#">Swedish International Development Agency</a>	Most		<a href="#">BDA Success Stories</a>	<a href="#">SIDA procurement Guidelines</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Norwegian Agency for Development Cooperation</a>	Most		<a href="#">BDA Success Stories</a>	<a href="#">Business Opportunities</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Danish International Development Agency</a>	Most		<a href="#">BDA Success Stories</a>	<a href="#">Procurement Guidelines</a>	IFInet Fact Sheet	
<a href="#">Lux Development</a>	Yes		<a href="#">BDA Success Stories</a>	<a href="#">Procurement Guidelines</a>	Coming Soon	
<a href="#">Swiss Agency for Development &amp; Cooperation</a>	Partial		<a href="#">BDA Success Stories</a>	<a href="#">Requirements</a>	Coming Soon	
<a href="#">Agence francaise de développement</a>	Partial		<a href="#">BDA Success Stories</a>	<a href="#">Project cycle</a>	<a href="#">IFInet Fact Sheet</a>	
<a href="#">Japanese Official Development Assistance</a>	Partial		<a href="#">BDA Success Stories</a>	See IFInet Fact Sheet	<a href="#">IFInet Fact Sheet</a>	

<a href="#">Development</a>			<a href="#">Stories</a>		
<a href="#">Saudi Fund for Development</a>	Partial		<a href="#">BDA Success Stories</a>	See IFInet Fact Sheet	Coming Soon
<b>United Nations Agencies</b>					
<a href="#">United Nations Development Programme</a>	Yes	Technical Assistance for public sector and funding for small-scale and pilot projects	<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
United Nations Environment Programme	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	Coming Soon
United Nations Children's Fund	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
World Food Programme	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
Food and Agriculture Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
World Health Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
Pan American Health Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
United Nations Population Fund	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
United Nations Educational, Scientific, and Cultural Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
International Civil Aviation Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
World Meteorological Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
United Nations Human Settlements Programme	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	Coming Soon
Joint United Nations Programme on HIV/AIDS	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	Coming Soon
International Labour Organization	Yes		<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>
United Nations Office for Project Services	Yes	Implementation of larger development projects	<a href="#">UN Success Stories</a>	<a href="#">General Business Guide</a>	<a href="#">IFInet Fact Sheet</a>

## UNDERSTANDING THE PROCESS

In addition to understanding public procurement processes and guidelines, companies pursuing contract opportunities in the development project business will be better prepared to identify and respond to new opportunities by developing an understanding of the processes by which individual projects are conceived, prepared and implemented, along with the respective roles and responsibilities of key actors. It is equally important to understand recent trends with respect to funding modalities of the institutions and significant initiatives designed to improve 'aid effectiveness'.

A central theme underlying all of these initiatives is greater country ownership of development processes and, accordingly, a substantial increase in the role and responsibility of the country throughout the entire process of programming, planning and implementation, including contracting.

Such processes have implications for procurement eligibility (i.e., increased "untying" of aid) and for a firm's marketing strategies (i.e., recipient governments playing a greater role as project manager and client). Moreover, understanding these new processes and trends can yield valuable information and intelligence to assist a firm's marketing planning.

### *Country Program and Project Development*

Traditionally, individual development project funding agencies determined their investment priorities based on country programming exercises which were founded on each agency's own development strategies and policies (e.g. priority sectors such as the environment, and themes such as gender equity) together with the needs and priorities expressed by client recipient countries. While this process typically involved consultations with other multilateral and bilateral donors, coordination amongst the many players was complicated, sometimes resulting in duplication, fragmentation, and higher aid administration costs.

As a result, several key initiatives have evolved in recent years with the overall objective of improving aid effectiveness, efficiency and coordination, and greater country ownership.

- [UN Millennium Development Goals](#). At the United Nations Millennium Summit in September 2000 world leaders adopted the Millennium Development Goals (MDGs), which set clear targets for reducing poverty, hunger, disease, illiteracy, environmental degradation, and discrimination against women by 2015. All 191 member states of the United Nations agreed upon the establishment of eight (8) development goals and have pledged to meet them by the year 2015. ***These goals now serve as an overarching priority in guiding multilateral and bilateral development agencies in their project programming and planning.***
- [Harmonization of Aid](#). To achieve greater synergy, efficiencies and effectiveness, and to reduce the cost and burden of administering tens of thousands of development assistance projects funded by dozens of agencies, the MDBs and many other development agencies are working together to "harmonize" approaches to aid. A key objective of aid harmonization is to achieve greater policy and program coordination and to align donor support around country-owned national development goals and strategies.
- [Poverty Reduction Strategies](#). In low-income countries, development assistance priorities are based on the Poverty Reduction Strategy Paper (PRSP), which outlines the development plan of the recipient government. A PRSP is the expression of country consensus on development priorities for reducing poverty and therefore the foundation for country "ownership". Most donors will adhere to the PRSP and determine their priorities in

coordination with others to avoid duplication. [PRSPs](#) are available on the World Bank website.

