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Preliminary considerations regarding the development of the public procurement standard documents the organization of the training structure and methodology

Training design in a reform environment (approaches, priorities, challenges)

Mahfoud BARADI, SIGMA-OECD, France

Beirut, 9 November 2022



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Training design in a reform environment

A - Approaches to professionalize buyers

- Medium and long term strategic approach (3-5 years)
- Short and medium term tactical approach (0-3 years)

B - Training priorities

C - The challenges to be met

- Mistrust of the services to make them adhere to the new law.
- Lack of resources, especially from local authorities
- Training in a hostile environment





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Exemple 1 : Medium & long term strategic approach



European approach → Recommendation on Professionalization of Public Procurement

Procurement

EXPP, 15 June 2017

DG GROW, Dir. G 'Single Market for Public Administrations'

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32017H1805&from=EN>



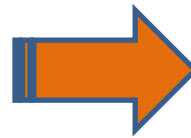
European approach - Professionalisation



The April draft : 10 recommendations

1. Professionalisation strategies
2. Institutional governance
3. Functioning of procurement systems
4. Tools for compliance, transparency and integrity
5. Market knowledge and strategic approach
6. Guidance, tools and templates
7. Competence framework and initial training
8. Lifelong trainings
9. HR management, career planning and motivation
10. Exchange of good practices and support

The June draft : 3 recommendations



I. Defining the architecture for professionalisation of public procurement

II. Support professionalisation of procurement officials

III. Develop systems, tools and lean methodologies to support professional procurement practice



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Challenges and expectations



→ PP subject to increasing expectations and requirements :

- **better value for money**
- **horizontal objectives:** innovation, social, economic and environmental
- **accountability:** minimizing fraud, corruption, inefficiencies and waste

→ Professionalism can make PP more impactful in:

- driving **efficiency and cost reduction**
- delivering **wider government/public outcomes**
- improving **governance, transparency, integrity and compliance**





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Challenges and expectations



→ **Contracting authorities/entities need to develop and implement professionalisation policies aiming in particular to ensure:**

- **skills**
- **quality**
- **sophisticated tools**
- **market & stakeholder engagement**
- **multidisciplinary policy coordination**
- **transparency**
- **remedies**





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Definition of Professionalisation



→ For the purpose of this Recommendation, ‘professionalisation’ is understood very broadly to reflect the full scope of work for procurement officials who are involved in any stage of the procurement process:

- **tasks:** from the identification of need through to contract manage
- **organisations :** be they in the central or decentralised
- **roles:** specifically defined as procurement or merely responsible for certain tasks related to procurement

NOT to create a “profession”

→ but lead to the overall improvement of the competences



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Exemple 2 : Medium & long term strategic approach

The scope of the Directorate of State procurement (“DAE”)

- The decree of 3 March 2016 establishing the “DAE” affirms its inter-ministerial field and defines precisely its four major missions:
 - Inter-ministerial tenders
 - Purchasing organization
 - Purchaser’s professionalization
 - Purchasing tools et e-procurement system
- DAE covers all services of the State, from central administration to regional services and public institutions (agencies)
- The professionalization of the actors in the purchasing process is fundamental to enable the agents to :
 - Achieve the expected savings objectives
 - Conduct the public policies assigned to purchasing
 - sustainable purchases,
 - social integration,
 - access of SMEs to public procurement,
 - innovation purchases

