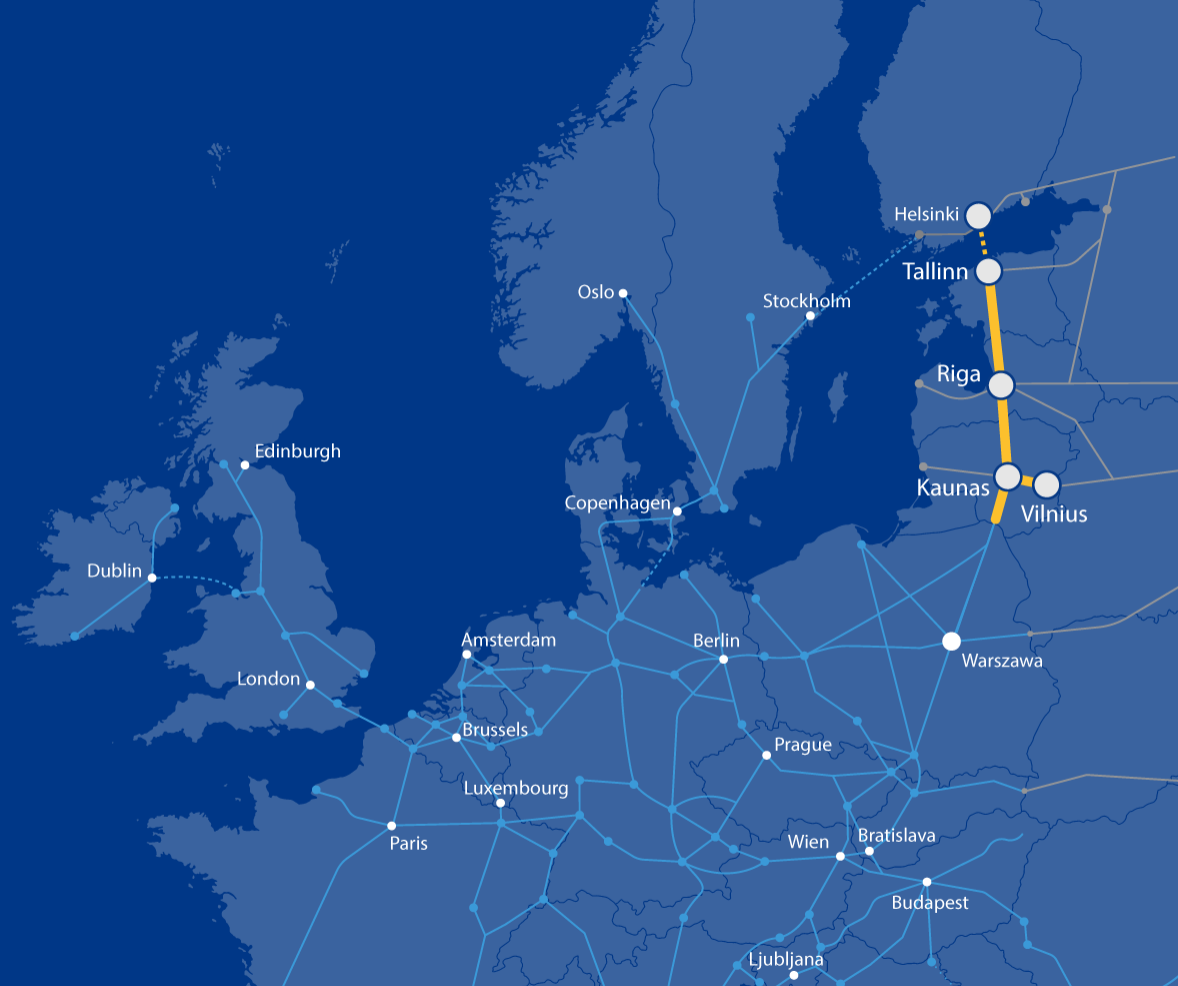


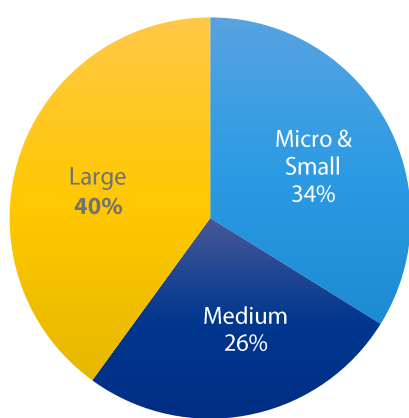
Market Outlook Survey

Kristjan Piirsalu
Chief Procurement Officer

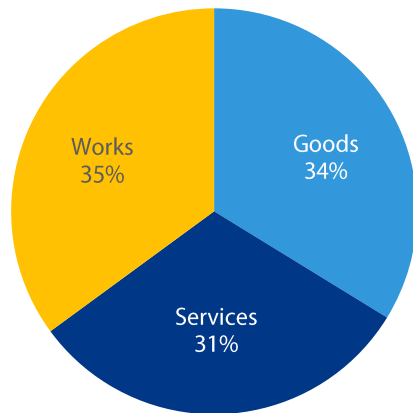
06th May 2021



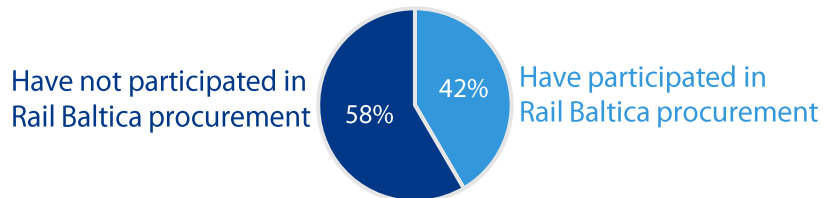
Market Outlook Survey Undertaken in Q4 2020



