

# Request for Proposal

## Improving Delivery Models Post COVID-19

### 1. Overview

The GI Hub is seeking a suitably qualified consultant or consultants to work in partnership with the Global Infrastructure Hub ('GI Hub') to assist in the delivery of a digital product that showcases innovative models to improve the delivery of infrastructure across G20 countries.

The consultant's role will be specifically focused on gathering and analyzing case studies from G20 member states and synthesizing them into an easy to understand framework.

### 2. Background and context

#### *The Global Infrastructure Hub*

The Global Infrastructure Hub (GI Hub) is a non for-profit organization established by the G20 in 2014. The GI Hub's mission is 'connecting the infrastructure community and sharing insights to facilitate delivery of G20 Members' economic, social and environmental outcomes through more and better infrastructure'. To achieve this, the GI Hub works in partnership across the infrastructure community to develop a full range of knowledge products, to facilitate the dissemination of knowledge and to provide practical tools and support to policy makers, practitioners and other decision-makers within infrastructure.

In 2018, the GI Hub's strategic plan 2019-2022 was endorsed by the G20 members and its business plan 2019-2022 (available at <https://www.gihub.org/news/gi-hub-business-plan-2019-2022/>) was endorsed and came into effect in July 2019.

#### *Context of this assignment*

The business plan identifies four pillars of work on which the GI Hub will focus:

1. Facilitating to connect the infrastructure community
2. Developing data-driven insights for decision-makers
3. Providing practical tools and knowledge for practitioners
4. Thought leadership for better infrastructure

This RFP relates mainly to 3. Providing practical tools and knowledge for practitioners, as well as 2 and 4. It is important to note that this tool will be part of a broader initiative called Infrastructure for Recovery Post-COVID which encompass Infrastructure Tracker, Transformative Infrastructure and Innovative Funding and Financing. The "Improving Delivery Models tool" is aiming to inspire Governments, in a very practical way, on "how" to improve infrastructure delivery for the implementation of national

infrastructure recovery plans. In that perspective, it will complement both the InfraTracker and Transformative initiatives.

## 3. Scope of work

### *Objectives and Scope of work*

The GI Hub aims to deliver a product that showcases the innovative improvements G20 countries have made in recent years to infrastructure delivery models and more broadly how they can deliver quality infrastructure aligned with the G20 Quality Infrastructure Principles<sup>1</sup>.

The post COVID-19 world will see increasingly constrained public budgets and the needs for **green, resilient and transformative infrastructure** meeting the **G20 Quality Infrastructure Investment Principles** is grow even higher. This Tool will give decision-makers, policy-makers and infrastructure practitioners practical examples of solutions oriented “Improvement drivers” to facilitate the implementation of recovery plans. In this perspective, the COVID-19 crisis is a catalyser and an opportunity to accelerate the adoption of solutions that improve the delivery of infrastructure.

The objective of the digital tool is to showcase innovative ways of improving the delivery of infrastructure projects through a range of “Improvement drivers” covering specifically the planning, procurement construction, financing, operation and maintenance stages in order to:

- Improve the efficiency of infrastructure delivery for governments and outcomes for communities (including adequate consideration of environmental, social and governance factors “**ESG**”) and more broadly meet the low-carbon and climate change objectives for the next generation of infrastructure to be developed;
- Evolve the sustainability of the contractual suite for government and industry
- Review contractual treatment of risks, and
- Optimise utilisation of private finance

It is important to note that this initiative/work/product will:

- cover all types of infrastructure delivery models<sup>2</sup>,
- follow an agnostic and neutral approach representing different G20 jurisdictions and regions
- build on existing GI Hub initiatives such as InfraTech, Innovative Funding and Financing, Risk Allocation, and Output Specifications for Quality Infrastructure where relevant
- avoid duplication with existing tools, noting that the GI Hub has been conducting a first desk review of existing reports, roadmap and tools that will be shared with the consultant

It should also be noted that the GI Hub is conducting ongoing stakeholder engagement with select Governments agencies, private sector infrastructure companies, MDBs and International Organisations to assess actual trends and issues on the delivery of infrastructure.