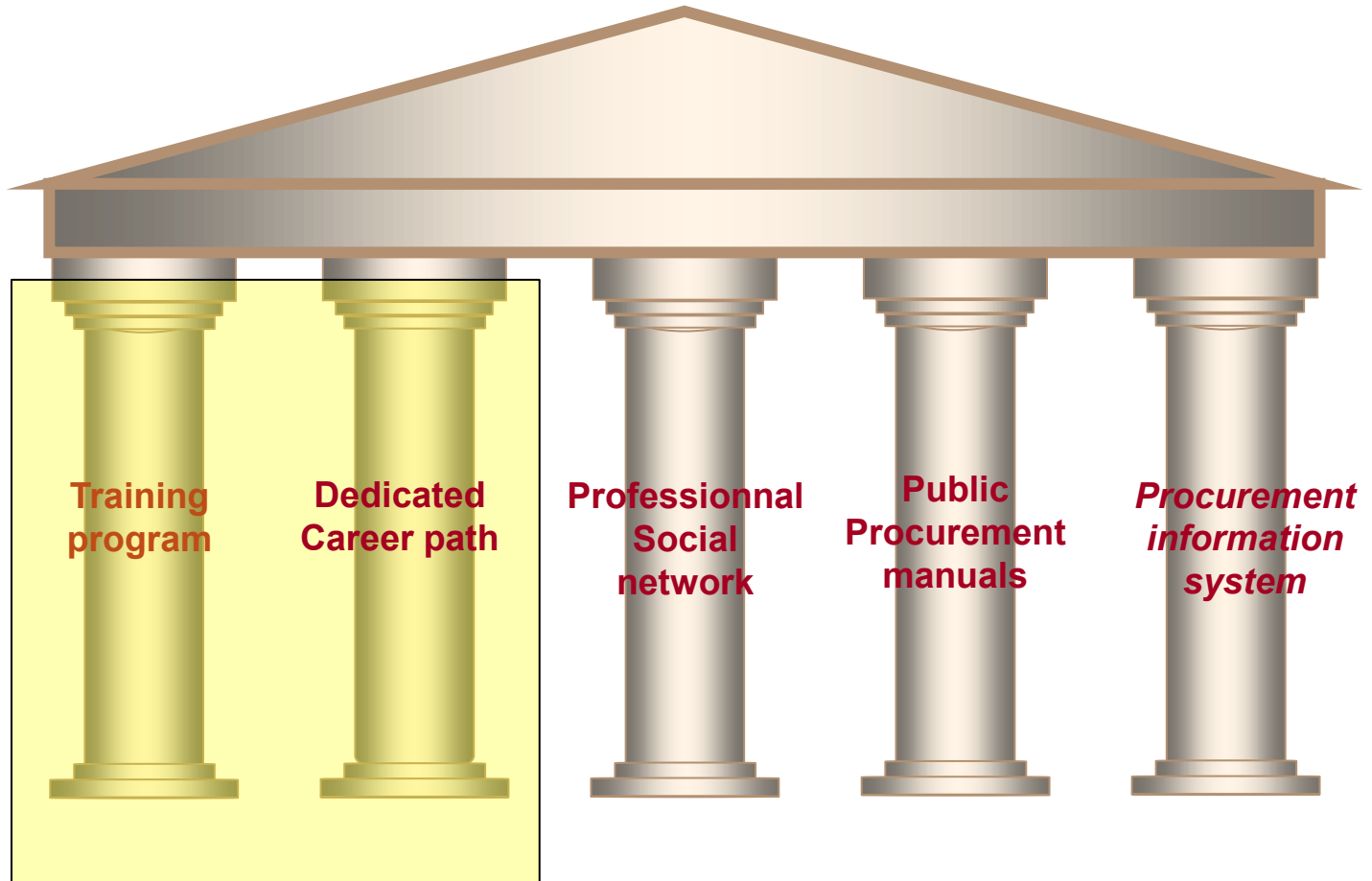




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Which are the 5 pillars of buyer's professionalization ?

Development of public procurement skills is essential for efficient purchasing



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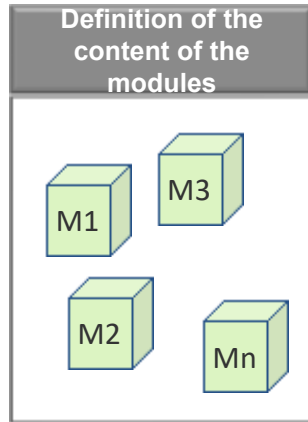




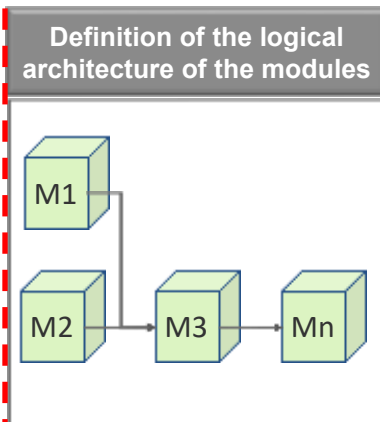
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Steps for building a training catalog