Company Size



Main Focus



77 participants
from 19+ countries

- 34% Baltic
- 64% Non-Baltic

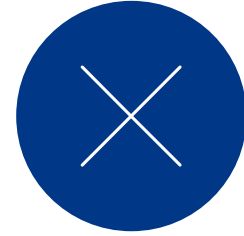
COVID-19 Impact Experienced



**Suppliers have
requested to improve
payment terms**

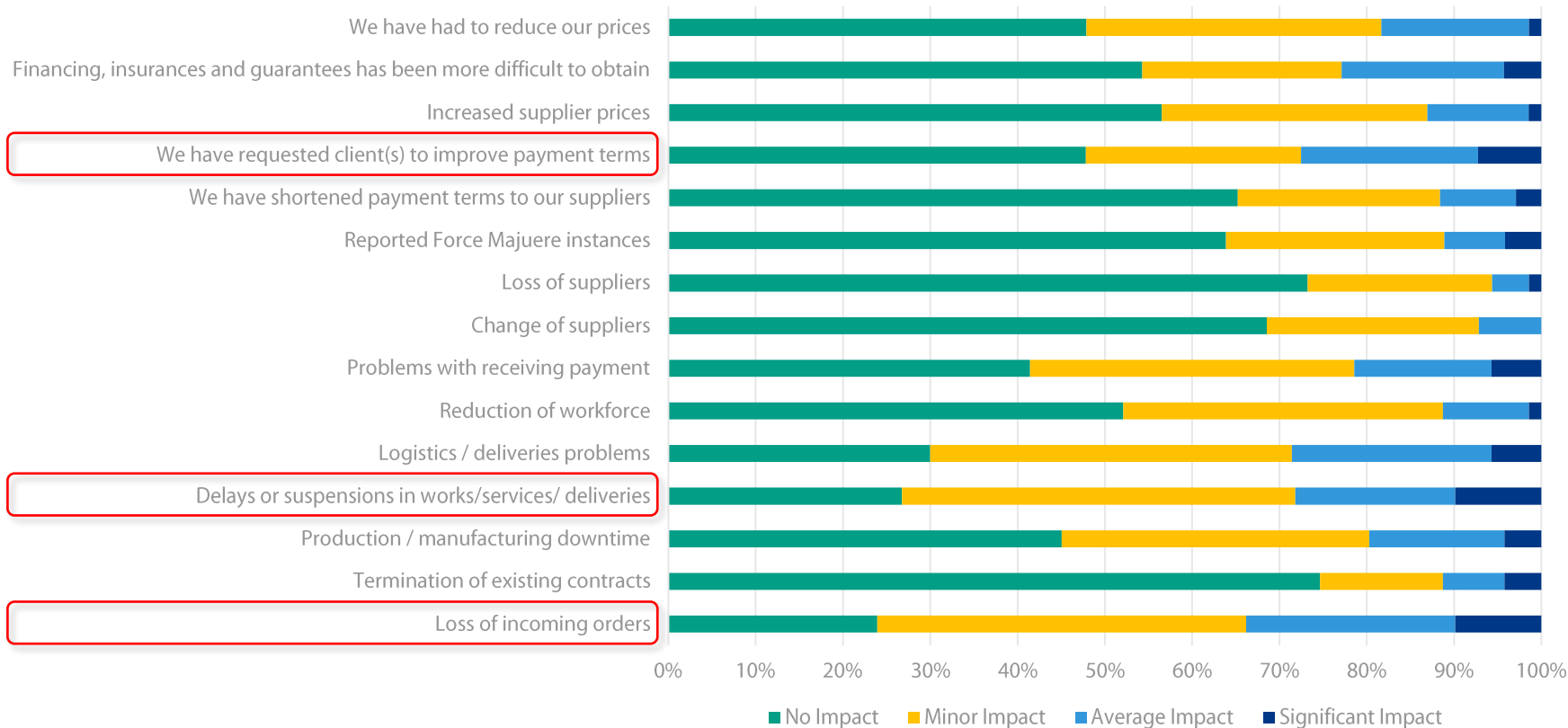


**Have delays or
suspensions of works /
services / deliveries**



**Have lost incoming
orders**

COVID-19 Impact Experienced



Predictions for next 12 months



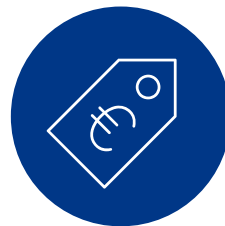
**Will request clients to
improve payment
terms**



