Timor-Leste World Bank Procurement Plans: A STEP Guide

Read online with charts and updates:
https://risalatconsultants.com/timor-leste-world-bank-procurement-plans-a-step-guide-for-project-units/

In short. Project units in Timor-Leste can use the World Bank's Systematic Tracking of Exchanges in Procurement (STEP) to plan packages, track milestones and exchange procurement documents. The plan becomes useful when its dates reflect technical readiness, access to sites, safeguards, budget and the time needed for approvals and delivery.

Build the plan from the project's delivery sequence

Translate financing into packages

Begin with the financing agreement, procurement strategy and the approved scope of the operation. Map the activities that need to happen before the project can deliver each intended service. Then define procurement packages around the way that work can be specified, bought and managed. A civil works contract, design consultant and operator training assignment may have different selection methods, lead times and dependencies. If the construction package needs completed designs and environmental and social documentation, give those inputs separate dates and owners before entering a tender date.

The World Bank approved US$121 million for the Dili Water Supply Project in 2022. Its appraisal and published procurement documents show how a substantial water investment can be broken into identifiable activities. The appraisal document describes the service objective and project components. The procurement plan is the place to check how those components translate into packages at a particular point in time. Downloaded plans are dated snapshots. For a live decision, the implementing agency should verify the current approved record and any subsequent updates.

The Bank also approved water and sanitation and basic education investments in Timor-Leste in 2020. The HARI'I health infrastructure project provides another example of an investment where construction, equipment and institutional readiness can interact. These sectors pose different questions for a STEP plan. Water works need a technically verified route and a receiving operator. School projects need an implementation calendar that accounts for instruction. Health facilities may need installation to follow successful testing of utilities. Checking those dependencies is more useful for a project unit than comparing headline portfolio totals.

Decide what to bundle and what to buy separately

Packaging changes the market the project can reach and the number of interfaces it must supervise. A single contract can place responsibility for coordination with one firm. Separate packages may widen competition or make it possible to start work on a ready site. They can also leave the project unit responsible for managing dependencies between firms. The procurement strategy should explain the reasoning using evidence from the market, the site and the team's capacity to supervise.

For example, a hypothetical water project can buy network rehabilitation together with new service connections or run two contracts. One bidder may be able to coordinate shutdowns and restoration across both scopes. With two contractors, the agency must name who controls the

shutdown window, who makes good the road surface and who tests the link between the two systems. Price the agency's interface management work when comparing the options. Document why the chosen approach suits the project before updating STEP.

Set up a STEP record the team can maintain

Use one reference across the project file

Assign each package a stable reference and a specific description. Link the reference to its project component, procurement category, market approach, selection method, review arrangement and estimate in the agreed plan. Use the same reference in the schedule, procurement correspondence, evaluation records and contract register. If the project divides a package, preserve the history so that earlier estimates, documents and decisions remain traceable.

Create a milestone calendar from the applicable procedures and the work that must precede them. Allow for drafting the documents, technical and safeguards review, preparation of bids or proposals, evaluation, applicable Bank review, contract signature and mobilisation. Keep planned milestones and actual events distinct. Enter actuals promptly. For items requiring Bank review, plan for submission of a complete package and time to address comments. Local clearance may be necessary before submission, so put that decision on the schedule too.

Give each step an owner and a reviewer

Set out who drafts a record, who can submit it, who can approve a change and who covers an absence. Limit access to what each role needs and follow project procedures for authorising accounts. A procurement officer can maintain the schedule, but the engineering lead should confirm design progress and finance should confirm the funding assumptions. Make the project director responsible for resolving dates that different teams cannot reconcile.

In an illustrative road package, the design team expects to finish in June and the safeguards team expects to verify a sensitive stretch in August. A July invitation assumes that the August work is irrelevant or already complete. The project director should ask whether the unresolved stretch can be excluded without creating a fragmented road or material amendment later. If it must remain in scope, update the dates and reasons through the agreed process. The change should be visible to people managing supervision, cash flow and reporting.

Keep physical and institutional readiness in view

Confirm site access and service arrangements

Before a works invitation, compare the drawings with a site visit and check the interfaces with utilities, land access and existing users. Record which environmental and social instruments and actions are required at each stage, and identify who verifies them under the project's commitments. Some requirements may be linked to particular locations or mobilisation dates. Maintain an explicit record for those dependencies. A single status of ready can hide a stretch where legal access or consultation is unresolved.