- Country Assistance Strategies. Most donors will also prepare their own Country Assistance Strategies (CAS), which will outline their specific areas of focus. These strategies will usually detail key investment priorities, including indicative project pipelines, and whether aid will be delivered through direct budget support or for funding of specific projects. Some select useful country program resources are as follows:

- [World Bank Country Assistance Strategies](#)
- [Inter-American Development Bank Operational Strategies](#)
- [Asian Development Bank Country Strategy and Programs](#)
- [Caribbean Development Bank's Country Poverty Assessment Reports](#)
- [European Bank for Reconstruction and Development Country Strategies](#)
- [UK Department for International Development Country Strategy Papers](#)
- [EuropeAid Country & Regional Strategy Papers](#)
- [Japan Bank for International Cooperation's Medium Term Strategy](#)
- [German Development Bank Country Brochures](#)
- [Swedish International Development Agency Country & Regional Strategies](#)
- [UN Development Assistance Frameworks](#)
- [CIDA Country Development Policy Frameworks are available in the Regions and Countries section of their website.](#)

Mindful of the need for harmonization and inter-agency cooperation, a noteworthy trend has been emerging in country programming wherein numerous bilateral development agencies, including CIDA, have been focusing on a narrower range of countries, in lieu of trying to spread limited resources across many countries.

In this respect, CIDA has been increasing its aid investments in a select number of priority sectors in nine developing countries: Bangladesh, Bolivia, Ethiopia, Ghana, Honduras, Mali, Mozambique, Senegal and Tanzania. CIDA will focus more resources on a small number of sectors chosen in partnership with the recipient countries themselves, and based on the priorities identified in their national plans for poverty reduction. All nine countries are low-income and have in place formal national plans for poverty reduction (full or interim Poverty Reduction Strategy Papers). Additional countries may be identified for increased Canadian assistance as circumstances and resources permit. See '[New Canadian Investments in Nine Developing Countries](#)'.

### ***Implementation and Procurement***

- [Untied Aid](#). The Development Assistance Committee (DAC) of the OECD has recommended an increased 'untying' of aid. Untied aid is development assistance financing that can be used to pay for purchases of goods and services from any country, rather than just from the donor country providing the funding. It is designed to create more effective competition in the use of such funding, and allow developing countries themselves to choose the goods and services they need at the most advantageous price. The initial emphasis has been on agreements to untie aid to the least developed countries. (See the DAC [List of Aid Recipients](#) for the classification of least-developed countries). The OECD launched the [Untied Aid Bulletin Board](#) where donors can post upcoming opportunities that are open to international competition.

### ***Aid Delivery Modalities***

In an effort to make development assistance more effective, the search for new aid delivery mechanisms to enhance development is high on the agendas of international development agencies. While traditional modalities (i.e., project or sector-specific loans and grants) do continue to predominate, recent – and growing – trends include:

- **Budget Support.** General Budget Support focuses on development being led by local governments, and is one of a number of instruments – or modalities – that development agencies are increasingly using to deliver aid. Budget Support represents a shift away from supporting ‘projects’ towards ‘programmatic’ forms of aid. The aim is to move away from sector or project-specific conditionality (i.e., the conditions traditionally attached to loans and grants for structural and sector adjustment operations) and towards more general macro-economic support with the goal of reducing poverty by improving the efficiency and effectiveness of governance institutions, policy and processes. A key implication of budget support programs is that procurement is typically managed by the local government.

Another related modality is ‘sector-wide approaches’:

- **SWAps.** A SWAp (Sector Wide Approach) is a method of working between and amongst governments, development agencies and some NGOs, in which funding for a particular sector is provided to support an agreed sector policy and expenditure program. The process is led by local government. Many such approaches involve the use of government procedures for disbursing and accounting for the funds provided. SWAps are usually underpinned by a set of values that emphasize national ownership, national execution – *including procurement* – and policy dialogue.

In the context of ‘Budget Support’ and sector-wide approaches (SWAps) and other new mechanisms, ‘pooling’ of funds for development assistance is being used as a means to reduce the fragmentation of externally funded development activities, to encourage country ownership, and to reduce the considerable administrative burden on developing country governments. Pooling refers to the sharing or transfer of resources among international development agencies to support the policy objectives of a developing country. Pooling is seen as the integration of development funding into a single management and financing framework under recipient country ownership or with third-party management support. Pooled funds can be structured to finance investment projects as well as general and sectoral budget support. An example of a pooled fund is the [Nile Basin Initiative](#).

These and other trends can also be further examined by visiting a variety of development information sites, including:

- [OECD's Development Co-operation Directorate \(Development Assistance Committee\)](#)
- [ELDIS Gateway to Development](#)
- [Development Gateway](#) is a major portal covering development themes, donor agencies, and country and topic gateways.