**Will have delays or
suspensions of works /
services / deliveries**



**Financing, insurances
and guarantees more
difficult to obtain**

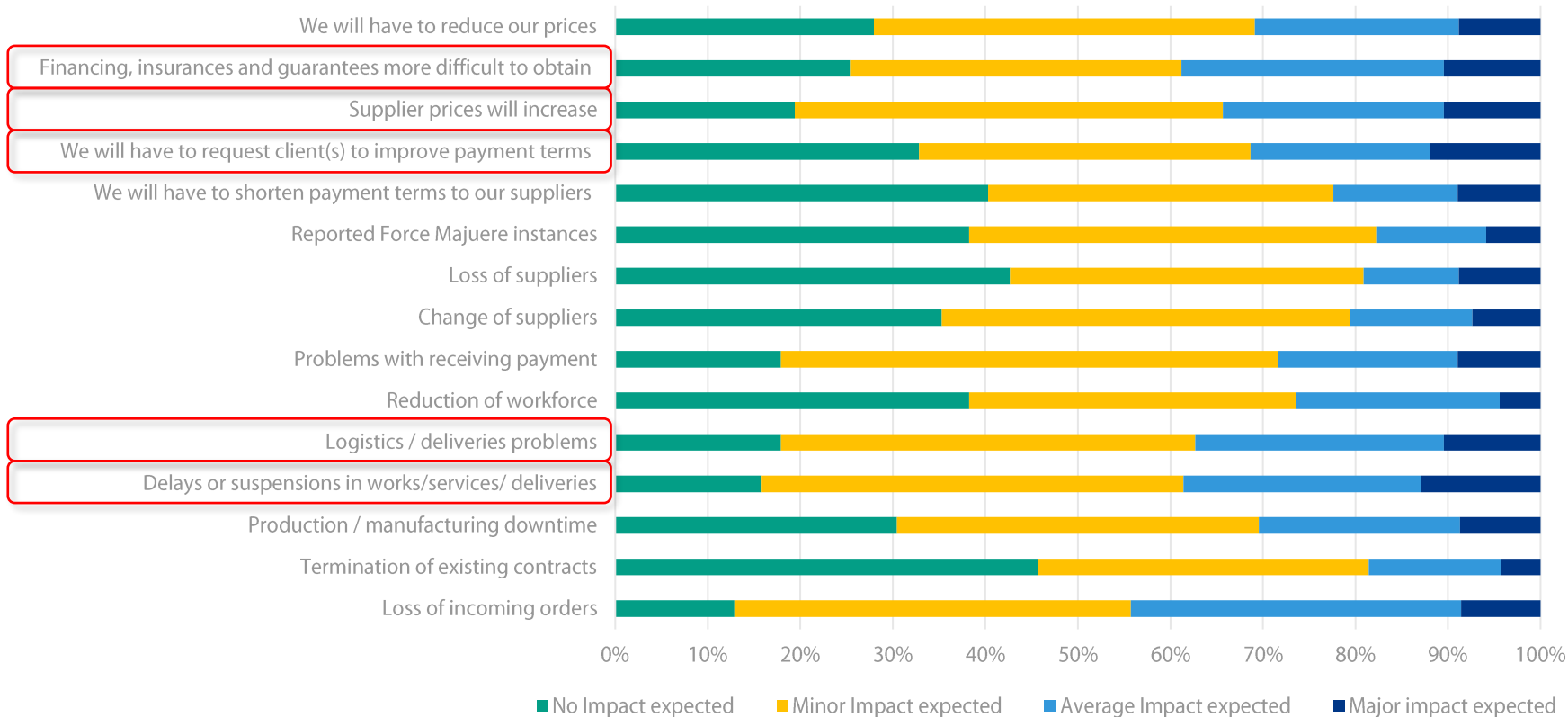


**Supplier prices will
increase**

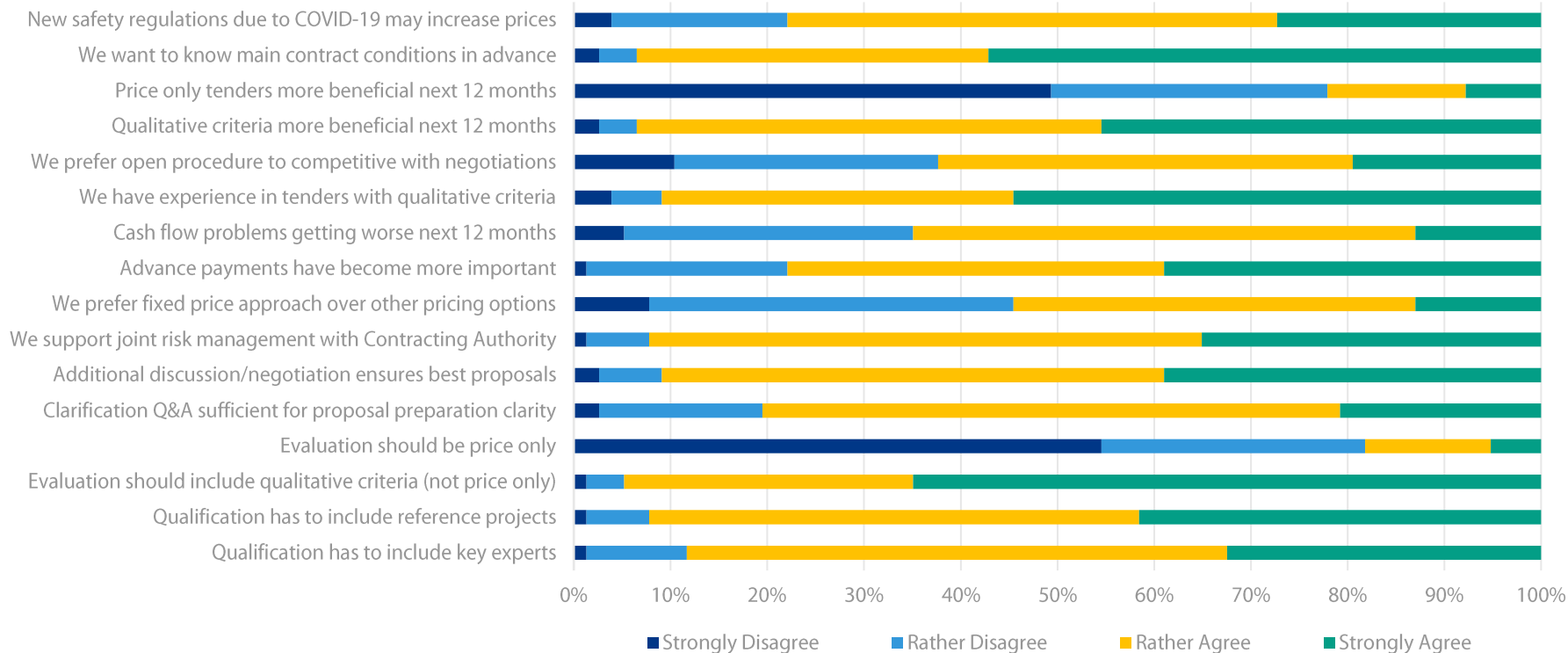


**Logistics / deliveries
problems**

Predictions for next 12 months

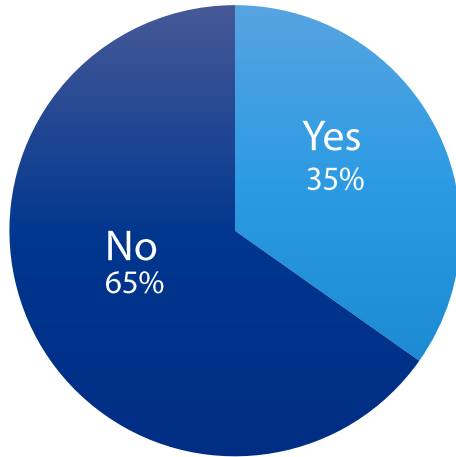


In light of the current market environment (including the COVID-19 impacts), going forward:



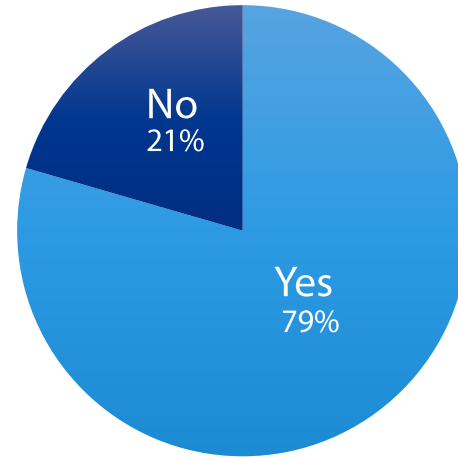
Construction Market & Supply Market Preference for Material Supply

We prefer Contracting Authority's supplied main free issue construction materials, such as rails, sleepers, ballast, turnouts etc.



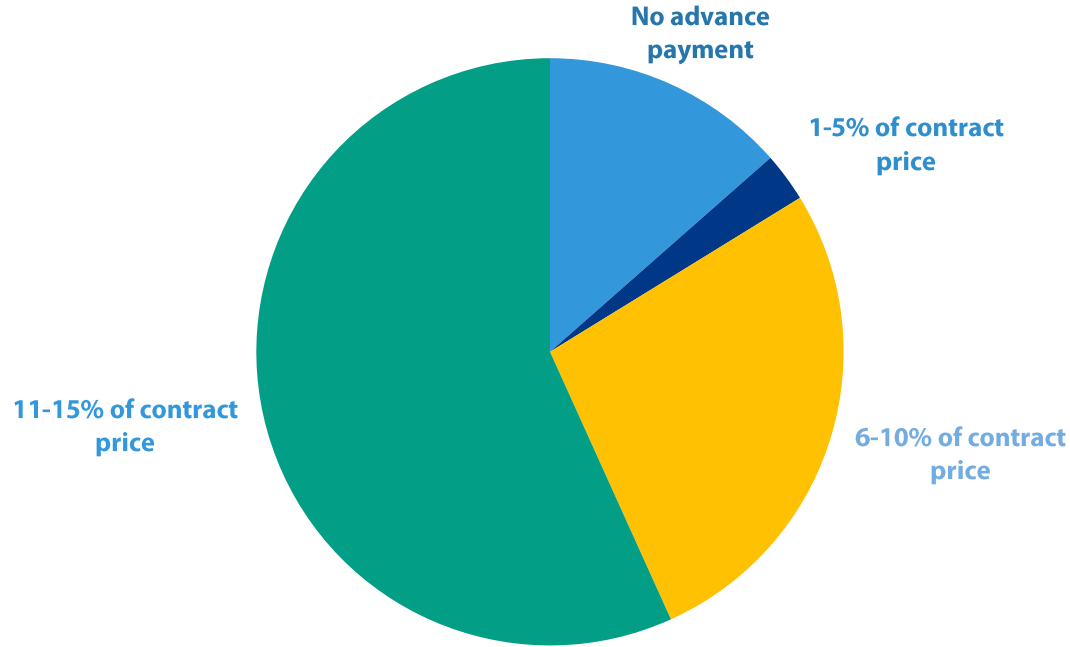
Construction Market

We prefer to supply materials in a consolidated approach via the Contracting Authority (not procured separately by each Construction Company)?

