



# Recruitment of consultants

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Asian Development Bank  
**BUSINESS  
OPPORTUNITIES**  
|| F A I R ||



# Regional Multi-lateral Development Bank with HQ in Manila, Philippines





# ADB in 2013

In 2013, Asian Development Bank's (ADB) operations totaled \$21.02 billion, \$14.38 billion financed by ADB and Special Funds and \$6.64 billion by cofinancing partners. The total \$14.38 billion consists of (i) \$13.19 billion loans, (ii) \$35 million in guarantees, (iii) \$142.0 million in equity investments, (iv) \$849 million in grants, and (v) \$149 million in technical assistance (TA).

# Top five recipients ranking

The top five recipients including cofinancing are

- 1) India (\$2.66 billion)
- 2) Pakistan (\$2.58 billion)
- 3) People's Republic of China (\$2.36 billion)
- 4) Viet Nam (\$2.06 billion)
- 5) Indonesia (\$2.05 billion)

Excluding cofinancing, the top five recipients ranking changes as follows:

- 1) India (\$2.45 billion)
- 2) People's Republic of China (\$2.05 billion)
- 3) Pakistan (\$1.54 billion)
- 4) Indonesia (\$1.02 billion)
- 5) Philippines (\$0.88 billion)



# Where most opportunities are?

1. **Infrastructure**
2. **Environment**
3. **Regional Cooperation and Integration**
4. **Finance Sector Development**
5. **Education**



# Limited opportunities for consultants

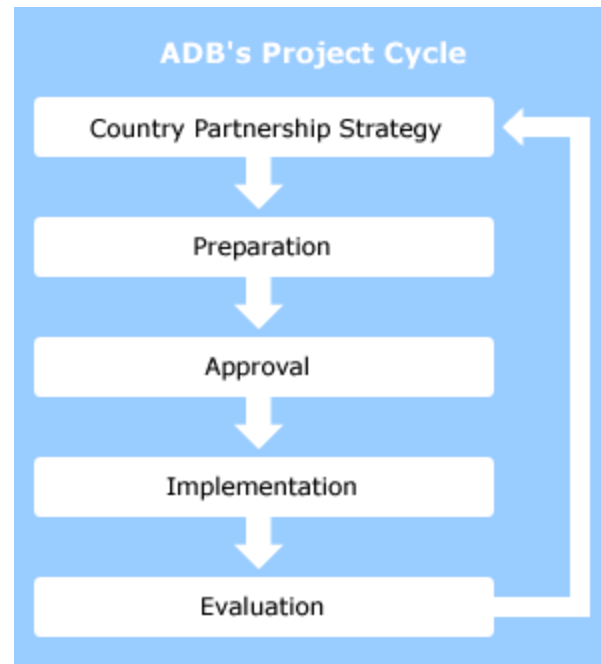
Health

Agriculture

Disaster and Emergency  
Assistance



# ADB Project Cycle and Business Opportunities



# Business Opportunities

## Consultants

- Technical Assistance\*
- Staff Consulting\*
- Grants\*\*
- Loans\*\*

## Suppliers and Contractors

- Grants\*\*
- Loans\*\*
- Institutional Procurement\*

\* Procured by ADB (exception – delegated TA)

\*\* Procured by the Borrower ( exception – request for ADB to assist)



# Procurement Ranking Consulting Services (Loans)

Rank	2011	2012	2013
1 <sup>st</sup>	IND	KOR	IND
2 <sup>nd</sup>	KOR	AUS	AUS
3 <sup>rd</sup>	INO	IND	FRA
4 <sup>th</sup>	PAK	CAN	VIE
5 <sup>th</sup>	SWI	FRA	BAN

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (EA Administered Grants)

Rank	2011	2012	2013
1 <sup>st</sup>	USA	NEP	NEP
2 <sup>nd</sup>	PRC	AUS	NET
3 <sup>rd</sup>	NEP	UKG	GER
4 <sup>th</sup>	VIE	KOR	AUS
5 <sup>th</sup>	KOR	CAN	LAO

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (ADB Administered Grants)

Rank	2011	2012	2013
1 <sup>st</sup>	AUS	UKG	CAM
2 <sup>nd</sup>	GER	NET	BAN
3 <sup>rd</sup>	IND	IND	INO
4 <sup>th</sup>	PHI	CAM	PHI
5 <sup>th</sup>	NZL	AUS	USA

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (TAs)

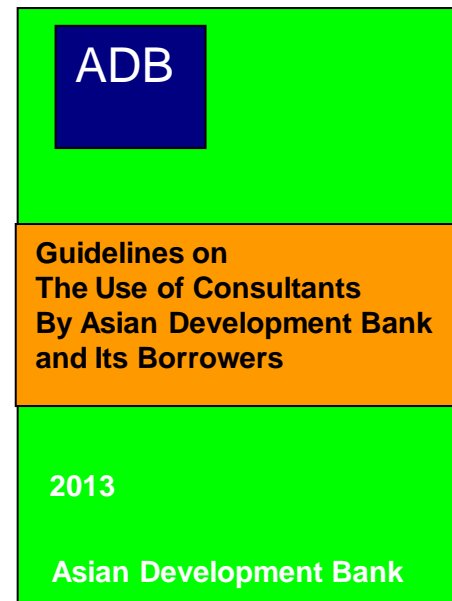
Rank	2011	2012	2013
1 <sup>st</sup>	USA	PHI	AUS
2 <sup>nd</sup>	AUS	AUS	USA
3 <sup>rd</sup>	NZL	UKG	UKG
4 <sup>th</sup>	UKG	USA	IND
5 <sup>th</sup>	IND	IND	INO