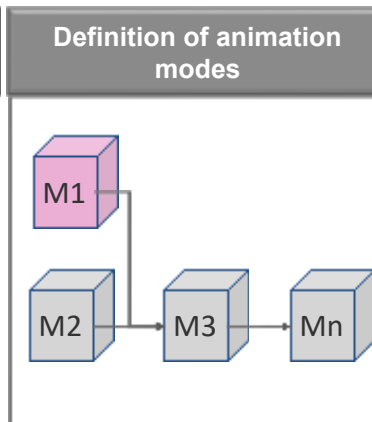
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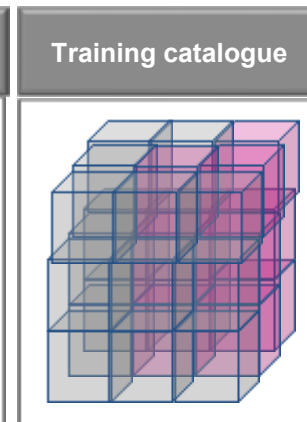
Definition of the topics to be covered by module



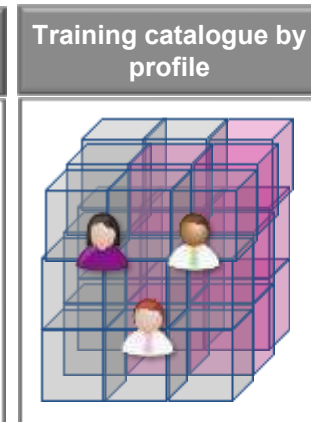
Organisation of the training architecture (curriculum)
E.g.: modules M1 and M2 must be taken before participating in module M3



Selection of an animation mode per module.
Selection criteria are for example: cost, volume, location, importance...
E.g.: Module M1 must be completed on site with a trainer. The other modules can be taken online.



Construction of the training catalogue



Training catalogue available for target populations





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A step-by-step professionalization process

- Step 1 → Inventory of training processes, practices and offerings (2013 ... 2014)
 - Actors in the purchasing process and their respective roles
 - Purchasing processes and required skills
 - Existing training offer in departments (HQ and Regional level)

- Step 2 → Development of the professionalization framework (2015 ... 2016)
 - Interdepartmental Reference Framework (IRF) for Procurement Training
 - Mapping of purchasing skills (DAE prefiguration)
 - Definition of new reference jobs for the establishment of a new purchasing professional (and recognized) family
 - Development of a training strategy that meets IRF objectives and needs of purchasing stakeholders

- Step 3 → Develop a real buyer's career path (2017 ...)
 - Certified training for newcomers to the position
 - New purchasing courses





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Identify the competencies related to the purchasing cycle and/or purchasing procedure



- ✓ Expression of need
- ✓ Functional analysis
- ✓ Definition of the product or service specifications required
- ✓ Drafting of specifications

- ✓ Inventory and analysis of the supplier market
- ✓ Be on the lookout for new technologies
- ✓ Market positioning

- ✓ Determination of optimisation levers
- ✓ Risk analysis
- ✓ Calculation of costs and estimation of benefits
- ✓ Definition of the form of the contract
- ✓ Definition of the consultation process

- ✓ Launch of the call for tenders
- ✓ Tender opening and comparison of proposals
- ✓ Technical and operational analysis

- ✓ Negotiation strategy
- ✓ Identification of operating margins
- ✓ Conduct of the negotiation
- ✓ Choice of supplier

- ✓ Follow-up of the contract
- ✓ Relationship management
- ✓ supplier
- ✓ Creation and updating of purchasing performance indicators

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Identify cross-cutting skills related to the purchasing cycle and/or purchasing procedure

Knowledge of the company

- ✓ Presentation of the context
- ✓ Description of organisational models

"The 'Beaba' of public procurement

- ✓ Framework and definition of a public contract
- ✓ Public Procurement Law
- ✓ Definition of a public procurement contract

Marketing of the purchasing function

- ✓ Presentation of the purchasing function and its challenges
- ✓ Public speaking

Management of purchasing and compliance teams

- ✓ Management and HR management
- ✓ Presentation of the main reporting tools

Responsible purchasing

- ✓ Objectives and challenges of sustainable procurement
- ✓ Regulatory context for procurement

Cross-functional project management

- ✓ Principles and methodologies of project management
- ✓ Management of a purchasing file in project mode



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Example of a module sheet on public procurement basics

Objective of the training



- To have the basic knowledge required to exercise the profession of public purchaser
- Identify the issues related to public purchasing: its strategic importance, its economic impact
- Know the content of the different consultation documents
- Identify the main tools for managing public procurement