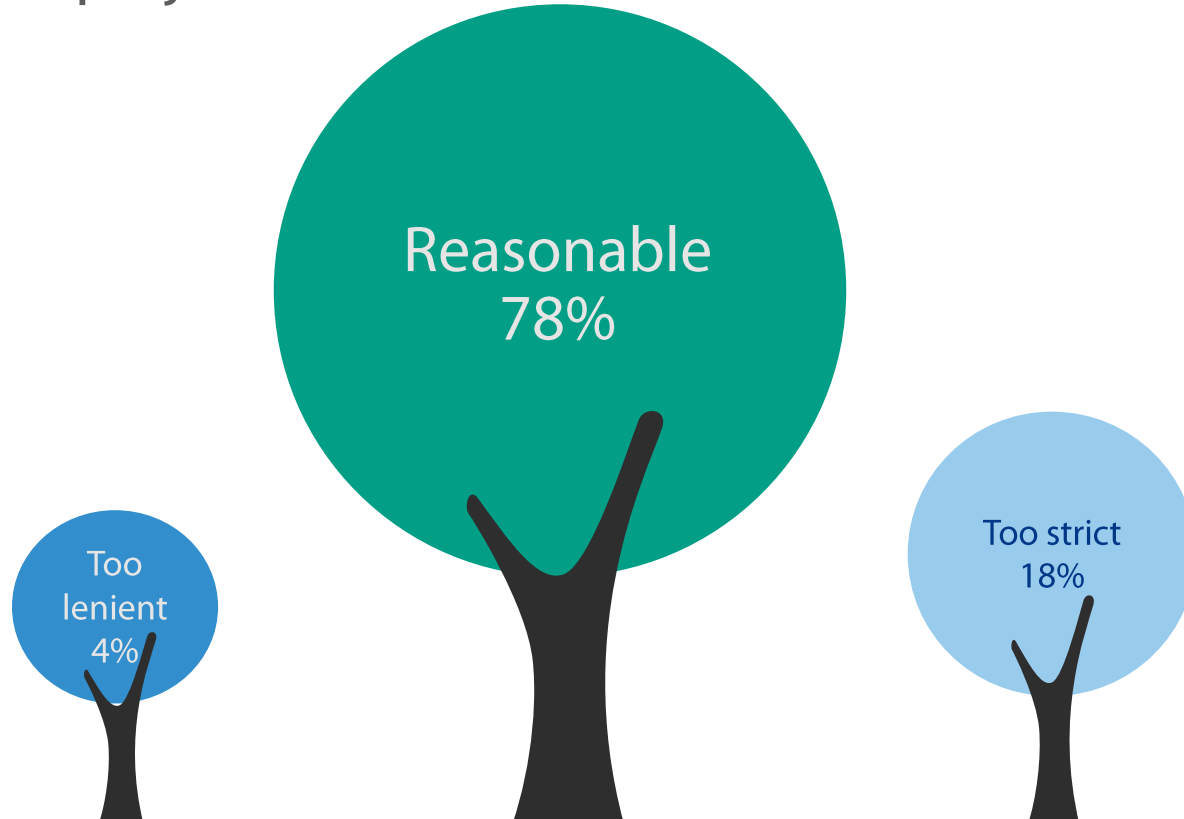


Supply Market

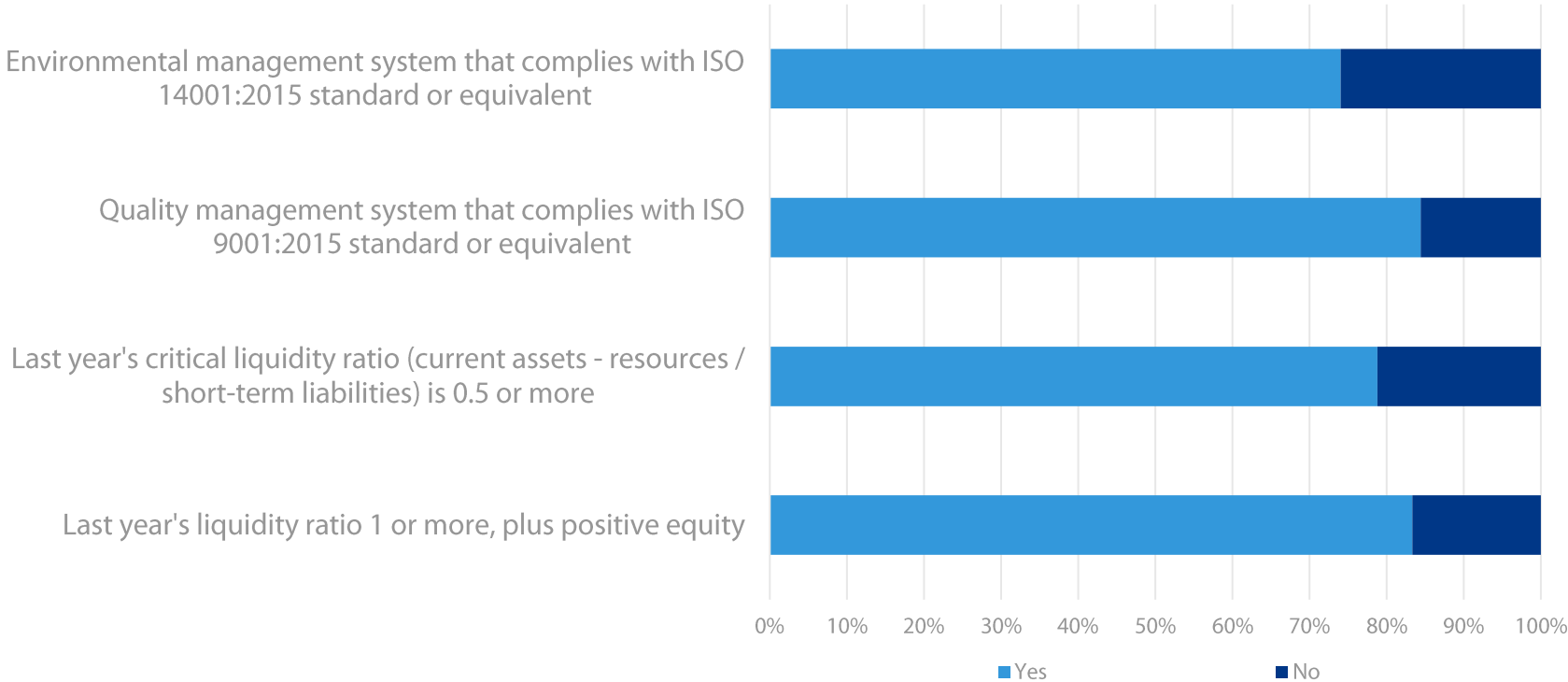
Supplier preferred proportion of contract sum for advance payment



Are the minimum qualification requirements in the "Common Procurement Standards and Guidelines for the Rail Baltica project" reasonable?