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

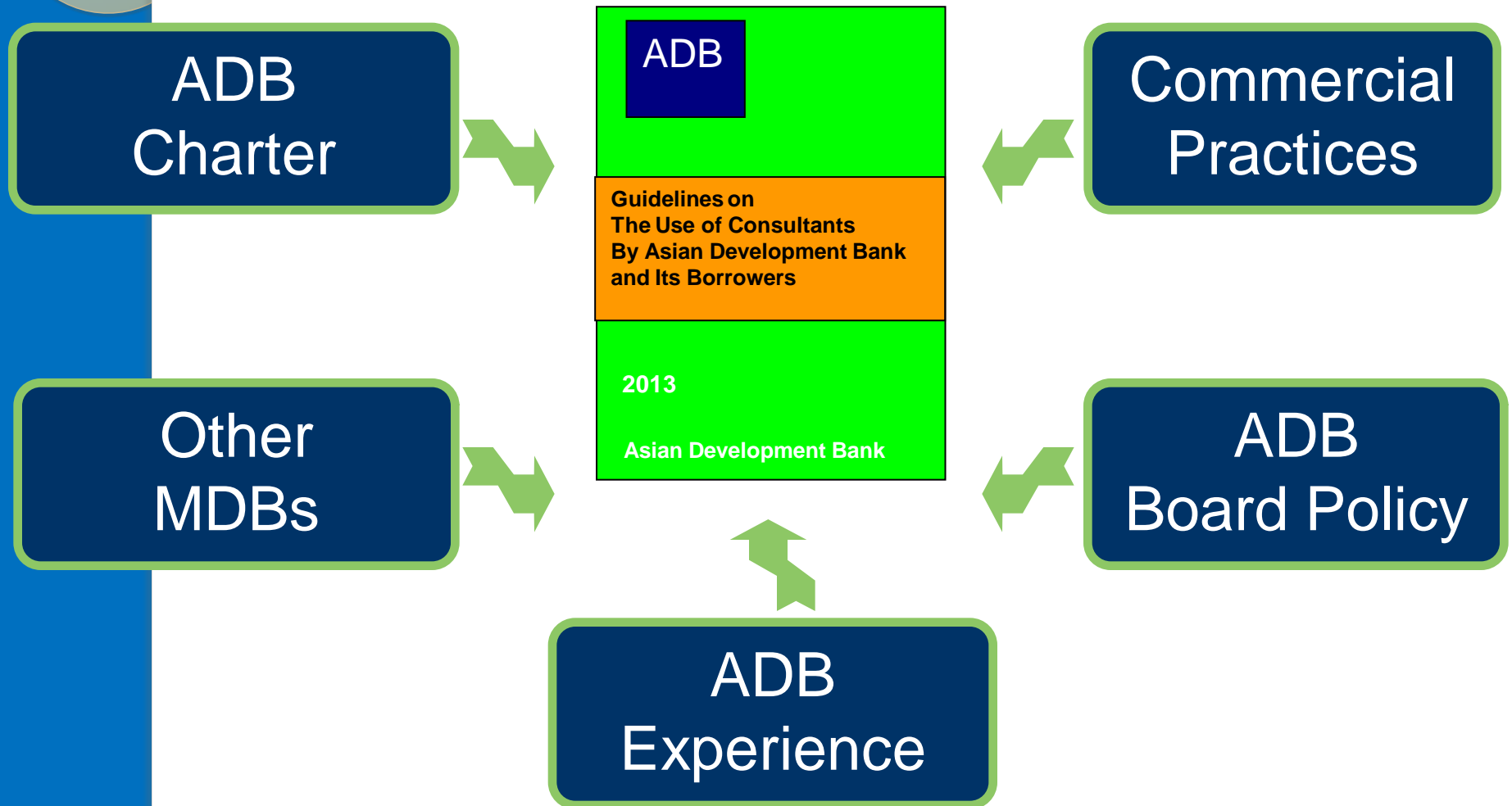
# Guidelines on the Use of Consultants by ADB and its Borrowers (2013)

- Policies and procedures for selecting, contracting and monitoring consultants.
- Applicable to both ADB and Borrower-administered contracts





# Guidelines on the Use of Consultants by ADB and Its Borrowers - Sources





# Coverage of the Guidelines

## Procurement Guidelines

Procedures apply to all contracts for goods and works financed in whole or in part by ADB.

## Consulting Guidelines

Consulting services to which these Guidelines apply are generally of an intellectual and advisory nature covering a wide range of sectors, both public and private, and a wide range of services at all stages of the project cycle. These guidelines do not normally apply to other types of services in which the physical aspects of the activity predominates (e.g. construction of works).