### *Rationale*

The GI Hub is developing this product in response to several trends observed in global infrastructure markets. While not exhaustive, some of the key trends are highlighted below:

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<sup>1</sup> [https://www.mof.go.jp/english/international\\_policy/convention/g20/annex6\\_1.pdf](https://www.mof.go.jp/english/international_policy/convention/g20/annex6_1.pdf)

<sup>2</sup> Not just PPP/Concessions/BOT type with a private finance component but more broadly Alliance, D&C, DBM, DBMO,...

### Government capabilities

- Governments are not always well prepared or staffed to manage complex contractual structures (e.g. PPPs), which can lead to uncertainty for stakeholders including investors and constructors, and adverse outcomes for governments and the public
- A recent [IMF report](#) estimated that 67% of fiscal risks on projects occur prior to construction (due to government actions or inactions) and over 33% of resources are lost in the public investment process on average

### Today's contracts can be too rigid over the long-term in the face of high uncertainty

- Long-term contracting requires certainty, however, the world faces increasing chronic stress and acute shocks, including as a result of climate change, which will alter the way societies function and how infrastructure needs to be built and operated
- The COVID-19 pandemic has impacted the way societies function, including how people use public infrastructure, such as airports and public transport networks
- In addition, technological changes are happening faster today than in many other historical periods, which also affects the way societies function and use infrastructure services

### Some contractors taking on too much risk

- As a result of increased complexity and size of contracts in a competitive environment, contractors are taking on excessive project risk which can be both unknown and unquantifiable in some instances;
- Moreover, the overreliance on early estimates combines with a decision on final budgets at a BAFO stage way before the design work has been completed, can create overwhelming challenges in the cost-estimation process challenging existing procurement processes;
- This has contributed to major contractor insolvencies and corporate decisions to exit some markets altogether

### Private sector investment in new infrastructure projects is declining

- GI Hub's recent Infrastructure Monitor 2020 Report found that while total private investment in infrastructure has increased over the past decade, this increase has been driven by secondary market transactions. Primary market transactions (i.e. new security offerings in either greenfield or brownfield infrastructure projects) have declined.<sup>3</sup>

The market has therefore responded by exploring alternative models and new avenues to utilise private finance:

- Alliance, IPD (Integrated Project Delivery) models, DPC (Direct Procurement for Customers), RAB (Regulated Asset Base), FEED (Front End Engineering & Design) conversion into EPC and various hybrid models are being discussed and adapted to either project circumstances or to improve PPP traditional models.
- MDBs, ECAs and Infrastructure Banks are introducing instruments to improve the overall bankability of projects, including concessional financing blended financing and various forms of guarantees. **Green financing** including sustainability-linked loans together with ESG factors are expected to become main stream features in project structuring<sup>4</sup>.

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<sup>3</sup> [https://www.gihub.org/infrastructure-monitor/?utm\\_source=peremail&utm\\_medium=email&utm\\_campaign=IM-launch](https://www.gihub.org/infrastructure-monitor/?utm_source=peremail&utm_medium=email&utm_campaign=IM-launch)

<sup>4</sup> The GI Hub will provide further information to the consultant on the Innovative Funding and Financing report that is yet to be published.

## Deliverables

The product is targeting to cover ten of G20 member states (with the ten including the following key countries: Canada, France, Italy, Australia, the United States, the United Kingdom, China, Indonesia, India, Brazil and Japan) across economic and social infrastructure sectors.