Content



- Presentation of the main principles of public procurement regulations and the concept of public procurement
- Context of public procurement and its challenges
- Strategic importance of the purchasing function in an organisation
- Key steps in the procurement process
- Conduct of procurement procedures
- Choice of suppliers: selection of applications and choice of tender
- Financial performance of the contract, terms of settlement and payment of subcontractors
- Dematerialisation and innovative practices in public procurement

Durati on



- 5 days

Teaching methods



- Presentations and real-life examples
- Case studies
- Exchanges and provision of summary sheets

Practical information



- Contact:
✓ Xxx.yyyy@zzzz.gouv.fr

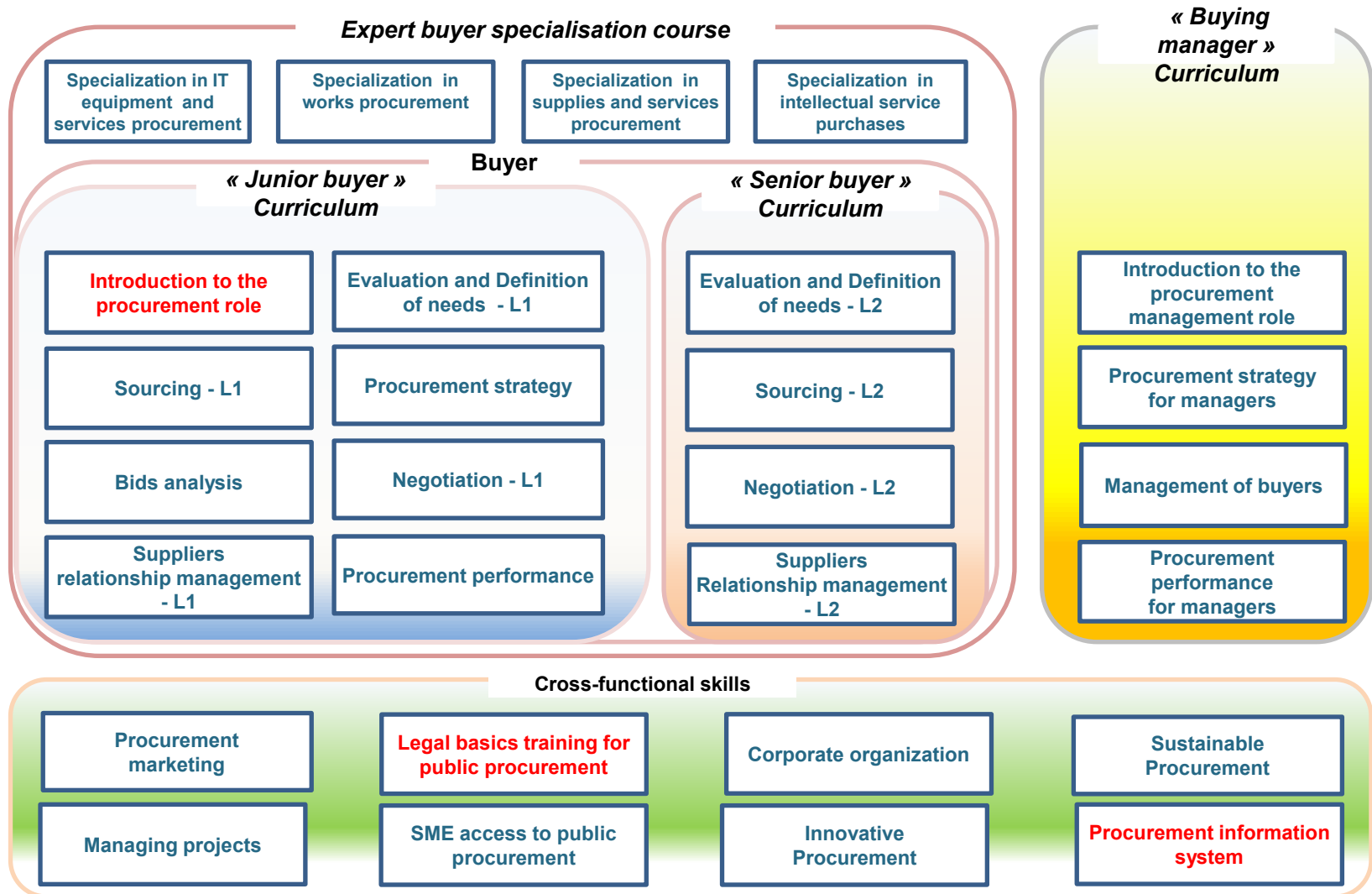




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Example 3 of a training catalog and priority modules