Key information on Canada’s policy, positions and role in these trends can be accessed by viewing the CIDA [Policy Statement on Strengthening Aid Effectiveness](#). Also, on February 16, 2004, CIDA released their [Sustainable Development Strategy 2004-2006: Enabling Change](#). This strategy sets out a number of key directions for the Agency to advance sustainable development.

## IDENTIFYING AND TRACKING OPPORTUNITIES

The strategic pursuit of contracts in current and upcoming projects and related tenders funded by international and bilateral development agencies entails systematically [identifying](#) projects and tenders in your target countries and sectors of interest, qualifying opportunities in those projects, and tracking them on an ongoing basis.

### *The Project Cycle*

Fundamental to the process of pursuing MDB-funded contract opportunities is understanding the formal [MDB Project Cycle](#) which defines how MDB projects are themselves programmed, identified, prepared, and approved. It is also important to have a full understanding of the [Procurement Guidelines/Policies](#) of the MDBs and other international agencies which essentially constitute the 'rules of the game' for bidding.

There are numerous key sources of information on projects in the MDB's and other agency's "pipelines" and an increasing array of methods to track and develop additional information on target projects.

The ongoing process of researching, identifying, qualifying and tracking international development market contract opportunities is greatly facilitated by a variety of on-line [Sources of Project and Tender Information](#).

The information obtained from these sources is only part of the process. Identifying projects at the early stages, tracking them, and qualifying bidding prospects also entails [informal information and intelligence gathering](#) (i.e., timing, scope, competition) from the executing agencies of the projects, from officers within the respective development agency, and from other key actors.

### *Procurement Guidelines/Policies*

Each international development agency prescribes policies and guidelines by which procurement tenders are managed, including how opportunities are advertised. Part of the global initiative for the harmonization of aid includes [Harmonization of Procurement Guidelines](#) (e.g., standard bidding documents) in order to simplify procurement for their borrowing country members (and for suppliers) as well as to provide for greater transparency. The MDBs are also increasingly moving towards Electronic Government Procurement (e-GP). The MDBs have created the [MDB e-GP Website](#) and [MDB e-GP Toolkit](#) to assist countries in developing and implementing electronic procurement.

- ***MDB Procurement Policies/Processes and Guidelines.*** See [Summary Table of Key Multilateral and Bilateral Development Agencies](#) for links to the main procurement pages of the MDBs and MFIs, which contain descriptions and details on each institution's procurement policies and specific guidelines.
- ***Canadian International Development Agency.*** Forms, templates, handbooks and guides on procurement, including [Guide to Working with CIDA](#) can be found on CIDA's [Want to Do Business?](#) webpage.
- ***United Nations Agencies.*** A key starting point is the UN General Business Guide which provides basic information on over 30 UN Agencies and offices. Also see the [United Nations Procurement Guide](#) : A CanadExport Supplement.

### ***Standard Bidding Documents***

Standard Bidding Documents (SBDs) are "templates" that borrowers use to procure goods, works and services for competitively tendered MDB-financed contracts. In contrast to the procurement guidelines, SBDs set out provisions for a particular bid. Of most interest to consultants and consulting firms is Standard Request for Proposals (SRFPs).

SMEs with little proposal writing experience on MDB-financed projects should consider reviewing the SDB's and SRFPs.

- **World Bank** – [Standard Bidding Documents](#)
- **IDB** – [Standard Procurement Documents](#)
- **Asian Development Bank** – [Standard Bidding Documents](#) (procurement of goods/equipment) and [Standard Bidding Documents \(consulting\)](#).
- **African Development Bank** – [Standard Procurement Documents](#)
- **EBRD** – [Standard Tender Documents and Guidelines](#)

### ***Sources of Project and Tender (Bid) Information***

There is a growing array of information sources, mostly online, for MDB projects and related contract bidding opportunities, as well as for other multilateral and bilateral development institutions. Until recently, the most comprehensive source was the subscription tabloid and online service, [UN Development Business](#), which contains searchable listings of projects in most of the MDB's pipelines, as well as the General Procurement Notices (GPNs) and Specific Procurement Notices (SPNs) which constitute the formal public announcements and requests for expressions of interest and/or proposals.

Another key source for project and tender information is the subscription online marketplace, [Development Gateway Market \(dgMarket\)](#), providing information on MDB, MFI, bilateral donor and government-funded tenders. Currently, dgMarket publishes tender notices for projects funded by the World Bank, African Development Bank, the Asian Development Bank, Europe Aid, European Bank for Reconstruction and Development, European Investment Bank, EU member states and others. dgMarket is the business and procurement opportunity site within the development portal, [Development Gateway](#). It also provides an email alert service based on preselected criteria.

Canadian firms should also use [MERX](#), Canada's official public tender portal. Access to MERX was until recently subscription based but is now free of charge. MERX allows companies to set up a business profile and receive, via email, notices of RFPs and includes the ability to download the CIDA RFP document directly. Another free key Canadian procurement information portal is [SourceCan](#). It is a primary source for tender notices with respect to most of the major MDBs, MFIs, as well as bilateral development agencies. *Search criteria include the ability to search for opportunities related to 'untied aid'.*

Executing agencies of projects in the borrowing countries are also required by MDB procurement guidelines to publish General Procurement Notices and Specific Procurement Notices in local newspapers and in some cases international journals such as The Economist.