For a water scheme, the agency can verify the proposed pipe route, access for equipment and responsibility for shutdown notices. Check whether the utility has agreed to take over the new assets and can fund maintenance. A bid document may need to state how testing, operator training and record drawings will be accepted. For roads, check relocation and access arrangements, maintenance responsibilities and supervision. A procurement plan is more useful

when it reflects the work needed to commission and sustain the investment.

Sequence equipment, people and facilities

The same discipline applies outside civil works. A health equipment package can be delayed by unfinished rooms, unconfirmed power supply or a lack of staff authorised to operate the equipment. An education package can deliver materials before teachers receive orientation or before the languages and formats required for classrooms have been confirmed. These are scheduling dependencies the project can identify with its sector staff.

For an illustrative health facility, enter two linked milestones in the project schedule: the room is accepted against the equipment layout, and supplier installation begins. The procurement officer can then test the proposed delivery period against the actual completion date. Where the project requires a maintenance arrangement, give it an owner and decide whether it belongs in the original solicitation. The objective is to prevent warranties from running down while equipment waits in storage.

Handle changes and contract monitoring

Record the reason as well as the revised date

A credible update explains what happened and what the team did about it. A package can shift because site conditions differ from drawings, prices change, responses reveal a market constraint or the agency needs to revise its requirements. Record the evidence, the implications for scope, cost and review, and the person who approved the next step. Update procurement documents and publish or communicate changes through the channels required for the stage of the competition.

Bring procurement, finance and technical leads together to review milestones at a predictable interval. A useful agenda centres on upcoming decisions and exceptions. Which package will miss a dependent milestone? Which document has been awaiting review, and who can complete it? Which contract has a change request that may alter the next cash forecast? Close each discussion with an action, owner and date. Check at the next meeting whether the action changed the forecast.

Track what happens after signature

The World Bank procurement framework includes contract management resources. Define the responsible contract manager, and set up the records required under the contract and applicable STEP arrangements. Carry forward deliverables, inspection points, payment milestones, notices, variations and final acceptance. A project unit can maintain a concise operational view for field teams while preserving the authoritative record in the approved systems. Avoid asking staff to enter the same milestone in several files with different definitions.

For a works package, compare certified quantities and completion milestones with the baseline schedule. For a consultancy, track whether outputs were reviewed on time and accepted, and whether the named experts were available. For a supply contract, follow testing, commissioning and warranty handover. These measures show whether the original procurement assumptions remained sound and which lessons should inform the next package.

How ministries, public agencies and donor-funded projects can use the plan

Make the first packages a readiness test

A ministry can require a short readiness review of the first packages before procurement begins. Check that each has a defined deliverable, a cost estimate, a named decision-maker and a realistic source of finance. The engineer should confirm the technical inputs and the safeguards lead should explain the remaining prerequisites. Finance can test the expected payment flow against counterpart budgets and the project's disbursement arrangements. Include an indicator that measures service delivery once the contract has been completed.

Use a project health check to identify cross-team delays and a procurement maturity assessment to focus coaching on planning, evaluation or contract management. Choose one issue that can be corrected before a near-term invitation and confirm the change in the plan.

Use a short package checklist at each review: scope signed off, prerequisites dated, estimate current, funds confirmed, clearances scheduled and a contract manager identified. Record one decision for every outstanding item.

Measure the causes of delay

The ministry and financier can review the gap between planned and actual dates by milestone. Distinguish time spent preparing incomplete documents, resolving counterpart decisions, handling external review and waiting on physical access. Examine how delays affect downstream works, service delivery and expected expenditure. A date missed because the agency responsibly identified a major site risk calls for a different response from a date missed because no one owned a routine approval.

Start with a small number of high-impact packages. Compare what changed over one quarter and check that revised dates still connect to the project results framework. Give the steering body decisions that it can take, such as assigning a reviewer, releasing funds for relocation or approving a revised sequencing plan. STEP then supports a management conversation that leads to action and leaves an auditable record.

Frequently Asked Questions

What is STEP used for?

It supports planning, tracking and procurement exchanges for World Bank projects under applicable arrangements.

Is a published procurement plan always current?

A published plan reflects a particular date. Check the latest approved plan and live project records before taking a decision.

What belongs in a package readiness check?

Check technical scope, site and land access, safeguards, available finance, market readiness and the staff responsible for approvals.

When should a procurement plan change?

Update it through the agreed process when evidence changes the package, method, cost or schedule, and retain the reasons.

How can project units link procurement to delivery?

Carry forward the signed contract's milestones, acceptance evidence, payment schedule and management responsibilities.

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