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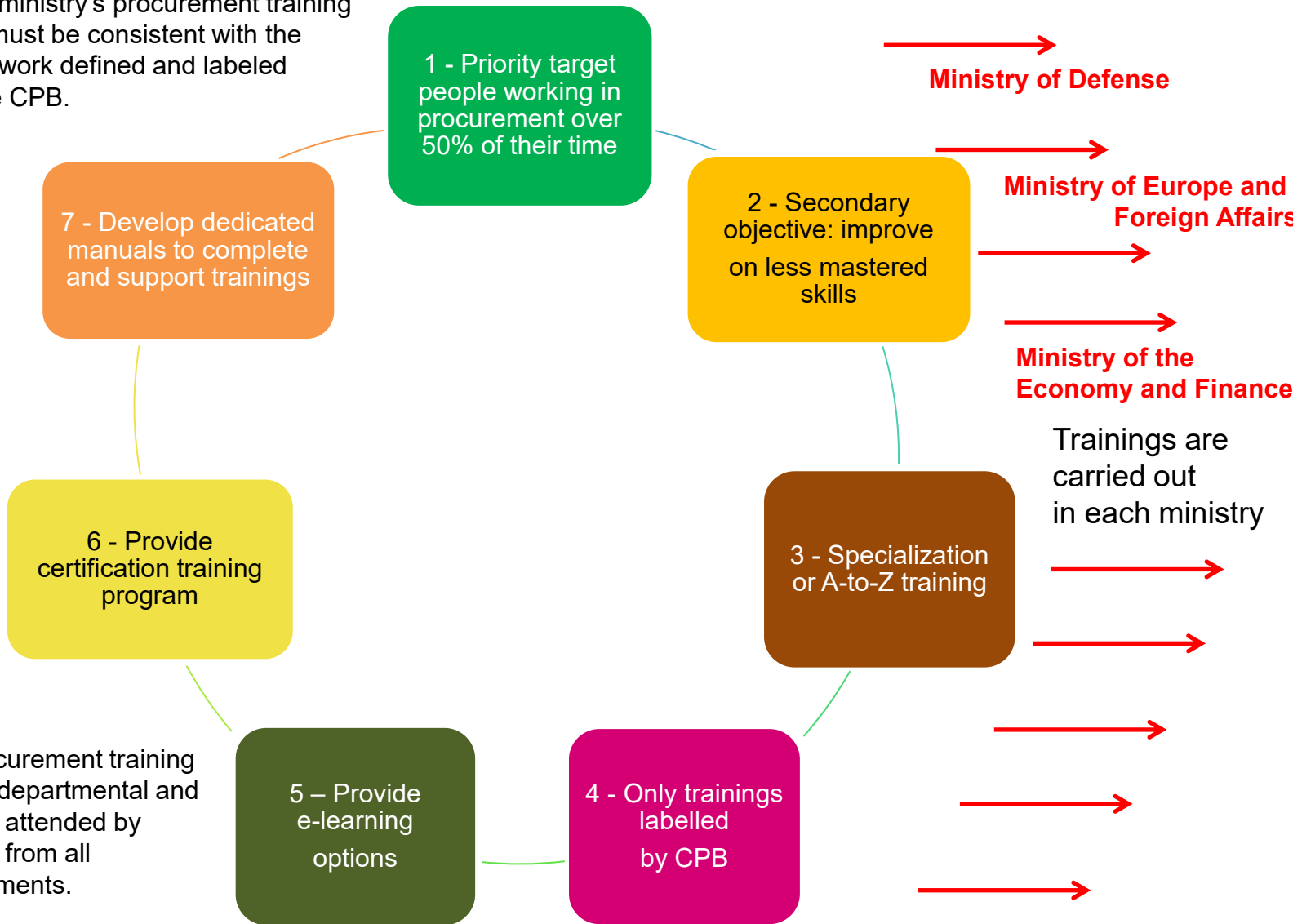


Exemple 4 of training strategy for state buyers



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Each ministry's procurement training plan must be consistent with the framework defined and labeled by the CPB.



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All procurement training is interdepartmental and can be attended by buyers from all departments.