# Principles

1. need for high-quality service
2. Need for economy and efficiency
3. Need to give all qualified consultants an opportunity to compete in providing the services financed by ADB
4. ADB's interest in encouraging the development and use of national consultants from developing member countries (DMCs)
5. Need for transparency in the selection process
6. Need for increasing focus on anticorruption and observance of ethics

# Governance

Conflict of Interest is any situation in which a party has interests that could improperly influence that party's performance of official duties or responsibilities, contractual obligations, or compliance with applicable laws and regulations

- Conflict between consulting and procurement activities
- Conflict among consulting assignments
- 'Family' relationship between the consultant and the borrower
- Government officials – a special case

Unfair Competitive Advantage

- Equal access to information
- Upstream (PPTA) and downstream (Loan Projects) issues

Fraud and Corruption

Penalties (Misprocurement and Sanctioning)



# Consulting Trends

- Use of e-Procurement by ADB (CMS) and its Borrowers
- Gradual increase of national inputs.
- Gradual decrease of international inputs.
- Individual consultants' selection
- Inter-disciplinary assignments
- PPP/ PSP/ Non-sovereign lending



# Web-Networking Opportunities

- ADB set up network to facilitate collaboration between consultants looking for business partners to pursue ADB-funded opportunities. Consultants/consulting entities will need to have LinkedIn profile and have at least 2 LinkedIn connections to be able to use the facility
- **ADB Consultants Network:**  
<http://www.linkedin.com/e/qfo72y-gkf0zuh8-6r/vgh/3796524/>
- As of 4 March 2013, the group has 2822 members



# Guidelines on the Use of Consultants

- Selection Methods and Determination of Consultants' source (International or National)

# Selection Methods (Firms)

Selection Method	Technical Proposal Evaluation	Financial Proposal	Selection procedure
LCS – Least Cost Selection	>= 750 out of 1000	Lowest priced	Firm with lowest priced responsive proposal wins
QCBS – Quality and Cost based selection	>= 750 out of 1000	Competitive (Quality-cost ratio 70:30; 80:20; 90:10)	Firm representing the best combination of quality and price wins
FBS – Fixed Budget Selection	>= 750 out of 1000 And Highest Technical Score	<= budget	Firm with the best technical proposal and the financial proposal within the budget wins
QBS – Quality Based Selection	>= 750 out of 1000 And Highest Technical Score	Supporting documents to prove financial position of the firm, remuneration of experts, social and overhead charges	Negotiations are conducted with the firm that presented the best technical proposal
CQS – Consultants' Qualification Selection	Amplified Expression of Interest (EOI) Structured EOI submission >= 750 out of 1000		Negotiations are conducted with the firm that presented the best expression of interest
SSS – Single Source Selection	>= 750 out of 1000	Supporting documents to prove financial position of the firm, remuneration of experts, social and overhead charges	Negotiations are conducted with the firm that is selected without benefit of competition



# Factors Affecting the Choice of Selection Method

- ADB's recruitment principles emphasize competition
- Technical complexity of the assignment
- Size and value of the assignment
- Assessment of national consulting industry
- Budget constraints/transaction costs
- Urgency / response to emergency situations/ natural disasters



# Guidelines on the Use of Consultants

- Commercial Practices.
- 2.33. In the case of loans on-lent by a financial intermediary to private sector enterprises or autonomous commercial enterprises in the public sector, the sub-borrower may follow well-established private sector or commercial practices that have been determined by ADB to be acceptable to it. Consideration shall also be given to the use of competitive procedure outlined earlier, particularly for large assignments.



# Contract Types

## “pre-2006” contracting arrangements

- Time based contract
- Lump sum contract

## After 2006

- Indefinite delivery contract ( Price Agreement)
- Retainer and/ or Contingency ( Success) Fee Contract
- Performance based contracts/hybrid



# Standard Request for Proposal (SRFP)

- Mostly harmonized document with other MDBs
- Effectivity date for implementation – shortlists finalized after 2 July 2012.
- ADB made over 12 editorial rounds of changes in 2012 and 2013, thus version of the RFP issued to the consultants is important in responding to specific questions/ queries/ issues

# Standard RFP - Applicability

- Standard RFP is used for consulting engagements of teams of experts recruited through firms by ADB borrowers/ grant recipients
- Standard RFP is issued for all selection methods (including Single Source Selection – SSS and Consultants' Qualification Selection – CQS). Please note that other MDBs do not issue RFPs for SSS and CQS selections
- **The use of SRFP is not required for selections conducted under commercial practice, selection of individual consultants and selections through ADB's online Consultant Management System (CMS).**
- If ADB is asked to conduct selection on behalf of the Borrower/ Grant recipient, the CMS RFP is issued for tendering, but Standard RFP contract forms are used for negotiations by the Borrower.



# Loan and Grant Consulting Selection of firms

Standard Request for Proposals  
Summary of major changes

## pre-2012 RFP format

1. Letter of Invitation (LOI)
2. Instructions to Consultants (ITC)
3. Tech. Proposal – TECH Forms 1-8
4. Fin. Proposal – FIN Forms 1-5
5. Terms of Reference (TORs)
6. Standard Forms of Contract
7. List of ADB Member Countries

## SRFP format ( after 2012)

### PART I – SELECTION PROCEDURES AND REQUIREMENTS

- 1: Letter of Invitation (LOI)
- 2: Instructions to Consultants,
- 3: Technical Proposal Forms
- 4: Financial Proposal Forms
- 5: Eligible Countries
- :6 Bank's Policy – Corrupt and Fraudulent Practices
- 7: Terms of Reference (TORs)

### PART II – CONDITIONS OF CONTRACT AND CONTRACT FORMS

- 8: Standard Forms of Contract (includes Section 6 above)



# PART I – SELECTION PROCEDURES AND REQUIREMENTS

## **Section 1: Letter of Invitation (LOI)**

- This Section is a template of a letter from the Client addressed to a shortlisted consulting firm inviting it to submit a proposal for a consulting assignment. The LOI includes a list of all shortlisted firms to whom similar letters of invitation are sent, and a reference to the selection method and applicable guidelines or policies of the financing institution that govern the selection and award process.