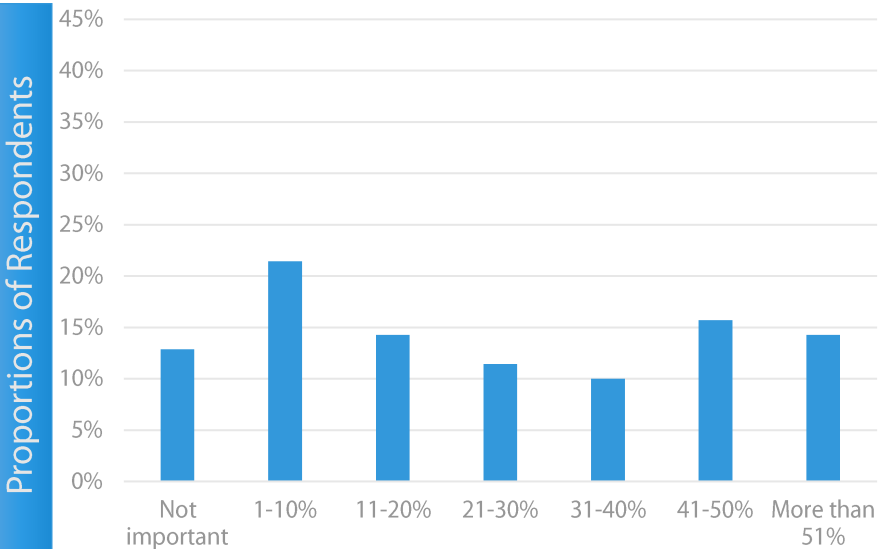


Ability to Meet Qualification Requirements

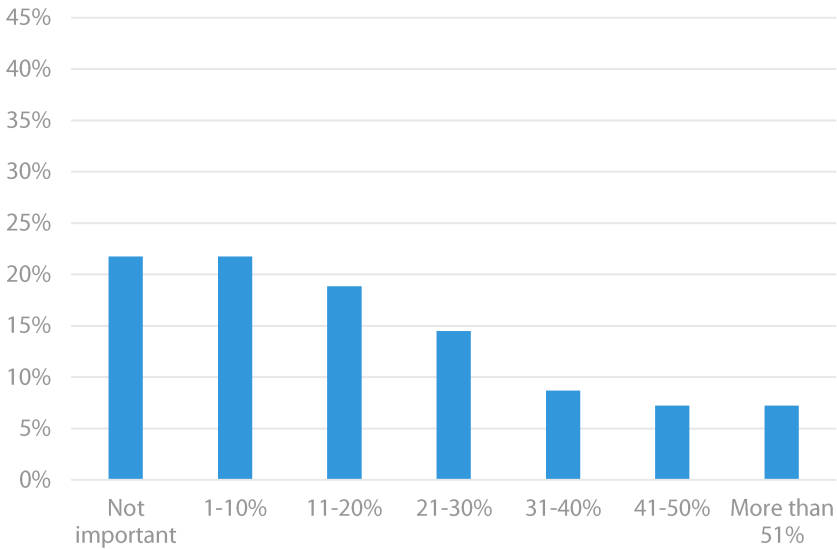


Supplier Preference on Evaluation Criteria proportions

Description of construction works methodology / service provision methodology



Description of risk mitigation

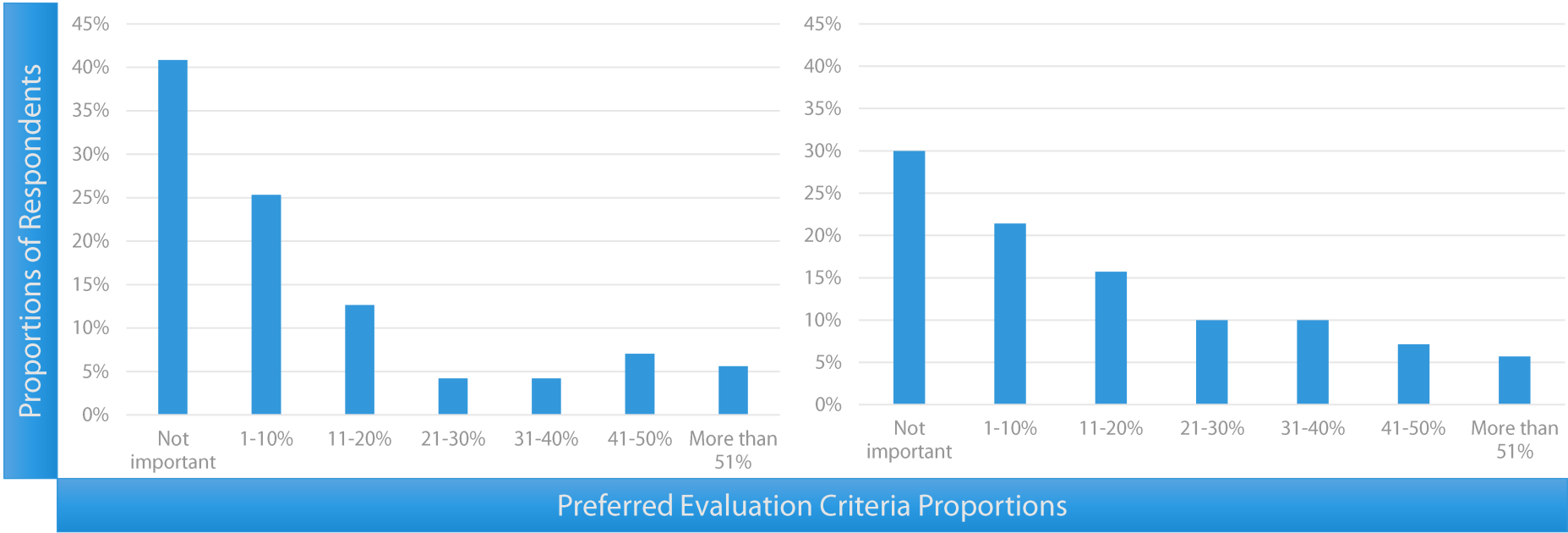


Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

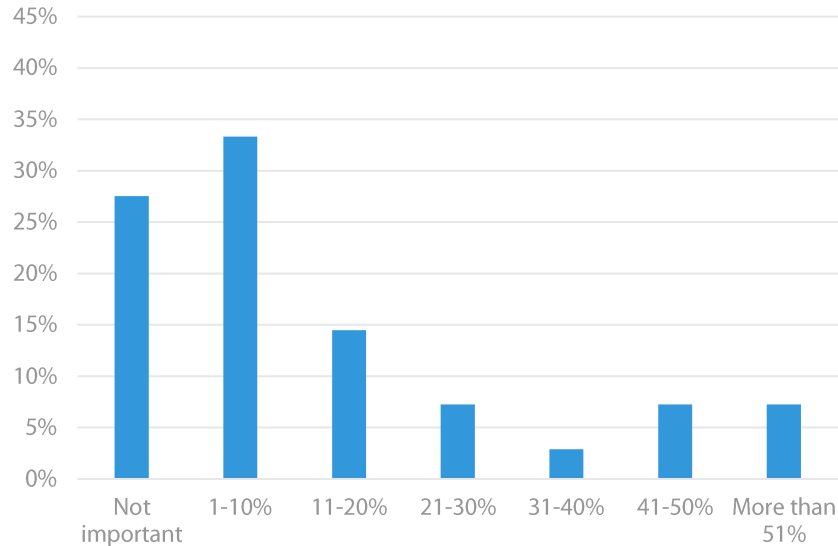