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Develop a real buyer's career path

Professionnal « Purchasing » family

Procurement manager

Manage, implement the procurement policy according to the according to their performance objectives

Buyer

Make sure that procurement meets the qualitative and quantitative needs of services and ensure the performance of procurement

Procurement expert advisors

Advise and bring expertise to the buyers on expert issues (sourcing, negotiation, social and environmental responsibility etc.

Public Procurement writers

Implement public procurement procedures and advise buyers on the legal risks and / or benefits of the public contract

Contract manager

Managing contracts and the orders of goods and services

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MINISTÈRE DE LA FONCTION PUBLIQUE

ÉDITION 2017

Répertoire interministériel des métiers de l'État

FP2ACH	Achat
FP2ACH01	Responsable achat
FP2ACH02	Acheteuse/Acheteur
FP2ACH03	Conseillère/Conseiller en ingénierie d'achat
FP2ACH04	Rédactrice/Rédacteur de la commande publique
FP2ACH05	Approvisionneuse/Approvisionneur achats

ACHETEUSE/ACHETEUR

22 ACHAT

DÉFINITION SYNTHÉTIQUE

Procéder aux achats de toute nature en vue de satisfaire les besoins qualitatifs et quantitatifs des services et contribuer à la performance des achats.

ACTIVITÉS PRINCIPALES

- **Élaborer ou participer** à l'élaboration des stratégies d'achat et les mettre en œuvre
- **Participer**, en liaison avec les prescripteurs et les approvisionneurs achat, à la définition du juste besoin
- **Rédiger** les éléments du dossier de consultation relatif à l'expression du besoin et du choix du fournisseur
- **Analyser, négocier et sélectionner** les offres
- **Piloter** des projets achat et suivre l'exécution des contrats
- **Mesurer** la performance achat
- **Mener** la veille économique, notamment en analysant les marchés fournisseurs
- **Préconvoquer** les marchés disponibles auprès des utilisateurs et mesurer leur satisfaction



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Feedback on the french professionalization program implemented

Difficulties encountered

Key success factors

Strong political support & recognition of purchasing professions

Resistance of services to project management training

Broad consultation of stakeholders (ministries, training operators, etc.)

Moving from a legal to an economic vision of purchasing

Harmonization of content through CPB labelling

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Exemple 3 : Short & medium term tactical approach (0-3 years) → implementation of a skills map

1. Objectives of the survey on purchasing skills
 - **To establish the state of play of the skills of the actors of public procurement** in a context of public procurement reform.
 - **Identify the wishes and prioritization of training needs** from the point of view of the beneficiaries.
 - **Analyze the results to build a realistic and relevant training plan.**
 - **To build a network of the Lebanese public procurement actors.**





Exemple 3 : Short & medium term tactical approach (0-3 years) → implementation of a skills map

2. Presentation of the survey

- **Target** : Institute of Finance Public Procurement Authority, contracting authorities (ministries, public companies, local authorities, etc.)
- **Response mode** : online questionnaire to be filled in electronically, mainly via a PC or even a smartphone.
- **Response time** : about 5 minutes
- **Headings and questions to be established** :
 - Identification of the respondent
 - The profile of the respondent
 - His/her level of competence in public procurement on a declarative basis.
 - Identification of the training courses already taken and those prioritized for the future.



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Exemple 3 : Short & medium term tactical approach (0-3 years) → implementation of a skills map

3. Deployment schedule

- **D of decision** : Decision making on the mapping survey
- **D + 1 month** : Development of a questionnaire
- **D + 1.5 months** : Consultation and validation by IOF
- **D + 2 months** : Wide deployment by IFM to the target audience to obtain the maximum number of responses.
- **D + 3 months** : Analysis of the results in order to develop the training plan.





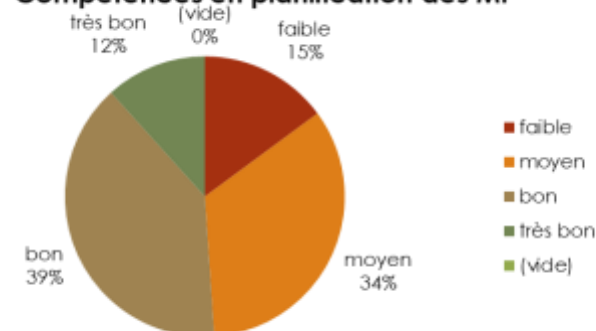
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Exemple 3 : Short & medium term tactical approach (0-3 years) → implementation of a skills map