## **Section 2: Instructions to Consultants, Data Sheet, Summary and Personnel Evaluation Forms and Grounds for Disqualification of the Experts.**

- This Section consists of two parts: “Instructions to Consultants” and “Data Sheet”. “Instructions to Consultants” contains provisions that are to be used without modifications. “Data Sheet” contains information specific to each selection and corresponds to the clauses in “Instructions to Consultants” that call for selection-specific information to be added. This Section provides information to help shortlisted consultants prepare their proposals. Information is also provided on the submission, opening and evaluation of proposals, contract negotiation and award of contract. Information in the Data Sheet indicates whether a Full Technical Proposal (FTP), Simplified Technical Proposal (STP) or Biodata Technical Proposal (BTP) shall be used.
- Summary and Personnel Evaluation Forms and Grounds for Disqualification of the Experts are attached as well



## Section 2 – Instructions to Consultants

- “Key expert(s) means an individual professional whose skills, qualifications, knowledge and experience are critical to the performance of the Services under the Contract and whose CV is taken into account in the technical evaluation of the Consultant’s proposal”
- “Non-Key Expert(s)” means an individual professional provided by the Consultant or its Sub-Consultant and who is assigned to perform the Services or any part thereof under the Contract and whose CVs are not evaluated individually.

## Section 2 – Instructions to Consultants - COI and Unfair Competitive Advantage

- 3. The Consultant has an obligation to disclose to the Client any situation of actual or potential conflict that impacts its capacity to serve the best interest of its Client. Failure to disclose such situations may lead to the disqualification of the Consultant or the termination of its Contract and/or sanctions by the Bank.
- 4. Fairness and transparency in the selection process require that the Consultants or their Affiliates competing for a specific assignment do not derive a competitive advantage from having provided consulting services related to the assignment in question. To that end, the Client shall indicate in the **Data Sheet** and make available to all shortlisted Consultants together with this RFP all information that would in that respect give such Consultant any unfair competitive advantage over competing Consultants. (potentially problematic, as Client is assumed to possess all information related to unfair competitive advantage)



## Section 2. Data Sheet - Guidance on legal status of the firm

- Proof of legal status establish Consultant's legal capacity to enter into binding and enforceable contracts and may be supported by:
- Certificate of incorporation in an ADB member country.
- Partnerships duly organized in an ADB member country
- Universities, institutions, public sector organizations, and NGOs that are not legally incorporated shall provide other documentation that establishes their legal capacity to enter into binding and enforceable contracts with the Client (such as charter, statute, etc.).



## **Section 3. Technical Proposal – Standard Forms**

## **Section 4. Financial Proposal – Standard Forms**

### **Technical Forms**

- Form TECH-6 (for FTP, STP and BTP)  
Team Composition, Assignment, and Key Experts' inputs
- Made adjustments to table all “Key” and “Non-Key” experts to check eligibility
- Included ADB template for CV (other MDBs do not have templated CV for the purpose of SRFP)

### **Financial Forms**

- Breakdown of remuneration includes remuneration of Non-key experts



# Section 5. Eligible Countries

## Section 6 Bank Policy – Corrupt and Fraudulent Practices

Section 5 - No substantive change

Section 6 is now forming part of RFP  
and part of the contract as well

# Section 7. – Terms of Reference

Expanded coverage/ Templated approach

1. Background \_\_\_\_\_
2. Objective(s) of the Assignment \_\_\_\_\_
3. Scope of Services, Tasks (Components) and Expected Deliverables
  - 3.1 \_\_\_\_\_
  - 3.2 [indicate if downstream work is required]
  - 3.3 [indicate if training is a specific component of the assignment]
4. Team Composition & Qualification Requirements for the Key Experts (and any other requirements which will be used for evaluating the Key Experts under Data Sheet 21.1 of the ITC)



# Section 7. – Terms of Reference

## 5. Reporting Requirements and Time Schedule for Deliverables

At a minimum, list the following:

- (a) format, frequency, and contents of reports;
- (b) number of copies, and requirements to electronic submission (including desired format). Final reports shall be delivered in soft copies in addition to the specified number of hard copies;
- (c) dates of submission;
- (d) persons (indicate names, titles, submission address) to receive them; etc.

If the Services consist of or include the supervision of civil works, the following action that require prior approval by the Client shall be added: “Taking any action under a civil works contract designating the Consultant as “Engineer”, for which action, pursuant to such civil works contract, the written approval of the Client as “Employer” is required.”