Mitigation of Covid-19 impact

Description of Supply Chain aspects

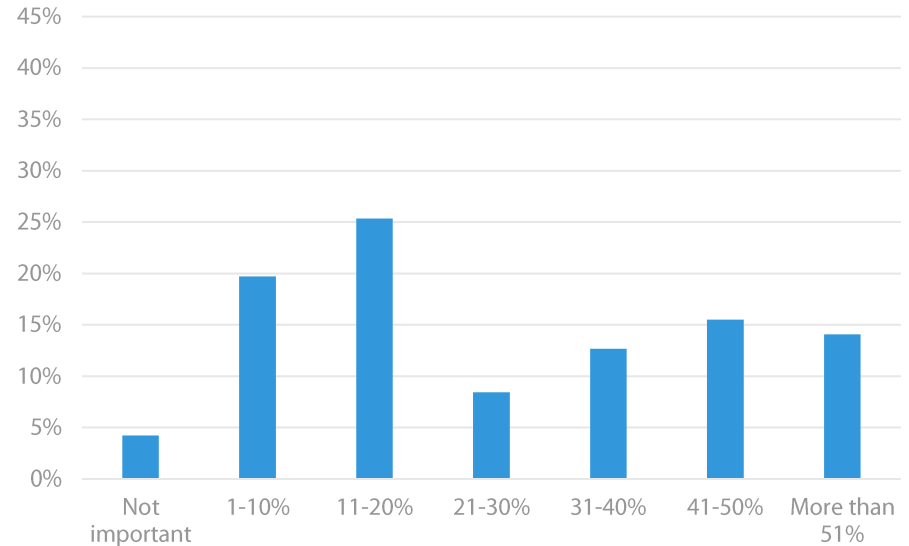


Supplier Preference on Evaluation Criteria proportions

Sub-contractor management methodology



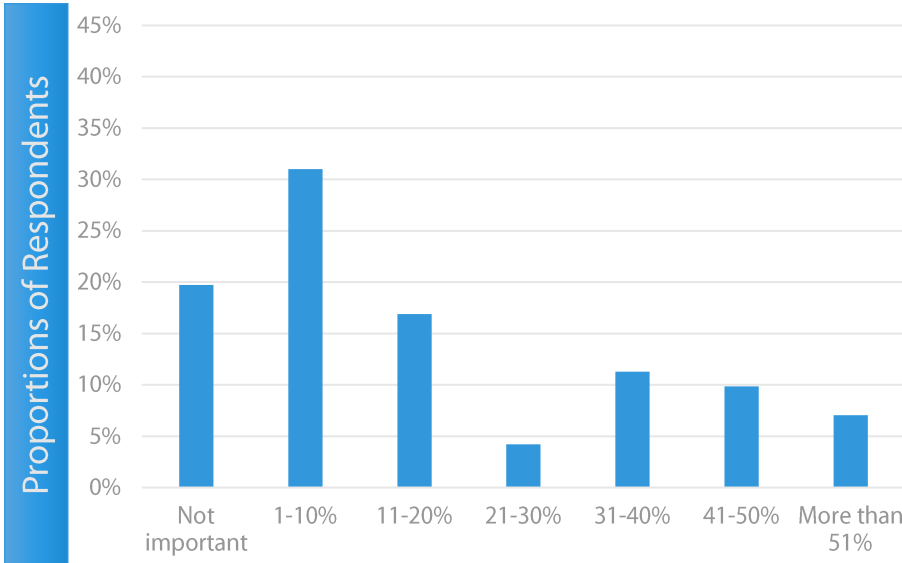
Time schedule quality, milestones, schedule logic



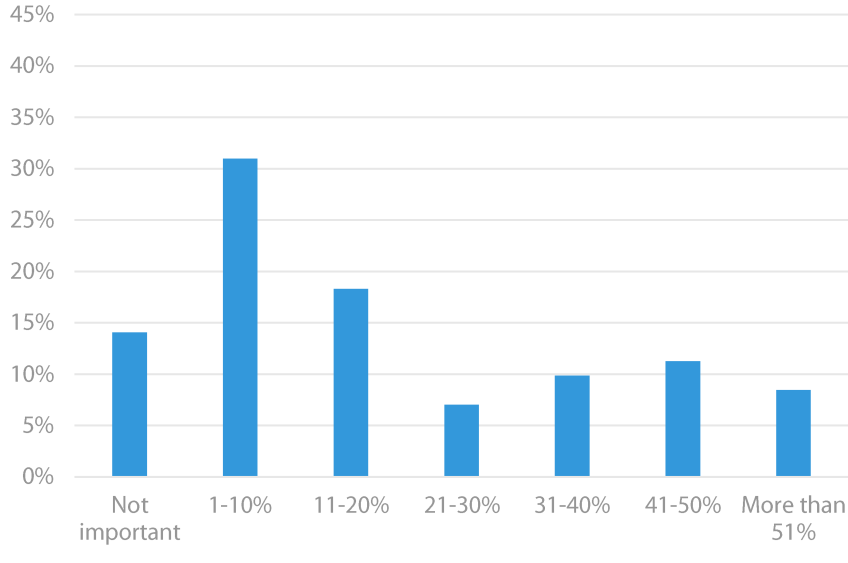
Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