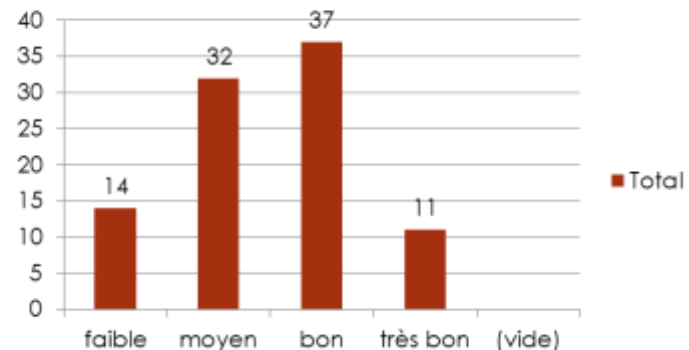
4. Analysis

- An analysis by major blocks of competencies :
 - **Block 0 - institutional framework** - average of the 2 core competencies
 - **Block 1 - PM planning** - average of the 2 core competencies
 - **Block 2 - FCS PPprocess** - average of 20 core competencies
 - **Block 3 - IP PP process** - average of 6 core competencies
 - **Block 4 - PP Execution** - average of 11 core competencies
 - **Block 5 - PP Archiving** - average of 3 basic skills
 - **Block 6 - use of std doc.** - average of 6 basic skills
 - **Block 7 - International Donor Procedure** - average of 4 basic skills

Compétences en planification des MP



Compétences en planification des MP



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Example 4 of training priorities in a reform context

Priorities derived from lessons learned from several public procurement reforms in Europe and North Africa

- **PPL awareness seminar or webinar for all buyers and contracting authorities**
- **Training on the fundamentals of public procurement** (including a part dedicated to the fight against corruption):
 - The Purchasing Function: Principles, Stakes and Contributions
 - The Purchasing Function within the State
 - The Public Buyer
 - The legal framework of public procurement
 - The Purchasing process
 - Definition of the types and nature of purchases
 - Identification of internal stakeholders
 - **Cross-functional skills and ethics**
 - Sustainable development and innovation
- **Training in public procurement tools**
- ... to be defined by IOF at the end of the needs assessment





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Training priorities in a context of reform Example of a MCQ on ethics in procurement

	True	Fake
I have the right, on my own behalf or on behalf of a third party, to engage in commercial transactions with suppliers and subcontractors that have nothing to do with my professional mission	<input type="checkbox"/>	<input type="checkbox"/>
I have the right to invest directly or indirectly in the capital or debt of a supplier or subcontractor that has a relationship with my institution	<input type="checkbox"/>	<input type="checkbox"/>
I have the right to meet different suppliers as part of buyer sourcing	<input type="checkbox"/>	<input type="checkbox"/>
I am allowed to receive gifts of small value and I keep them for myself without telling my superior	<input type="checkbox"/>	<input type="checkbox"/>
I am invited by a supplier to events on a frequent basis and I go there after getting approval from my superior. I have the right to help this supplier to better position itself in a market compared to other suppliers.	<input type="checkbox"/>	<input type="checkbox"/>
I have the right to give my home address to a supplier to send me a Christmas present	<input type="checkbox"/>	<input type="checkbox"/>
I have the right to disclose to other competitors information received in the course of a consultation about a supplier	<input type="checkbox"/>	<input type="checkbox"/>