For a summary of the services offered and institutions covered by some of the main e-procurement sites, see: <http://www.infoexport.gc.ca/ifinet/resources-e.htm>

➤ **Summary of key sources of 'early stage' project (pipeline) information**

- World Bank Monthly Operational Summary. Can be found at [UN Development Business \(UNDB\)](#) but also in the World Bank's website at [WB MOS](#). Projects in the pipeline for each country can also be found in the [World Bank country pages](#) of the World Bank website. The World Bank also provides [World Bank Project Information Documents](#) available from the listings in the country pages or by search. Project Information Documents (PID) contain detailed information on World Bank projects being prepared.
- IDB's pipeline of projects under preparation is available at Development Business and at the IDB's own website at [IDB Project and Procurement Information](#). The IDB also lists [recently approved IDB projects](#). You may also search proposed and/or approved projects in the [IDB Country Pages](#).
- AsDB posts [AsDB proposed projects](#) categorizing specifically into both "loan projects" as well as "technical assistance" projects.
- Caribbean Development Bank also posts their [CDB projects in the pipeline](#).
- African Development Bank lists [prospective project briefs](#)
- EBRD provides project summaries for pre-approved projects at their [EBRD projects page](#).
- CIDA publishes project information on [projects that are currently in the planning stages](#) according to region.

Firms should also keep in mind that critical information, intelligence and assistance at all stages of the project is obtainable from Canadian [Trade Commissioner Service](#) officers stationed in Canadian Embassies and High Commissions around the world.

➤ **Summary of Primary Sources of Procurement (Bidding) Notices**

- [MERX](#): Canada's official public tender portal.
- [SourceCan](#), Canada's e-marketplace and business opportunities network. (Includes procurement notices for tenders funded by the MDBs, and other multilateral agencies and bilateral development agencies).
- **UNDB**. The most comprehensive source for procurement notices – both General Procurement Notices and Specific Procurement Notices for all of the MDBs and many UN agencies are published in [UN Development Business](#).
- **dgMarket**. The procurement notices of most MDBs (i.e., IDB not yet included) as well as many bilateral donors are also now available at [dgMarket](#).
- The **World Bank** also posts [current WB requests for expressions of interest](#) on their website pertaining mostly to larger value assignments which they are tendering directly.
- **Inter-American Development Bank** Procurement Notices are now listed on the IDB's website for free at their [Project and Procurement](#) site, as well as in UNDB (*though not yet in dgMarket*).
- **Asian Development Bank** posts [procurement notices](#) on their website as well.

- **African Development Bank** has begun posting [general procurement notices](#) and [specific procurement notices](#) on its website
- **Caribbean Development Bank** also posts some of their [procurement opportunities](#) on the website.
- **EBRD** posts procurement and other notices on their [EBRD Procurement Notice](#) site, and now also provides an [EBRD Email Procurement Notice Alerts](#)
- CIDA-managed RFPs are posted on the [MERX](#)
- **Foreign Bilateral Agency** contract opportunities can be viewed at the [Untied Aid Bulletin Board](#) where donors can post upcoming opportunities that are open to international competition.
- **United Nations agencies** post an increasing amount of procurement notices on the [IAPSO website](#)

### ***Identifying Opportunities***

Given the range of projects being funded by the numerous international agencies and the increasing variety of sources of information, firms are encouraged to use all of the major online [sources of project and tender information](#) to identify and research projects and related documents. The following tips apply primarily to projects funded by the MDBs.

#### ***Tips for identifying opportunities:***

- *Start by doing a “country” project search of project pipelines and projects in implementation.* This will establish an initial long list of all projects for your countries of interest.
- *Isolate projects with pertinent themes or components.* Project descriptions typically indicate the major sector and functional areas. Keep in mind, however, for projects in early stages, descriptions can be vague.
- *Identify key contacts.* These are available in each project description and/or project documents, and via the respective [Canadian Office for Liaison with International Financial Institutions](#) and/or from the [Trade Commissioner Service](#).
- *Review project documents.* Many project descriptions will have a link to a project document. Firms should review the relevant sections of these documents to find out more detail (timing, budgets, etc.) about pertinent components. Keep in mind that the farther along a project is in the “project cycle”, the more information will become available in the project documents.
- *Review secondary material.* The more you know about the priorities of the country and the MDB, the easier it will be to qualify projects and build engagement plans. For example, find time to review country strategy papers of the various funding agencies.

### ***Informal Mechanisms of Information and Intelligence Gathering***

Once you have identified potential opportunities, the challenge is to ‘qualify’ the opportunities in these projects. Qualifying the opportunities will permit you to prioritize the opportunities in your pipeline and, accordingly, plan and execute effective marketing strategies.