Description of environmental management system and its implementation



Description of quality management system and its implementation

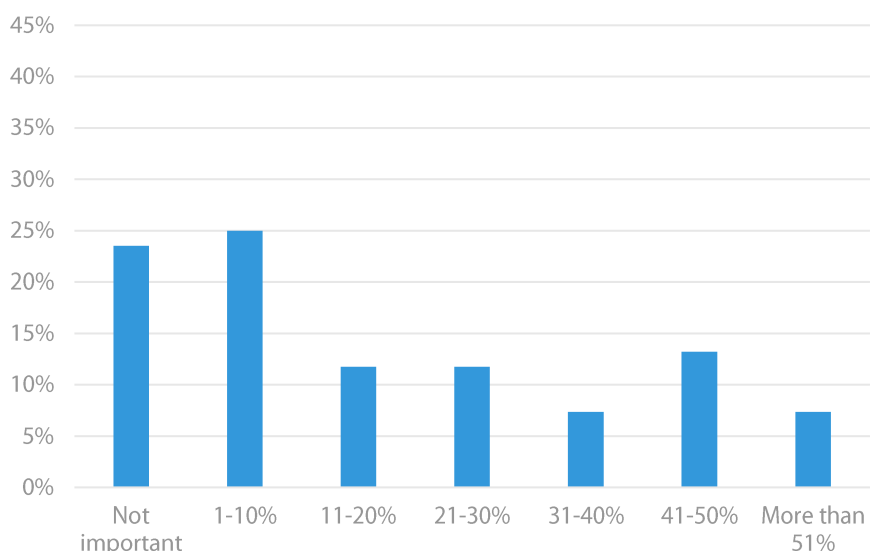
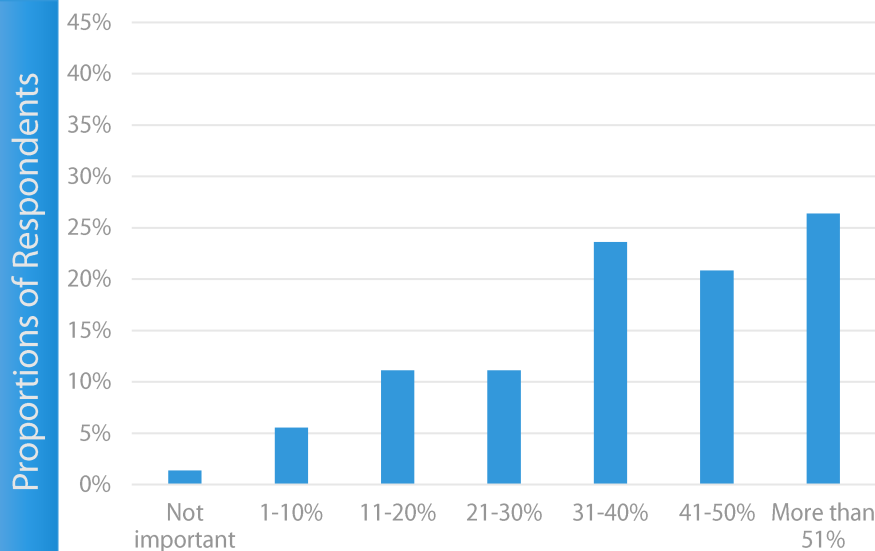


Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

Proposal Price

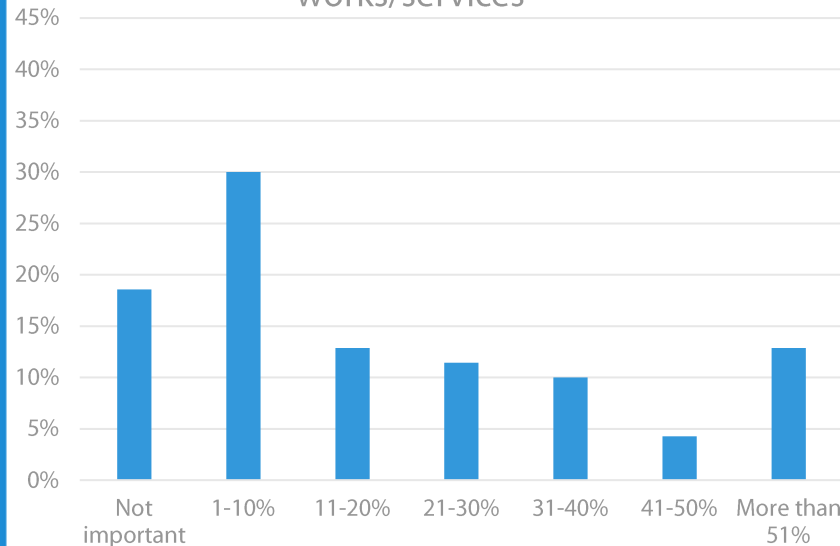
Description of occupational and work safety and its implementation



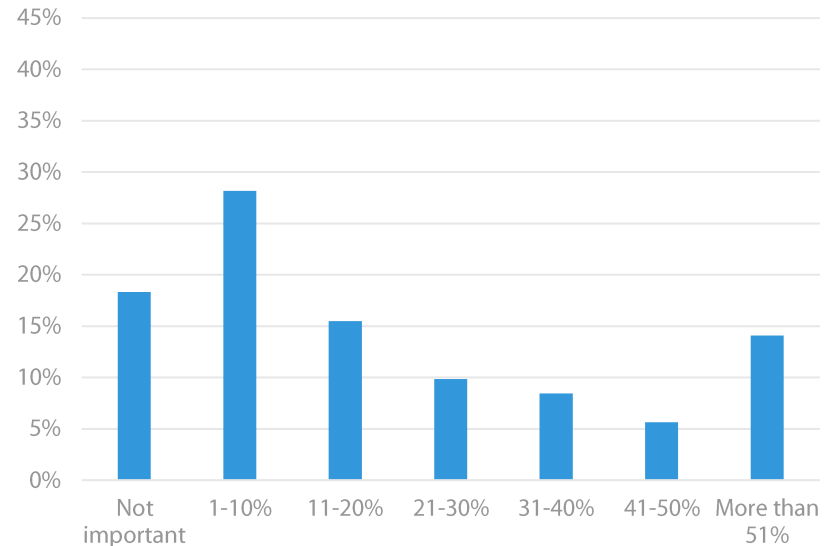
Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

Previous experience in implementing the 1435 mm gauge railway design or construction or related works/services