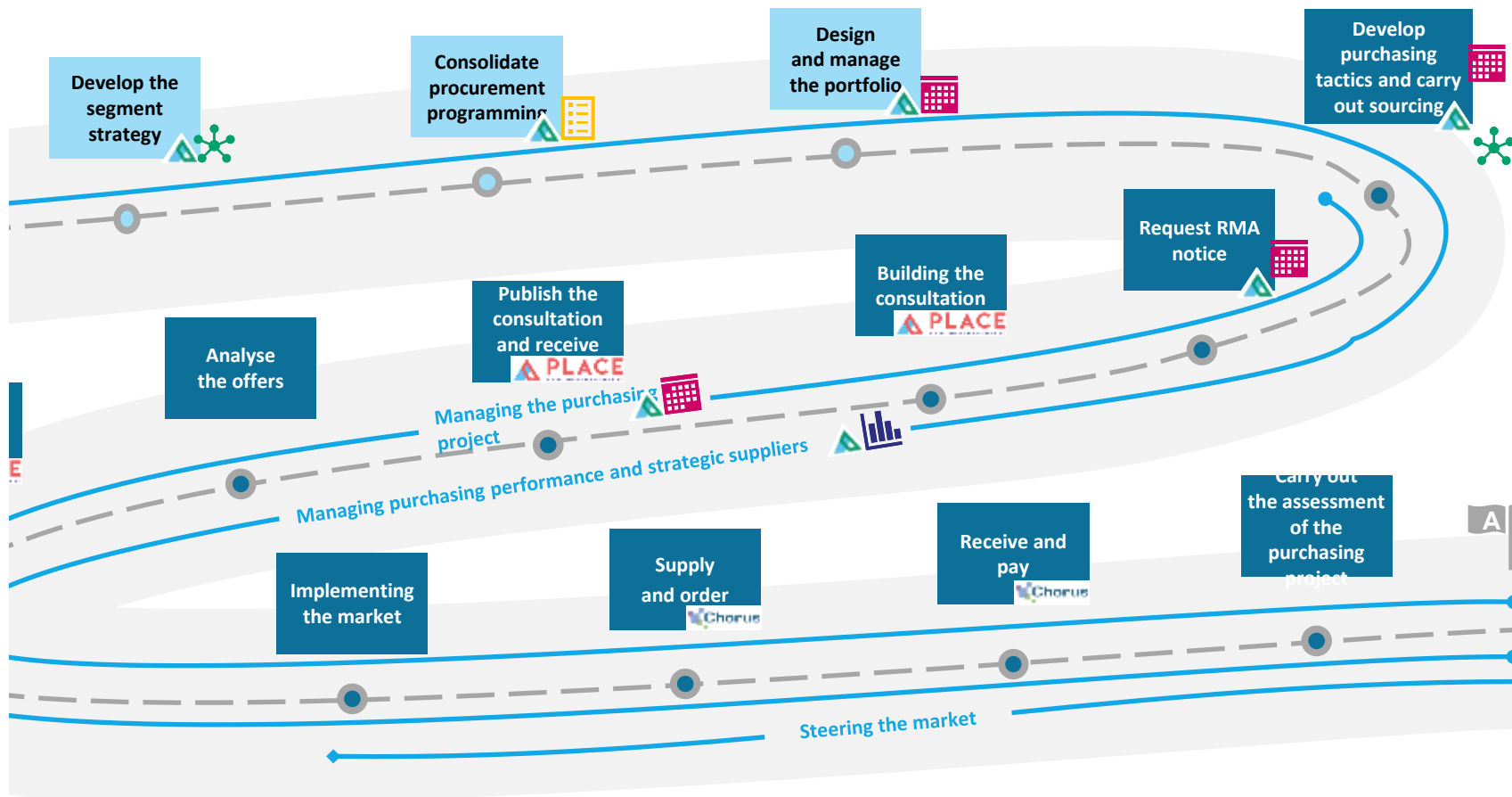


Training priorities in a reform context Example of a training course on a purchasing information system



BUYING PATH APPACH

How does APPACH fit into the purchasing life cycle? The pathway below is intended to model purchasing activities, specifying those that can be carried out in APPACH.



Caption:

- Strategic process
- Steering process
- Business process



Applications that support processes

- Programming
- Planning
- Sourcing
- Performance

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APPACH



Training in the Planning tool

Modules: project creation in planning, tactical purchasing, PFRA notification, RMA validation & assent, APPACH-PLACE interface

Introduction

APPACH: Context and scope of the Planning & Performance bricks;
New in APPACH

Tool training Performance

Modules: Business reminders, entering performance into APPACH, validation & audit, steering & reporting, progress action

Conclusion

To go further;
Evaluation of the training session

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Potential challenges

- **Distrust of the services Vs getting them to adhere to the new law**
 - Implementation of a programme involving all public purchasers
 - Implementation of quick wins on procurement with return of gains to contracting authorities
 - Train trainers and make them ambassadors for the new law

- **Lack of financial resources, especially from local authorities**
 - Demonstrate the value of public procurement, and in particular framework agreements (FA) , for making savings
 - Public procurement means opening up to competition and supporting local businesses

- **Training in a human environment with potential conflicts of interest**
 - Require contracting authorities to train their staff
 - Make the release of funds conditional on the training of buyers
 - Provide tutoring or coaching on purchasing and public procurement





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Thanks you for your attention