While accessing the formal sources of project and procurement information is essential, it is equally important to augment this information with intelligence developed from key decision makers and other actors involved in the development and implementation of the projects.

It is useful to distinguish between project “information” (i.e., project description/profiles, reports, budgets, etc. attainable from publicly available documents) and project “intelligence” (i.e., key information on the timing, scope, content of the project or bid, attainable mainly by talking to project officials). Publicly available project information can be out of date or incomplete. Project intelligence, from officials connected to the project, is timely and more valuable.

*As a result, qualifying opportunities inevitably involves meeting with government and funding agency officials working on the project.*

This includes:

- Communicating (including meeting) with project officers and key decision makers in the Project Implementing Units (PIUs) in the recipient country;
- Communicating (including meeting) with appropriate funding agency officials (either at the headquarters of the agency or in their field offices);
- Communicating with other actors and stakeholders, including local partners and other project participants, including consultants;

Through interviews with key actors, and through document research, firms should try to determine the following:

- ***Specific Components, subcomponents, and the type of solutions that will be required on the project:*** a key issue is whether your firm’s products and services will be required for the contracts in the project;
- ***The overall budget estimate for the contract(s) of interest to you;***
- ***The estimated value of such contracts;***
- ***How the contract(s) will be tendered:*** What procurement or consultant selection method (i.e., quality-cost-based-selection, international shopping, etc.) will be used.
- ***When the tender(s) will be held or the RFP(s) issued;***
- ***Ascertain mandatory requirements regarding eligibility (i.e., financial capacity)***

A variety of useful business guides pertaining to the international business development market, including with regard to specific institutions, are available by visiting [IFInet](#).

*The following page is the internally linked (from first page/second paragraph of above section) description of the MDB project pipeline, and documents available at various stages.*

### ***The MDB Project Cycle***

*(Internally linked page from the second paragraph of above section, 'IDENTIFYING AND TRACKING OPPORTUNITIES'. In web version, this could be a pop-up box. In hardcopy version, this could perhaps be a text box placed on the first page of the section.)*

The MDBs and the countries that borrow from them plan and develop projects by following a multi-stage process called the "Project Cycle". The following describes the World Bank project cycle. However, it is generally applicable to the other MDBs as well.

When the World Bank and other MDBs lend funds to a developing country for a project, a Project Implementation Unit (PIU) (also called an "Executing Agency") is created in the government. While both MDB and PIU staff share aspects of project preparation, it is the PIU, and not the Bank, that is responsible for virtually every element of project execution, including the procurement of goods, equipment, consulting and other services. Accordingly, marketing efforts by firms should be focused primarily on the PIU for the project in the borrowing country.

The Project Cycle has 6 stages which are described below. Different project documents are available at each stage. Firms can access these documents by visiting the web sites of the individual MDBs and other key [online sources of project information](#).

Before a project loan is approved, it evolves through the following stages:

***Identification:*** This first phase of the cycle concerns identifying projects that appear appropriate for the country's priorities and development strategy, as well as suitable for Bank support. Both the Bank and the borrowing country are involved in this process. Useful World Bank documents at this stage include the Monthly Operational Summary (MOS), the [Poverty Reduction Strategy \(PRS\)](#) papers, and the [Country Assistance Strategy \(CAS\)](#).

***Preparation:*** After a proposed project has entered the "pipeline" it is further studied and defined. Feasibility studies and detailed project design usually occur at this stage. Preparation, which lasts from 1 to 2 years, is mainly the borrowing country's responsibility. Information on projects at this stage of the project cycle can be found in the Monthly Operational Summary (MOS) and the [Project Identification Document \(PID\)](#) as well as from PIU staff.

***Appraisal:*** Bank staff conducts an in-depth assessment of the technical, environmental, financial and economic elements of the project. The appraisal phase is the Bank's sole responsibility, takes 3 to 6 months to complete, and culminates with a detailed [Project Appraisal Document \(PAD\)](#) or Project Proposal and for many Technical Assistance projects, a [Technical Annex](#).

***Negotiation:*** The Bank and the borrower negotiate the loan agreement and project implementation plans. The negotiations last one or two months, after which the Appraisal Report and loan documents go to the Board of Directors for approval. The loan becomes effective only after being signed by the country and upon other formalities, usually two to four months subsequent to Board approval.

After the loan is approved, the following stages are executed:

***Implementation and Supervision:*** Implementation of the project, including procurement, is the responsibility of the borrower and is carried out with minimal Bank assistance. However, the Bank does oversee and approve all major procurement decisions made by the borrower. The

length of the implementation phase can vary considerably depending on the project's nature but is typically several years.

During this stage bidders are notified about opportunities via the publishing of General Procurement Notices (GPN) and Specific Procurement Notices (SPN).

**Evaluation:** This final phase is a Bank assessment of the project and of the results achieved. It is performed after the project has been completed and all funds have been disbursed. The evaluation phase normally requires 6 months to complete.