Specifically, the outputs desired (subject to consultant feedback) are:

- Confirm the key challenges faced in delivering infrastructure through the stakeholder engagement process;
- Identify the key delivery “improvement drivers” (“Buckets”), the sub-categories “type of improvements” and the existing guidance for them in a “solution orientated” tool;
- Develop a **framework** that allows practitioners and less-technical users to navigate examples easily and that is linked to key challenges identified in #1. The framework needs to be able to integrate innovative funding and financing case studies (as well as other existing relevant cases studies from GI Hub previous Guidance such as the Output Specifications for Quality Infrastructure, Inclusive Infrastructure, Contract Management if appropriate). The framework will need to be digitized and the skeleton of the wireframe provided;
- Identify 40 **innovative** examples across G20 member states of the “types of improvements” identified, and create case studies of each example and an impact-effect analysis of the examples;
- A summary appendix of existing and new delivery models that highlights under what circumstances these models best apply
- **Optional**: high-level volume data for “Buckets”

These outputs should be provided in a format that can easily be translated to a digital format. Therefore, a traditional report is not expected. The consultant, in consultation with GI Hub, has discretion as to how best to provide these outputs. The deliverables will be made public on the GI Hub’s website under a Creative Commons Licence.

Developing the digital version of the product is not part of this RFI.

Each case-study of an example should as a minimum explain:

- What the improvement was
- Why and when was it implemented (i.e. context)
- Who were the effected parties?
- How did it help / what was the outcome<sup>5</sup>

The final example template will be agreed between the GI Hub and the consultant.

GI Hub’s current thinking on “types of improvements” is listed below:

- Improving cost and risk management and therefore efficiency and quality infrastructure: Early Contracting Involvement, Progressive-Design-Built, Program-based approaches, re-visiting risk allocation...
- Improving collaboration/aligning objectives to improve sustainability and resilience: early market sounding, collaborative pre-planning, performance-based objectives, energy-efficiency of existing assets...

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<sup>5</sup> The outcome angle, taking into consideration ESG considerations will be an important orientation of this piece of work

- Improving infrastructure capabilities in a constrained post-COVID era: reinforcement of the public engineering work force, revisiting procurement process...

### *Approach and Methodology*

The consultant shall work in partnership with the GI Hub. While GI Hub and the consultant will lead on different elements of the project, GI Hub will support the consultant (and vice versa) where needed, including providing feedback on specifications and design of the outputs, participating in team meetings, introductions to contacts and participating in stakeholder interviews.

The Reference Guide must be user-friendly, and it should include practical recommendations for policy makers and practitioners that are relevant to their geographic location and country development status. The work will be carried out to a high-quality technical standard.

The scope of work in this Assignment will include:

#### *Phase 1 (Inception) – Overview of existing resources, creation of an analytical framework and first list of cases studies*

1. Confirm the key challenges faced in delivering infrastructure through literature and desk researches as well as the stakeholder's engagement process – GI Hub will share with the consultant the initial key findings from interviews; list main existing references on this topic.
2. Identify the key Improvement drivers/topics and develop a framework that allows practitioners and less-technical users to navigate examples easily and that is linked to key challenges
3. Develop and select a first list of 10 cases studies showing/illustrating the Improvement topics identified below

#### *Phase 2 – Produce case studies within the framework, in a format that can easily be translated to a digital format*

4. Conduct further information gathering and stakeholder interviews in line with the approved methodology;
5. Finalise the framework with the Key Improvement topics, Main publication/resources for each, Cases Studies
6. Produce 40 detailed project case studies aligned with the framework
7. A summary appendix of existing and new delivery models that highlights under what circumstances these models best apply

#### *Phase 3 - Consultation and Dissemination*

8. Consultation – As part of the development of the Digital Tool, the Consultant will be expected to support a consultative workshop or webinar with relevant stakeholders to share the framework and gather feedback for incorporation in the final Product. This workshop is expected to be organised during Phase 2.
9. Dissemination - Contribute to communications materials after publication of the Digital Tool in partnership with appropriate actors, likely to include MDBs and other international organisations (IOs). These will include a limited number of blog posts and social media (within six months of the publication of the Digital Tool).