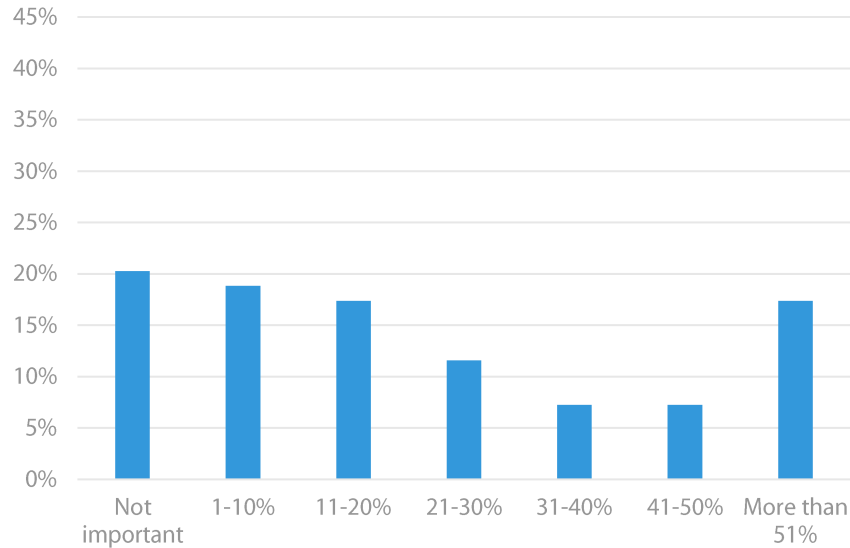
Environmental and green requirements/aspects



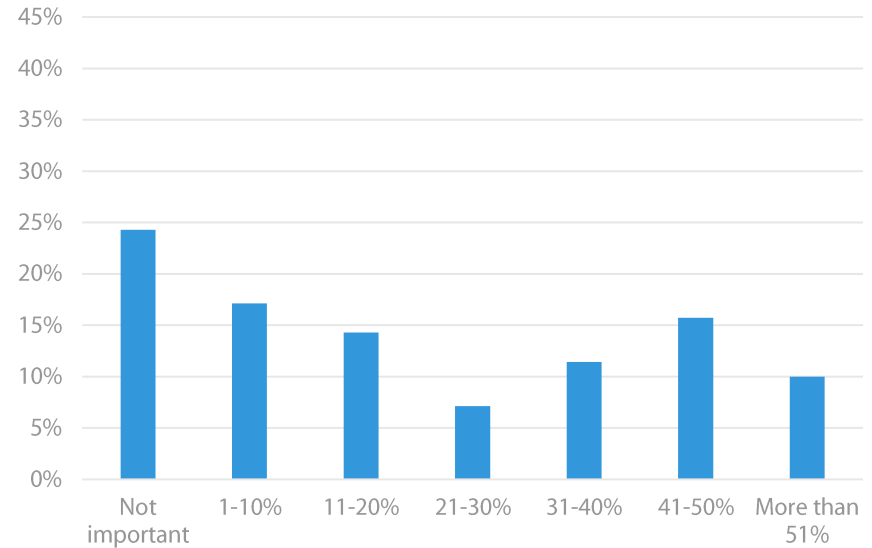
Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

Sustainability and business continuity



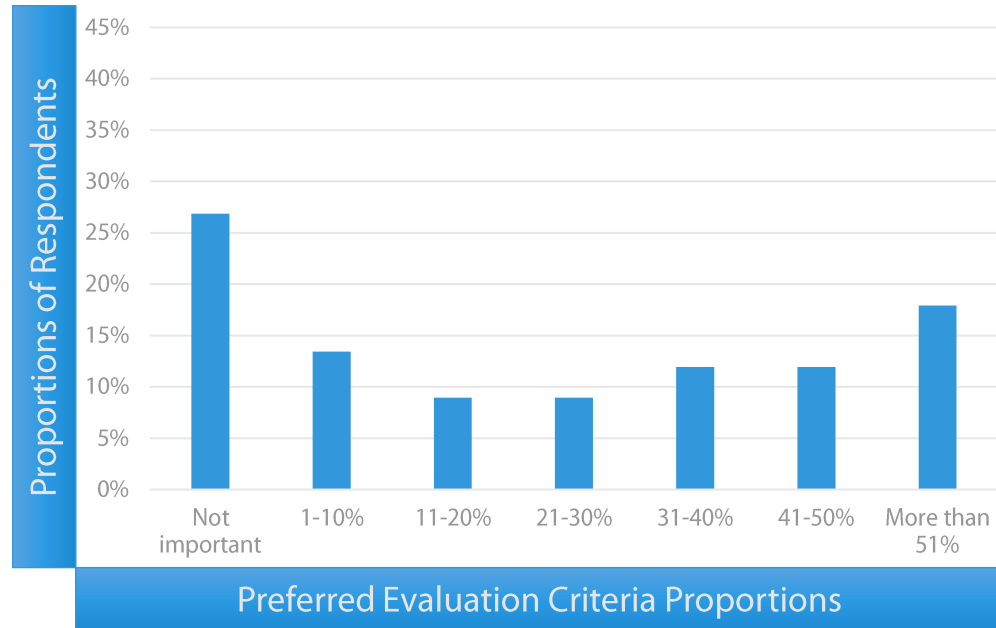
Warranty period

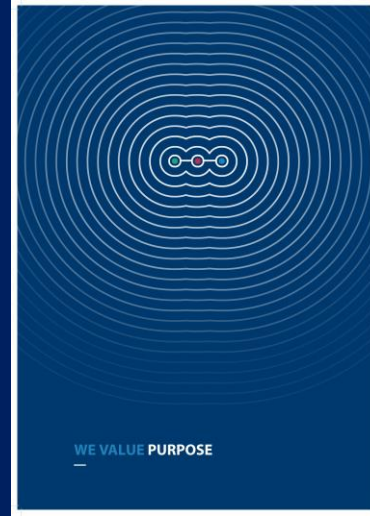
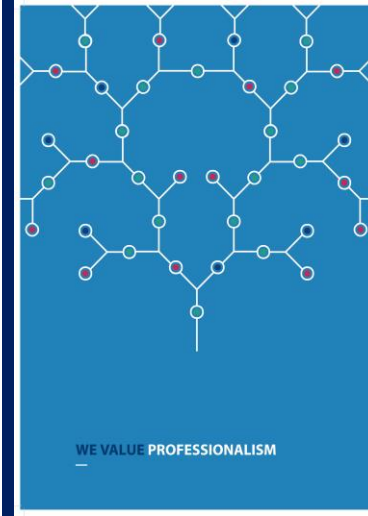
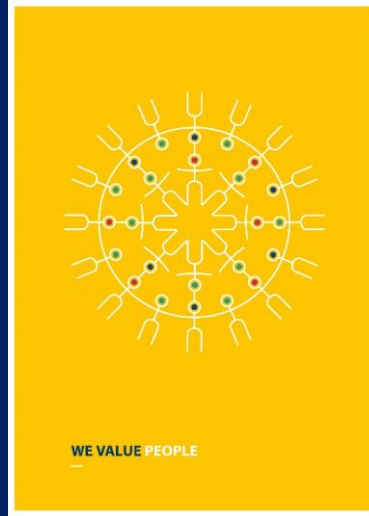


Preferred Evaluation Criteria Proportions

Supplier Preference on Evaluation Criteria proportions

Terms of delivery (only for Goods)





Thank you!