### The Project Cycle, Responsibilities, and Publicly Available Info

Stage of the Project Cycle	Responsibility	Available Documents
Identification	MDB and Borrower	MOS
Preparation	Mainly Borrower	MOS, PID, Profiles
Appraisal	MDB	PAD, Project Loan Proposals (IDB, AsDB)
Negotiation	MDB and Borrower	GPN
Implementation and Supervision	Borrower	SPN/RFP, Contract Award Notices
Evaluation	MDB	–

*Further information:*

[World Bank Project Cycle](#) (Diagram and detailed description and key links).

[Inter-American Development Bank Project Cycle](#)

[Asian Development Bank Project Cycle](#)

## EFFECTIVE ENGAGEMENT AND BIDDING

Winning competitively-bid international development business contracts requires strategic action-oriented engagement on an ongoing basis. Therein, effective engagement planning implies positioning, marketing and bidding, and entails two critical strategies in particular:

- Engaging with and developing relationships with key decision makers in the project implementing agencies and with appropriate funding agency staff/officers, as well as with local partners and other project participants;
- Participation in the formal bidding processes and delivering effective proposals, expressions of interest and other submissions.

Given the size and complexity of most international development projects, the project cycles can be lengthy and involve dozens of stakeholders and actors. Different engagement activities and steps are required at the various stages of a project's evolution through the project cycle.

[Strategic Success Factors](#). As context for your engagement planning, this subsection provides an overview of success factors shared by companies that win international development business contracts.

[Marketing Your Services – Engagement Actions](#). Guidance on the types of strategies for pursuing international development business contracts, and recommended marketing activities for each stage of the project cycle. Though generally focused on MDB projects, the approach is generally applicable to projects funded by other international funding agencies as well.

[Competitive Bidding](#). Key considerations on preparing for the competitive bidding process, and tips on writing effective expressions of interest and proposals.

### *Strategic Success Factors*

Selling goods, equipment, and services, either directly to an international development agency or to the government of a developing country, is highly competitive.

Experience has shown that several attributes, or “success factors”, are shared by companies that win these contracts. Firms are encouraged to assess their own capabilities and those of their partners to see whether the following attributes exist and, if deficient, how to attain them.

#### ➤ *Technical Expertise and Experience*

Regardless of the type of opportunity, top qualifications and expertise are essential. MDBs and developing countries have access to hundreds of consultants, firms and suppliers. They can afford to be selective, ensuring a fit between available expertise, price and the unique requirements of the assignment.

#### ➤ *Local Partners*

Most MDB bidding guidelines for contracting for services allocate points for use of local consultants or experts. Failing to have qualified, local participation on a proposed project team can be a significant competitive disadvantage. Moreover, local firms are now winning more and more of the international development business market. The Canadian [Trade Commissioner Service](#) is an excellent starting point for assistance in locating qualified local partners.

➤ ***Engagement with Decision Makers***

Although MDB procurement is formal and transparent, companies enhance their credibility by ensuring their representatives meet with decision makers in the PIUs and the local MDB offices. Developing relationships provides not only the opportunity to market and demonstrate the quality, professionalism and other attributes of the supplier, but the opportunity to get valuable project information and intelligence at various stages of the project cycle. See [Marketing Your Services – Engagement Actions](#).

➤ ***Knowledge and Insight***

At their core, MDB-financed projects are an attempt to provide solutions to development problems. Having a clear understanding of the rationale behind a project, and the policies, economic and political circumstances, allow firms to respond better. Attaining this knowledge and an understanding of the local market entails conducting thorough research into country and sector issues, funding agency strategies and priorities, best practices and approaches, and the relevant stakeholders. Vast resources exist to readily attain most of this knowledge, including the funding agencies' country and sector resources and project documentation.

➤ ***Committed Resources***

Pursuing international development project opportunities requires dedicating time and money that is commensurate with the scope and size of opportunity being pursued. Companies that win contracts have coherent systems for regularly monitoring and pursuing international opportunities and meet regularly with decision makers in the PIUs and the local funding agency offices.

➤ ***Well Crafted, Compliant Proposals/Bids and other Submissions***

Winning contracts is ultimately determined by which proposals receive the highest points after a formal evaluation. Moreover, international development agency procurement guidelines are complex and exacting. Companies that are not familiar with the guidelines or that lack bidding experience often make mistakes that result in less competitive proposals or even outright disqualification. Strong technical expertise and the requisite experience can still lose a bid if companies don't submit well crafted expressions of interest and technically compliant proposals and bids. See [Competitive Bidding](#). Dozens of helpful tips, recommendations and critical success factors can be found in [IFInet's Canadian Success Stories](#).