## Timeline

All outputs to be delivered by the Consultant are to be acceptable by the GI Hub. The outputs to be delivered and the payment schedule are as follows:

Deliverable	Description	Timing for delivery, from the date of contract signing	Payment as a percentage of the total fixed fee
<i>The first 10% of the fixed fee will be paid on the signing of the Consultancy Contract.</i>			
Inception Phase	<i>Overview of existing resources, creation of an analytical framework and first list of cases studies (as describe above)</i>	20 February 2021	30 %
Main Content Production phase	<i>Produce 40 case studies within the framework, in a format that can easily be translated to a digital format (as describe above)</i>	15 April 2021	50 %
Workshop	Completion of workshop and incorporation of feedback Final Digital Tool product	15 May 2021	10 %
Dissemination	Dissemination of the Tool	15 June 2021	

## 4. Form of tender

There is no prescribed format for the tender documents. However, the tender must be submitted electronically and must include at a minimum:

- an understanding of the assignment and an outline of the proposed approach and methodology;
- a summary of the bidder's credentials (with more detailed credentials included in an appendix);
- a list of key personnel that will be used for the assignment, with short biographies (the biographies should include past experience and should clearly identify the specialised skills of the team members relevant to this assignment, along with a statement in regard to availability and time commitments during the course of the assignment, with more detailed CVs in an appendix);
- a schedule for the achievement of the timetable set out above in this RfP;
- a commercial offer which details the proposed fixed fee contract price; and
- any proposed amendments to the GI Hub's standard form of Consultancy Contract attached to this RfP.

The tender documents must not exceed 30 pages in total (excluding appendices).

The GI Hub's budget for this assignment, which is to cover all consultant fees and costs, including all disbursements, all staff remuneration and all out of pocket expenses including travel, accommodation and other miscellaneous expenses, is **AUD \$150,000 excl GST**.

### *Language of proposals and deliverables*

All proposals and deliverables shall be in English.

## 5. Criteria for evaluation

The evaluation criteria for the tenders will be based on the following:

Criteria	Sub-criteria
<b>Approach 30%</b>	The bidder's understanding of the assignment and its objectives.
	The proposed methodology for completing the assignment.
	The robustness of the proposed approach, in terms of developing a meaningful and informative tool.
<b>Scheduling 10%</b>	The schedule for completing the assignment in accordance with the timetable set out in Part 3 of this RfP.
	The identification of any areas of concern that could impact the timely completion of the assignment, and proposed mitigative measures in respect of these concerns.
<b>Experience of the Bidder and the Proposed Team Members 30%</b>	Relevance and strength of past experience of similar or comparable work undertaken by the bidder.
	Strength of the team member's skills and experience. Individuals should have substantial experience in regard to (a) knowledge of the issues involved with infrastructure project development and delivery; (b) data sourcing, research and analysis; and/or (c) interviewing skills.
	Access to resources in regional offices and a global presence to access a large number of cases studies
	Knowledge of the international infrastructure landscape and previous experience working for infrastructure related organisations, such as MDBs, would also be beneficial.
<b>Commercial Offer 30%</b>	Competitiveness of the fixed fee offer.

## 6. Procurement timeline

The following timelines must be adhered to during the procurement process (with the deadlines being at 17:00 hours, Australian Eastern Daylight Time [GMT+11], on the dates indicated). Submissions of proposals, and of requests for clarification, received after the deadlines will be accepted or rejected at the GI Hub's sole discretion.

Key timelines	Date
RfP issuance	30 November 2020
Submission of requests for clarification concerning the RfP	8 December 2020
Submission of Technical and Commercial Proposals	17 December 2020
Decision date	11 January 2021
Finalisation and execution of agreement	12 January 2021
Engagement commencement	15 January 2021

### *Terms of engagement*

The engagement will be based on the Hub's standard Terms and Conditions, a draft of which will be sent to shortlisted bidders for comments.

## Further information

All correspondence should be submitted electronically and be directed to: Maud De Vautibault, Director Practical Tools and Knowledge, Global Infrastructure Hub, [maud.devautibault@github.org](mailto:maud.devautibault@github.org), with a copy to [michael.twycross@github.org](mailto:michael.twycross@github.org).

The GI Hub reserves the right, in its absolute discretion and at any time, to cancel, add to or amend the information, terms, procedures and protocols set out in this RFP. No party will have any claim against GI Hub with respect to the exercise, or failure to exercise, this right.