# Section 7. – Terms of Reference – Client’s Inputs

## 6. Client’s Input and Counterpart Personnel

(a) Services, facilities and property to be made available to the Consultant by the Client:

\_\_\_\_\_ [list/specify]

(b) Professional and support counterpart personnel to be assigned by the Client to the Consultant’s team:

\_\_\_\_\_ [list/specify]

7. Client will provide the following inputs, project data and reports to facilitate preparation of the Proposals: (list/ specify/ attach. If none, state N/A



# **PART II – CONDITIONS OF CONTRACT AND CONTRACT FORMS**

## **8: Standard Forms of Contract**

**Large assignments:**

**Lump sum or Time based**

**Small assignments ( below 300 K):**

**One form for lumpsum/ time based  
(trial basis)**

# Consultants contracted by ADB

Major differences:

- ADB uses electronic procurement platform (Consultant Management System)
- Tax-exemption status may apply to contracting party (but not to subconsultants), except “where a member deposits with its instrument of ratification or acceptance a declaration that such member retains for itself and its political subdivisions the right to tax salaries and emoluments paid by the Bank to citizens or nationals of such member” (Article 56 of ADB Charter)

# Consultant Management System

- Is an integrated system for registration and maintaining profiles of both consulting entities and individuals. DACON (for consulting entities registration) and DICON (for individual consultant registration) are not used by ADB since 2008.
- Allows consultants to register online via the Internet. The registration need to be updated at least once per year to avoid deactivation.
- Consultant Management System (CMS) registration of consultant or consulting entity is necessary to express interest online. There are 2 types of CMS registration – i) simplified (shall not take more than 15 minutes to complete; ii) full (depends on the qualifications) . Full registration is required prior to issuance of contract. Full registration (project information) is necessary for new CSRN, otherwise EOIs through new CSRN would not be accepted.

# CMS - Simplified and Full Registration

- **Simplified Registration** Allows consultants to register quickly. Information required in the simplified registration process would be the **Basic Information** and **Attachments and Certification** for both individuals and firms
- Tip: Registration must be completed within 30 minutes to avoid time-outs. Consultant information must be ready prior to registration.
- **Full Registration** ADB encourages consultants to complete the full registration to increase chances of being selected as the selection process of consultants starts with a search based on the consultants' experience and other related information. Allows consultants to provide additional information about their consultancy experience.
- Information required in the **full registration of individual consultants** would include **Work Experience, Credentials** and **Additional Information**
- **Consulting firm full registration** would require **Business Details, Employees of the Organization** and **Key Experts**
- *Note:* It is mandatory for consultants to be registered in CMS prior to expressing interest in ADB-financed TA projects and staff consulting assignments. During negotiations, consulting firms must have their team members register in CMS before contract award.

# CMS features

Consultant Management System (CMS) provides facility for online registration, recruitment and management of qualified and eligible consultants for ADB-administered projects.

Through CMS, consultants can:

- register and keep their profiles updated;
- receive weekly email notifications on new consulting opportunities;
- receive and respond to Requests for Proposals (RFPs) for firms' engagements;
- receive and respond to Non-Committal Inquiries (NCI) for individual consultants' engagements;
- create and submit proposals online;
- negotiate and finalize contracts;
- **NEW !** submit claims, requests for advances and variations ( Staff consultants contracts)
- submit feedback on completed projects.



# Consultant Management System

## Contract administration

- Individual consultants and resource persons accept the ADB offers online using their login and password and attaching necessary documents (updated and signed CV, health certificate etc).
- Consultants that are contracted by ADB need to submit the Bank information details (including intermediary bank details). Banks located in USA with payment instructions in USD would not need intermediary bank information. Banks located in Europe need to have IBAN number.
- Failure to provide intermediary bank details may result in delays or processing payments. If you don't know the intermediary bank information, visit your bank branch and ask.





# Consulting Services Recruitment Notice (CSRN)

- The Consulting Services Recruitment Notice (CSRN) provides detailed information on the consulting services required for ADB financed or administered technical assistance, loans and grants and provides the ability to collect expressions of interest (EOI).
- Starting from 26 January 2009, the system also allows advertisements of Staff Consulting Assignments, Indefinite Delivery Contracts and Special Assignments.
- Starting 1<sup>st</sup> week of September 2010, use webmailing facility to inform consultants on currently advertised opportunities.
- In 2012 CSRN became fully integrated with CMS

# Expressions of Interest (EOIs)

- For projects and assignments administered by ADB, EOIs are expected to be presented online through CSRN (Consulting Services Recruitment Notice)
- If for any reason, you are unable to use the e-facility, send the EOI to project officer stated in the CSRN. Standard template for EOI shall be followed. You may also attach EOI to your Consultant Management System registration page and cross-reference your submission.
- For EA administered assignments, submit EOI online (if option is available) and also send the copy of the EOI to EA contact person stated in the notice.
- If CSRN requests answering specific questions or attaching specific documentation, follow the instructions!
- Standard EOI templates are available at <http://www.adb.org/site/business-opportunities/operational-procurement/consulting/documents>

# CMS e-Sourcing for Consulting Firms

- E-sourcing facility – electronic submission of technical and financial proposal
- Not a “drop-box” facility, e.g. requires sustainable internet connection and filling up templated forms.
- Checks technical proposal vis-à-vis data sheet
- Checks financial proposal submission vis-à-vis data sheet and technical proposal. Picks up inconsistencies, that result in “error” or “warning” messages.
- The conflict will need to be resolved prior to submission of the proposal. Internally inconsistent proposals can't be submitted.
- Proposal can be returned to “draft status” from “submitted” before deadline.
- **Please aim to attach required attachments in PDF format. Failure to do so may affect formatting when “convert to PDF” is used, and may result in lower scoring for “presentation”**
- **Key lesson:** Be prepared; aim to submit proposal several days prior, communicate with ADB if there are technical difficulties prior to the deadline, not after.