***Marketing Your Services – Engagement Actions***

At each stage of the Project Cycle, there are numerous engagement activities firms should consider undertaking:

***Pre-Pipeline***

- Participation in policy boards, best practice development and thematic conferences
- Conduct technical presentations to stakeholders on firm's philosophy/approach
- Inform local Canadian trade commissioners of your interest
- Engage with senior borrowing country government officials, influencers and decision makers
- Promote solutions in context of the country's economic and social development priorities

***Goals:** Establish identity and relationships at early stage; encourage your service as viable development solution.*

### **Identification Stage**

- Outreach with local funding agency office, project team members and with PIU officials and relevant government officials
- Keep local Canadian trade commissioners informed

***Goals:** Express firm's interest and commitment at early stage; build relationships.*

### **Preparation Stage**

- Discreet promotion of firm's services and solutions to PIU officials, funding agency team members, including contracted consultants and PIU advisors
- Offer information to funding agency project team and PIU officials on technical issues
- Begin to identify partners and plan formal marketing events
- Conduct technical presentations to borrower on specific solution(s).

***Goals:** Creating awareness and positive impressions of firm's solutions and benefits; reinforce firm's interest and commitment.*

### **Preparation/Appraisal**

- Continued engagement – with partner(s) – to funding agencies, borrower/PIU officials
- Conduct competitor intelligence and preliminary assessment of competitive solution and pricing in anticipation of eventual bid(s)
- Refine ongoing marketing and engagement strategy including key contact engagements

***Goals:** Advance information on project scope, timing; identity of firm well-established*

### **Appraisal/Approval**

- Continue engagement of key project decision makers and stakeholders
- Refine competitor intelligence and competition analysis
- Appeal specs / procurement methods if they appear prejudicial or exclusive

***Goals:** Ensure specifications are 'friendly'*

### **Project Implementation / Bidding**

- Systematically check online [Sources of Bid Information](#) for procurement notices (i.e., General and Specific Procurement Notices)
- Finalize bid strategy; attend any pre-bidding conferences; respond to EOI requests
- Collaborate closely with partner in EOI and bid preparation
- 'Expert' review of bid for compliance
- Attend public bid opening

***Goals:** Get short-listed; Submit fully compliant, high-quality, cost-competitive bid on-time*

**Contract Award**

- Resist competitor appeals
- Expert review of draft contract

**Goals:** *Contract award to firm or partner(s) with good terms*

***Competitive Bidding – Key Considerations***

Bidding processes and guidelines differ from agency to agency. With regard to the MDBs (and many of the other agencies as well), whether the bid is the result of a two-stage process (i.e., a formal prequalification followed by an RFP to short list of firms) or single-stage procurement, some key considerations are as follows:

- Learn what procurement method will be used, ideally in advance of formal tender (this will be specified in the RFP and usually in prequalification notices, but can usually be determined during earlier engagement activities);
- Learn what criteria will be used to evaluate bid and assess proposal preparation implications of each criteria;
- Always attend any bidding conferences and the formal bid openings;
- Assess competition (i.e., their experience, their cost structure);
- Be technically compliant to specifications/TOR. If the TOR are ambiguous, seek clarification;
- Seek budget: research project appraisal documents and other sources for budget and cost information;
- Partnership: Locate local partners or form consortia. This ideally should be done at prequalification stage or earlier. Increasingly, points are awarded in the formal evaluation for local content, including in the form of qualified local partners/consultants and other inputs. Even where it is not explicit, local content is likely to make a bid more favorable. Seek out strategic partnerships with local firms, including with those who have bidding experience.
- Prepare well-written, professionally-packaged proposal that is submitted on time. RFPs often only allow 30 days to prepare and submit technical and financial proposals. Accordingly, firms should be armed with as much knowledge as possible in advance, and proposal management must be efficiently organized to ensure a high-quality submission is produced in short period of time.

If you are submitting a proposal to CIDA, keep in mind the following:

- Ensure yourself that you comply with all the requirements listed in [CIDA 102](#)
- Sign the mandatory requirements.
- When in doubt, ask questions in writing.
- Browse through CIDA's website particularly for contracting information.
- Attend the bidders conference, if one is held.
- Ask for a debriefing after the evaluation of your proposal.

### ***Bidding to Win – Tips on Writing Effective EOIs and Proposals***

Larger-value services contracts are awarded after an international competitive bidding process which is typically comprised of a two-stage process of prequalification followed by evaluation of proposals submitted by short listed firms/consortia.

As indicated in [Identifying and Tracking Opportunities](#) the first step of engaging in the formal bidding process entails regularly tracking the on-line [Sources of Procurement \(Bidding\) Notices](#). *Because notices are published daily, it is advised to check for notices at least 2-3 times per week. Moreover, as EOIs or other submissions are often due 30 days from the on-line publication date, failure to check regularly can result in losing time to submit an EOI.*

#### **Types of Notices in the Bidding Process and Appropriate Responses**

<b>Type of Procurement Notice</b>	<b>Submissions</b>
General Procurement Notice (GPN)	General Letter of Interest
Specific Procurement Notice (SPN) – <i>Request for Expression of Interest</i>	Expression of Interest (prequalification)
Requests for Formal Proposals (usually just to short-listed firms, but occasionally also via advertisement to general public)	Detailed technical and financial proposal

*Formal submissions should be complimented as appropriate by face-to-face marketing efforts (i.e. meetings with PIU staff).* The following describes approaches to these notices and submissions:

***General Letter of Interest*** (in response to GPN). Though not a mandatory requirement, it is recommended to respond to the GPN with a letter of interest.

