Procurement of Information Technology and Systems

Progress on Reform Agenda

August, 2001
IT Procurement Reform Agenda

- Resolve Contract and Process Issues
- Develop full SBD document set
- Convert to electronic documentation management
- Develop Web Page for WB IT Procurement
- Expand Technical Guidance
  - Organize advisory function
  - Convert to electronic documents

Resolved and Implemented
- Resolved.
- Pending for Resolution
Intellectual Agenda - Contract Issues

- Accommodate many kinds of Supplier partnerships
- Improve Manufacturer’s Authorization Form
- Allow key subcontractors to contribute to bidder qualification
- Strengthen contracting for Maintenance and Support (TN1)
- Use Standard Incoterms

Resolved and Implemented

- Resolved.
- Pending for Resolution
Intellectual Agenda - Contract Issues

- Rebalance rights and obligations of parties
  - Supplier’s Right to Terminate
  - Limitation of Liability
  - Reimbursement of Taxes
  - Force Majeure (change in law, customs clearance delay)

- Resolved and Implemented
- Resolved.
- Pending for Resolution
Intellectual Agenda - Contract Issues

- Increase flexibility of Software License Agreements
- Allow Multiple bids and Options
- Provide Guidance on Brand names (TN4)
- Improve Payment Terms
- Sort out Adjudication Issue

Resolved and Implemented

Resolved.

Pending for Resolution
Intellectual Agenda - Process Issues

Increase Flexibility in Procurement Packaging

- Allow mix of fixed and variable pricing \((\text{GN2})\)
- Develop guidance on packaging options \((\text{GN3})\)
- Allow multiple bids

Resolved and Implemented

- Resolved.

- Pending for Resolution
Rebalance Conflict of Interest, Continuity Interests

- Introduce continuation option with optional competitive bidding
- Define documentation standards for system design
- Develop guidance on planned continuation strategies.
Reduce Bank role in technical advice, review.
  - Write TOR for Project Steering Consultant
  - Write TOR for Independent Technical Audits
Increase objectivity, credibility in quality evaluation
  - Develop Better Quality Evaluation Process
Improve evaluation of Complex Technology
  - Define single-stage process for product benchmarks and demonstrations

Resolved and Implemented
  - Resolved.
  - Pending for Resolution
Introduce Electronic Procurement

- Start Pilot Project
- Develop Institutional Strategy
- Develop Borrower Guidelines
- Organize Workshop

Resolved and Implemented

Resolved.

Pending for Resolution
Decision Tree: IT Procurement - Current SBDs

Start

What is being procured?

- Straightforward consulting services
  - Use SRFP for Consulting Services

- Complex IT Supply, complex software engineering, system development, or integration services
  - Use SBD for Procurement of Information Technology Products (Off-the-Shelf Supply and Maintenance), Trial Version 1b — 8/01

Buyer open to different technical solutions?

- No
  - Use Single-Stage SBD for Supply and Installation of Information Systems, Trial Version 2c — Issued 8/01

- Yes
  - Use Two-Stage SBD for Procurement of Information Systems, Trial Version 2c — Issued 8/01

As of 6/01
Decision Tree: IT Procurement - Target SBDs

What is being procured?
- Straightforward consulting services
  - Use SRFP for Consulting Services
- Supply of Hardware or Commercial SW
  - Use SBD for Procurement of IT Products (Off-the-Shelf Supply and Maintenance) (ITP SBD)
- Complex IT supply, installation, integration or system engineering procurements
  - Supply & Installation of Complex systems
    - Use SBD for Supply and Installation of Information Systems (ITS SBD)—Single or Two-stage.
  - Systems Engineering services
    - Use SBD for Information System Engineering (ITE SBD)—Single or Two Stage.
Standard Bidding Documents
For IT Procurement

CONTENTS

1. Document Selection Tips
   1 Technical Note 3 - Selection of SBD for IT Procurement

2. IT Products (ITP SBD)
   1 View ITP SBD Publication Note
   2 View Standard Bidding Document (SBD)

3. IS Supply and Installation (IS SBD)
   1 View IS SBD Publication Note
   2 View Standard Bidding Document (SBD)
   3 Download SBD File (Word Document)

4. Information System Engineering (IS SBD - 2-Stage)
   1 View Standard Bidding Document (SBD)
   2 Download 2 Stage SBD File (Word Document)
Information Technology Procurement

This page aims to improve the procurement of Information Technology under projects financed by the World Bank. It provides basic guidance documents and records the ongoing dialogue between the Bank, its borrowers and the IT industry.

We encourage visitors to register to be able to receive news, updates and invitation to future events.

Register
How to Help

- Visit the IT Procurement Page:
  http://worldbank.org/itprocurementforum

- Provide Comments on IT SBD Products

- Provide Comments on Technical Notes