# CMS eSourcing for Consulting Firms– Key procedural changes

- QBS submissions require financial proposal at the same time as technical. Financial proposal remain encrypted. Only first ranked consulting entity will need to present substantiation of rates. If you did not prepare financial proposal, you will not be able to submit proposal at all.
- All members of association/ JV shall be registered in CMS prior to submission
- If the proposal is submitted by JV/ association, include JV/ association letter.
- All proposed personnel shall be registered in CMS prior to contract award.
- Copy of government issued IDs is required to establish identity of the individual consultant, his/ her willingness to participate in the tender and eligibility.



# CMS eSourcing for individual Consultants— Key procedural changes

- Copy of government issued IDs is required to establish identity of the individual consultant, his/ her willingness to be considered for ADB-funded assignment and eligibility.
- Non-committal Inquiries are now processed through CMS.
- Offers are now processed online. Unless all required attachments are in place, consultants are not able to proceed with accepting the offer.
- If for any reason, you don't accept the offer, you may attach the documents that support your decision to reject the offer.
- Consultants need to enter payment instructions (including intermediary bank account information) as part of contract negotiations for individual consultant contract

# How to access CMS?

<http://www.adb.org/Consulting/cms.asp> or  
<http://cms.adb.org>

- Log-in to <http://www.adb.org/>
- Click on the Opportunities tab  
<http://www.adb.org/Opportunities/>
- Click on the Business Opportunities  
<http://www.adb.org/Business/Opportunities/default.asp>
- Click on Consulting Services  
<http://www.adb.org/Consulting/default.asp>
- Click on Consultant Management System (CMS)  
<http://www.adb.org/Consulting/cms.asp>
- Choose Appropriate Portal (e.g. consulting entity registration or individual consultant registration or consultant portal)

# CMS User Support

ADB supports users of CMS through variety of Business Change Management Solutions:

Quick Reference Guides (QRGs) on use of CMS modules (available at the right hand side of CMS portal)

CMS e-learning materials for consulting firms are available at:

[https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740021056D.nsf/h\\_Toc/26bef2dad507c7d948257b7400210f03/?OpenDocument](https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740021056D.nsf/h_Toc/26bef2dad507c7d948257b7400210f03/?OpenDocument)

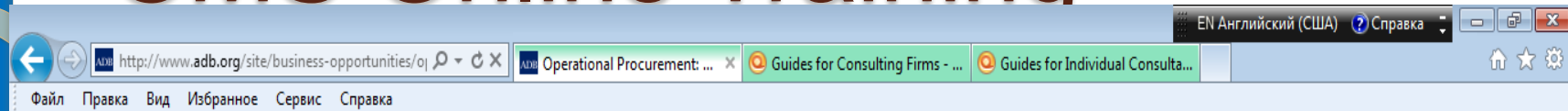
CMS e-learning materials for individual consultants are available at:

[https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740020CC60.nsf/h\\_Toc/faf2aa0b10198df248257b740020de9b/?OpenDocument](https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740020CC60.nsf/h_Toc/faf2aa0b10198df248257b740020de9b/?OpenDocument)

Dedicated line of user support at [cmshelp@adb.org](mailto:cmshelp@adb.org) (available Monday-Friday, 8 am – 5 pm Manila time). Also, call ADB trunk line at 632 -632 4444 and ask to be connected to CMS Help, if the matter is very urgent and no response was received to your email



# CMS Online Training



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## Business Opportunities

### NAVIGATION

Main

Operational Procurement: Consulting Services

Procurement Plans

Shortlisted Firms

Contracts Awarded

Documents on Consulting Services

Indefinite Delivery Contracts

Operational Procurement: Goods, Works, and Related Services

Institutional Procurement

Transaction Advisory Services

Contacts

Procurement Notices

## Operational Procurement: Consulting Services



### OVERVIEW

ADB engages individual consultants and consulting entities (firms, universities, NGOs, etc.) for a wide range of assignments. For example, consulting entities are retained for pre-investment, sector, or other studies, detailed design, contract preparation, and project supervision. Individual consultants, whether hired directly or through consulting entities, provide expert advice and help the ADB to prepare studies, appraisals, and reports.

Consultant Management System (CMS)



### KEY DOCUMENT



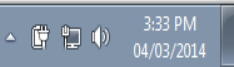
Guidelines on the Use of Consultants by Asian Development Bank and Its Borrowers

### ONLINE TRAINING

Videos and Guides on how to use CMS for Consulting Firms

Videos and Guides on how to use CMS for Individual Consultants

### LINKEDIN





# CMS Online Training

The screenshot displays the ADB Consultant Tutor website in a browser window. The browser's address bar shows the URL <https://wprq14.adb.org/LotusQuickr/consultanttutor/>. The website header includes the ADB logo and the text "Consultant Tutor" with a "Log In" link. A navigation menu contains "HOME", "INDIVIDUALS", and "FIRMS", along with a search bar labeled "Search this place".