- Brief one-two page letter
- Generally expresses your interest in project and introduces the firm.
- Ask to be put on any "mailing lists"
- Enclose minimal material/brochures

***The Expression of Interest*** (in response to requests for expressions of interest).

- Cover letter (ideally one page)
- Convey interest and awareness of project/issues
- State why you should be short listed
- State intent to incorporate local experts (or reference them if secured)
- Ask to be short listed!
- Accompanying 4-6 page pre-qualification statement
- Description of Firm and bios of a few key staff (*CVs if requested*)
- Project Experience (highlight relevant ones)
- Language capabilities

- Brochures (or reference website if submitting electronically)
- During preparation of EOIs, firms should research any available project documents on the funding agency websites for contextual information, as well as possible budget indications. Concurrent to formally submitting an expression of interest, firms should consider visiting the executing agency and, if a local partner has not yet been identified, to commence the process of securing local content. Firms should also make local Canadian trade commissioners aware of their submissions.

***Key criteria for short listing consultants:***

- General qualifications/background of the firm;
- Firm's experience in similar work/assignments;
- Firm's previous experience in country or similar countries;
- Language capabilities of the firm's staff;
- Whether the firm will use local consultants.

***The Request for Proposal***

If short listed, the executing agency will notify short listed firms – usually by mail or courier – and will provide the following documents:

- Letter of Invitation
- Contains other short-listed firms
- Indicates method of procurement (i.e., Quality Cost Based Selection, Quality Based Selection, or other).
- Data Sheet
- Estimated person-months for assignment
- Evaluation criteria
- Prescribed Proposal Format. Varies among funding agencies.
- Detailed Terms of Reference (TOR) describing scope and timing of assignment.
- Draft Contract

***The Formal Technical and Financial Proposal***

- Based on review of RFP, analysis of competition and cost, decide 'go' or 'no go'.
- Seek budget; obtain intelligence (*Ideally, qualifying the opportunity should have been done even prior to RFP*)
- Request an extension to submission deadline?
- Recruit and secure project team/partner firms/suppliers (including external subcontracted experts)
- Assign proposal tasks and responsibilities
- Production, graphics, packaging, cover
- CVs (must be formatted to specifications)
- Drafting of proposal (*Key focus on methodology and work plan*)
- Produce technical proposal; review with peers.

- Cost proposal, research project appraisal documents and other sources for budget (if available)
- Prepare financial proposal.
- Produce and submit required number of copies in required format and packages, before deadline.

### ➤ *Proposal Evaluations*

Subsequent to proposal submission, project executing agencies will formally evaluate the technical proposals using the criteria outlined in the RFP, and other evaluation grids.

Typically, key evaluation criteria and their relative weighting can be approximately as follows:

Qualifications/experience of individual team members proposed (CVs)	40pts
Approach and methodology	40pts
Language proficiency (if relevant)	10pts
Local content (use of local consultants)	10pts
	Total: 100 pts

CIDA uses a best value approach in evaluating proposals i.e. the best combination of technical merit, price and aboriginal component. The financial component is opened and evaluated only if the technical component achieves a score in excess of the pass mark of 60%.

<b>Evaluation Criteria</b>	<b>Range</b>
Experience of the Consultant	50-200pts
Methodology	200-450pts
Personnel	250-525pts
<b>Sub-Total</b>	<b>800pts</b>
<b>Financial Component</b>	<b>200pts</b>
<b>Aboriginal Component</b>	<b>50pts</b>
<b>Total</b>	<b>1050 pts</b>

### ➤ *Contract Negotiations*

Negotiating contracts is generally a straightforward process based on standard forms of contract depending on the nature of the contract (i.e., lump sum remuneration, complex time-based, etc.). Firms should focus negotiations on realistic timetables for deliverables, fair terms of payment and schedule, and to ensure clarity as to expectations for deliverables. Consideration should also be given to including in the contract options for add-ons, continuation of services, follow-on services, etc., without further competition.

### *Additional Useful Resources*

- Companies who are new to exporting and doing business abroad should also explore the variety of Government of Canada resources available through [ExportSource.ca](#) including the [Roadmap to Exporting](#).
- [IFInet](#) provides numerous [Business Guides](#) pertaining to specific funding agencies and markets, as well as dozens of [Success Stories](#) outlining the experiences and recommendations of many Canadian firms who have won international development contracts funded by the MDBs and other international agencies.
- IFInet also lists key contacts and resources on its [Canadian Support Network](#) page, as well as links to other [Government of Canada Programs](#) designed to assist Canadians in pursuing international business opportunities.