e-Procurement e-Tools project

e-Procurement Online Learning — Rapid e-Procurement Toolkit Website

E-Procurement Forum 2016

Ioulia Tsitsa
George Valassopoulos
Introduction

- **Public procurement**
  - Public procurement expenditure corresponds to a significant portion of a country's GDP (10-25%)
  - Inefficient public procurement can result in inappropriate use of government funds, directly impacting citizens
  - In contrast, proper public procurement operation can offer a series of benefits in the fields of Governance, Effectiveness and Development of Markets

- **Electronic public procurement (e-Procurement)**
  - Governments worldwide embrace ICT to improve their efficiency and effectiveness in public procurement
  - E-Procurement systems can directly contribute to imposing the Rule of Law, increasing Transparency, Accountability, Value for Money and reducing Corruption

- **Electronic Government procurement (e-GP)**
  - An e-Procurement system alone cannot achieve the potential benefits
  - Proper public procurement operation requires an overall national setting for e-GP, including a modern legal framework, appropriate institutional arrangements and capacity, a state-of-the-art e-Procurement system, etc.

- **Country current status**
  - Countries realize the need to improve their financial management and overall governance processes, including those followed for public procurement
  - As such, countries do recognize the need to establish a modern e-GP framework
  - There are several e-GP ongoing initiatives within the ECA region. Some of the countries have already progressed substantially in establishing e-GP, others are taking their first steps while a few are still in the inception phase
Problem

- Significant inefficiencies are observed worldwide in several e-GP implementation initiatives, such as:
  - A lot of misunderstandings on goals and scope for such initiatives
  - A lot of misconceptions created by the diverse e-Procurement systems available in the market, with substantially different terminology, scope/functionality, and technologies
  - Uncoordinated efforts leading to unproductiveness and duplication of work
  - Limited cross-country synergies to share best practices
  - Complex legal framework that hinders progress
  - Lack of direction in achieving organizational readiness to implement and support a well-operating e-GP framework, etc.
The World Bank response

The World Bank along with leading countries and other international financial institutions can act as donors providing expertise and financial support to countries that aim at modernizing their e-GP framework.

As a response to the identified problem, the WB has taken the initiative to create tools aiming at assisting countries to better understand e-Procurement and modernize their overall e-GP framework:

- **E-Procurement online learning course:**
  Online learning material for interested parties to familiarize themselves with e-Procurement and the benefits of e-GP

- **E-Procurement Toolkit:**
  A set of detailed resources including a mechanism for interested parties to create template Terms of Reference for launching their national e-Procurement projects in line with international standards
Who are we

EUROPEAN DYNAMICS

www.eurodyn.com

- Leading IT service provider in the field of e-Government with over 20 years of experience in delivering IT consultancy, development and support services

- Operates internationally as a group of companies, with offices and antennas in Athens, Basel, Brussels, Belgrade, Copenhagen, London, Luxembourg, Nicosia, Stockholm, Jakarta

- Substantial experience in delivering and supporting e-Procurement systems, tools and consultancy/support services for a large number of countries and international institutions, including: Armenia, Belgium, Cyprus, European Commission (EC), Indonesia, Jamaica, Malta, Organization of East Caribbean States (OECS), Poland, Tanzania, UK (England), UK (Scotland), World Bank (WB), Zambia

- Developer of the Electronic Public Procurement System (e-PPS), implementing the full spectrum of e-Procurement functionality, offered either as Commercial off-the-shelf (COTS) product or as a Software-as-a-Service (SaaS)
Project Goals

- **E-Procurement Online learning courses**: aimed at introducing audience to the concepts and main objectives of e-GP and state-of-the-art e-Procurement systems, through five learning modules, which lead to an e-Procurement certification:
  - E-Procurement Preparation
  - E-Procurement Basics
  - Advanced e-Procurement
  - E-Procurement Indicators
  - Incorporating e-Procurement into Public Financial Management (PFM) reforms

- **Rapid e-Procurement Toolkit**: aimed at providing detailed information on needs and requirements when embarking on the establishment of e-GP, through a dedicated website that offers:
  - Documentation covering core topics of e-GP and e-Procurement in particular
  - Mechanism for the creation of template requirements of a state-of-the-art e-Procurement system
E-Procurement online learning course - Overview

www.eProcurementLearning.org

- Consists of five learning modules, following common structure:

<table>
<thead>
<tr>
<th>Topics:</th>
<th>Common structure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- E-Procurement Preparation</td>
<td>- Introductory video, outlining the topic to be presented</td>
</tr>
<tr>
<td>- E-Procurement Basics</td>
<td>- Main content, including interactive features, diagrams and inline questions</td>
</tr>
<tr>
<td>- Advanced e-Procurement</td>
<td>- Self assessment quiz, prompting the learners to evaluate their understanding</td>
</tr>
<tr>
<td>- E-Procurement Indicators</td>
<td>- Summary of the presented learning module</td>
</tr>
<tr>
<td>- Incorporating e-Procurement into Public Financial Management (PFM) reforms</td>
<td>- List of acronyms used throughout the presented module</td>
</tr>
</tbody>
</table>

- Leads to an e-Procurement certification
  - Upon completion of the five learning modules, learners can take the e-Procurement Certificate examination (20 random questions of topics covered in all five learning Modules)
  - Upon successful completion of the examination, learners obtain the “e-Procurement champion” certificate

- Implemented within the World Bank Group’s Open Learning Campus (OLC)
  - OLC: learning platform providing access to development knowledge across all sectors and region
E-Procurement online learning course – Topics covered

- **E-Preparation module:**
  - What is public procurement
  - What is e-Government procurement and how to establish
  - Recommended organizational structure
  - Indicative action plan

- **E-Procurement Indicators**
  - E-Procurement indicators
  - Strategic directions
  - Performance management
  - Calculation of indicators

- **Incorporating e-Procurement into Public Financial Management (PFM) reforms:**
  - What is Public Financial Management (PFM)
  - What is Financial Management Information Systems (FMIS)
  - E-Procurement systems in the context of PFM reforms

- **E-Procurement Basics:**
  - The e-Registration system module
  - The Searching system module
  - The e-Procurement Plan system module
  - The e-Publishing/Notification system module
  - The e-Tendering system module
  - The e-Evaluation/e-Awarding system module
  - Non-functional aspects

- **Advanced e-Procurement:**
  - The e-Reverse Auctions system module
  - The Contract Management system module
  - The e-Catalogue system module
  - The Catalogue Management system module
  - The e-Purchasing system module
  - The Vendor Management system module
  - The Business Intelligence Reporting & Dashboard system module
Rapid e-Procurement Toolkit - Overview

www.eProcurementToolkit.org

- Documents section, covering four essential topics of e-GP and e-Procurement:
  - E-Procurement Preparation
  - Open Contracting Data Standard (OCDS) Implementation Methodology
  - Public Procurement Indicators
  - Guidelines for Conducting Market Analysis for e-Procurement Systems

- Template Requirements functionality, guiding users to quickly formalize their technical requirements for implementing or procuring an e-Procurement system, in terms of:
  - E-Procurement modules
  - E-Procurement submodules
  - E-Procurement requirements
Rapid e-Procurement Toolkit - Documentation

- **E-Procurement Preparation, presenting:**
  - The concept of e-Government Procurement (e-GP)
  - Why and how to pursue the establishment of an e-GP framework
  - The benefits that e-GP implementation projects can offer and a model action plan

- **Open Contracting Data Standard Implementation Methodology, presenting:**
  - The concept of Open Contracting Data Standard (OCDS) and technical overview of the standard
  - A high-level approach for its implementation in an e-Procurement system
  - How it can be incorporated in a new or existing e-Procurement system

- **Public Procurement Indicators, presenting:**
  - The concept of public procurement indicators for assessing countries' e-GP operation against relevant policy goals
  - The different categories of public procurement indicators, along with computational method and target per indicator

- **Guidelines for Conducting Market Analysis for e-Procurement Systems, presenting:**
  - Why market analysis can form a means to better formalize requirements and approach by understanding the ICT market (available e-Procurement vendors / software products)
  - The core principles of a methodology for conducting market analysis
Rapid e-Procurement Toolkit – Template requirements

- Users are able to select the desired e-Procurement functionality, in order to obtain a full set of relevant template requirements, i.e.:
  - Select the required e-Procurement system **modules** (14 modules in total, such as "Catalogues Management")
  - Select the required e-Procurement system **submodules** based on the module selection (65 submodules in total, such as "Catalogue submission")
  - Obtain the e-Procurement system **requirements** based on the modules/submodules selection

- The Toolkit outputs template requirements for an e-Procurement system to support the selected functionality:
  - Requirements can be viewed on screen
  - Requirements can be exported in user-friendly XLS format

The template requirements can be used when procuring an e-Procurement system (i.e. form part of the technical requirements in a bidding “Terms of Reference” document) or when defining specifications for an in-house e-Procurement implementation.
Rapid e-Procurement Toolkit demo

- Homepage section
- Documentation section
- Template requirements section
- Resources section