The main content area is titled "You are in consultanttutor>Individuals" and features a section for "Individual Consultants". A news item dated "7 May 2012" states: "7 May 2012 marked the first day of the roll-out of engaging individual consultants through CMS. Now, registered Individual Consultants can view Advertisements, submit Expressions of Interest (EOI), respond to Non-Committal Inquiries (NCI) and Negotiate the contract in one online system."

Below this, there is a "support" section with a headset icon, contact information: "Email: [cmshelp@adb.org](mailto:cmshelp@adb.org)", and "Support Hours: 08:00 - 17:00 (GMT+8)".

A "Video" section lists several topics with video icons: "Submitting EOIs and Responding to Non-Committal Inquiries", "Entering Payment Information", "Entering Timesheets", and "Submitting Claims".

At the bottom, a section titled "Contract Administration module begins roll-out on June 2013" states: "Now, Individual Consultants (contracts with prefix A, O, C or D) engaged in internal resource-funded budget projects can file their claims, advances and contract variation request in CMS."

The browser's taskbar at the bottom shows various application icons, including Internet Explorer, Google Chrome, and Microsoft Office applications. The system tray in the bottom right corner displays the time "3:36 PM" and the date "04/03/2014".

# CMS Online Training

The screenshot shows a web browser window displaying the ADB Consultant Tutor website. The browser's address bar shows the URL <https://wpqr4.adb.org/LotusQuickr/consultanttutor>. The website has a blue header with the ADB logo and the text "Consultant Tutor". Below the header, there are navigation tabs for "HOME", "INDIVIDUALS", and "FIRMS", along with a search bar. The main content area is titled "Consulting Firms" and includes a paragraph about the roll-out of engaging firms in CMS, a list of "Consulting Firm Quick Reference Guides", and a "Video" section. A sidebar on the left contains an "Info Center" with links to "Home", "Guides for Consulting Firms", and "FAQs for Consulting Firms", and a "support" section with contact information.

EN Английский (США) Справка

Operational Procurement: Co... Guides for Consulting Firm... Guides for Individual Consulta...

Файл Правка Вид Избранное Сервис Справка

Log In

## ADB Consultant Tutor

HOME INDIVIDUALS FIRMS Search this place

### Info Center

- Home
- Guides for Consulting Firms
- FAQs for Consulting Firms

### support

Email: [cmshelp@adb.org](mailto:cmshelp@adb.org)  
Support Hours: 08:00 - 17:00 (GMT+8)

You are in consultantutor>Firms

### Consulting Firms

Roll-out of engaging firms in CMS was held October 2010. This marks the first time an online system was used by firms in preparing and submitting their proposals for ADB-administered projects.

Along with the 7 May 2012 CMS-CSRN release, firms can now view Consulting Opportunities, submit Expressions of Interest (EOI), respond to Requests for Proposals (RFP), prepare and submit their Technical & Financial Proposals and Negotiate their contracts in one online system.

#### Consulting Firm Quick Reference Guides

- CMS Basics
- Managing Consulting Firm Profiles
- Responding to Request for Proposals
- Creating Technical Proposals
- Creating Financial Proposals
- Sending Clarification and Submitting Proposals
- Negotiating Contracts for Consultants
- Affiliating an Individual Consultant to a Firm

#### Video

- Responding to Requests for Proposals and Submitting Proposals
- Entering Payment Information

3:37 PM 04/03/2014

# ADB Business Opportunities – Where to Find?

The screenshot shows a web browser window with the URL [https://uxdmz06.adb.org/OA\\_HTML/adb/adbpc](https://uxdmz06.adb.org/OA_HTML/adb/adbpc). The page content includes:

- Registration:** A section for new users with buttons for "Register as Consulting Firm" and "Register as Individual Consultant".
- Need Help?:** A section with the email [cmshelp@adb.org](mailto:cmshelp@adb.org) for inquiries.
- ADB Project Team Members:** A section with a green icon and text explaining that team members can access all CMS functions like creating selections, advertising opportunities, and sending notices.
- Executing Agencies (EAs):** A section with a blue icon and text explaining that EAs can access Consulting Services Recruitment Notices (CSRN) to post consulting opportunities. It includes a list of details to email to [csrn@adb.org](mailto:csrn@adb.org):
  1. Email address of the agency representative
  2. Full name of the agency representative
  3. Name and address of the agency
  4. Duration of the recruitment for the project
- Consulting Services Recruitment Notice (CSRN):** A section with a blue header explaining that the CSRN provides detailed information on consulting services required for ADB-financed or administered projects. It includes a link to view the list of advertisements of consulting opportunities.
- Browser Compatibility:** A section stating that CMS works best using the following browsers:
  - 32-bit Internet Explorer Browser
    - Internet Explorer 6 to 8 on Windows XP (32-bit)
    - Internet Explorer 7 to 9 on Windows Vista (32-bit)
    - Internet Explorer 8 to 10 on Windows 7 (32-bit & 64-bit)
    - Internet Explorer 10 on Windows 8 (Desktop Mode) (32-bit & 64-bit)
  - 64-bit Internet Explorer Browser

A blue arrow points from the "Executing Agencies (EAs)" section to the "Click here to view the list of advertisements of consulting opportunities." link.

**CMS SYSTEM UPDATE**

Dear CMS Users,

We are currently testing the new modules on filing claims, requesting advances and forwarding contract variations for selected contracts in CMS.

Should you experience slowness, error screens or blank pages when working with CMS, contact [cmshelp@adb.org](mailto:cmshelp@adb.org).

We thank you for your support in this new initiative of the ADB.

CMS Team

**NOTE:** CMS undergoes weekly maintenance activities from 11 p.m. Saturday until 8 a.m. Sunday following morning (Manila time, GMT+8).

# ADB Business Opportunities

EN English (United States) Development Bank - Microsoft Internet Explorer provided by Asian Development Bank  
http://www.adb.org/site/business-opportunities/operational-procurement/consulting

ADB Asian Development Bank  
FIGHTING POVERTY IN ASIA AND THE PACIFIC

Search

About ADB News & Events Data & Research Publications Countries Projects Focus Areas

Business Opportunities Operational Procurement Consulting ShareThis

## Business Opportunities

### Consulting Services



#### NAVIGATION

- Main
- Operational Procurement
  - Consulting Services
  - Goods, Works, and Related Services
- Institutional Procurement
- Contacts

Procurement Notices

E-mail Alerts

#### OVERVIEW

ADB engages individual consultants and consulting entities (firms, universities, NGOs, etc.) for a wide range of assignments. For example, consulting entities are retained for pre-investment, sector, or other studies, detailed design, contract preparation, and project supervision. Individual consultants, whether hired directly or through consulting entities, provide expert advice and help the ADB to prepare studies, appraisals, and reports.

#### ONLINE TRAINING

- Business Opportunities E-Learning Tool
- Responding to RFPs and Preparing & Submitting Proposals for Firms in CMS
- Responding to Non-Committal Inquiries for Individual Consultants in CMS



Done Trusted sites 100% 2:18 PM

start Consulting Services | ... Microsoft PowerPoint ...

# Business Opportunities – Quick Links

The screenshot shows the Asian Development Bank (ADB) website. The browser address bar displays <http://www.adb.org/about/main>. The page features a navigation menu with the following items: **About ADB**, **News & Events**, **Data & Research**, **Publications**, **Countries**, **Projects**, and **Focus Areas**. The **About ADB** menu is expanded, showing three main categories: **ORGANIZATION**, **FINANCING OPERATIONS**, and **CONTACTS**. Under **FINANCING OPERATIONS**, the **OPPORTUNITIES** section is highlighted, with **Consulting Services** selected. The **Consulting Services** sub-menu includes: **ADB-Japan Scholarship Program**. The **OVERVIEW** section on the right contains a photograph of a group of people in a meeting and the text: "Since its founding in 1966, ADB has been driven by an inspiration and dedication to improving people's lives in Asia and the Pacific. By targeting our investments wisely, in partnership with our developing". The Windows taskbar at the bottom shows the system clock as 3:40 PM on 04/03/2014.

**ADB Asian Development Bank**  
FIGHTING POVERTY IN ASIA AND THE PACIFIC

Search

**About ADB** | News & Events | Data & Research | Publications | Countries | Projects | Focus Areas

**ORGANIZATION**  
Overview  
Key Facts  
Members  
Board of Governors  
Board of Directors  
President  
Management  
Departments and Offices  
Policies and Strategies  
Partners  
Annual Meetings  
History  
FAQs  
Independent Evaluation

**FINANCING OPERATIONS**  
Public Sector (Sovereign) Financing  
Private Sector (Nonsovereign) Financing  
Funds and Resources  
Asian Development Fund  
Investor Information [日本語]

**CONTACTS**  
Headquarters and Field Offices  
Departments, Management and Senior Staff  
External Visitors Program  
Media Contacts  
Information Requests and Feedback  
Public Information Center

**OPPORTUNITIES**  
Careers  
Business Opportunities  
▶ Consulting Services  
ADB-Japan Scholarship Program

**OVERVIEW**

Since its founding in 1966, ADB has been driven by an inspiration and dedication to improving people's lives in Asia and the Pacific. By targeting our investments wisely, in partnership with our developing

Print | Share This

中文

<http://www.adb.org/consulting>

3:40 PM  
04/03/2014

# Information on ADB Projects – Proposed Projects and Approved Projects

The screenshot shows the ADB Projects website interface. The browser address bar displays <http://www.adb.org/projects>. The page features a navigation menu on the left with sections for 'NAVIGATION' (Main, Project Documents, Project Cycle, Operations - Project Design and Management, Success Stories, Featured Projects, Archive, Advanced Search) and 'SEE ALSO' (Country Planning Documents, Evaluation Documents). Below the navigation are RSS feeds for Proposed Projects, Approved Projects, and E-mail Alerts. The main content area is titled 'Projects' and includes a search bar with the text 'Search for project records: keywords, project or approval numbers'. There are tabs for 'Countries', 'Sectors', and 'Themes'. A link for 'DOWNLOAD SOVEREIGN PROJECTS (AS OF FEBRUARY 2014)' is visible. A list of countries is displayed in three columns: Regional, Afghanistan, Armenia, Azerbaijan, Bangladesh, Bhutan, Cambodia, China, People's Republic of, Cook Islands, Fiji, Georgia, India, Indonesia, Kazakhstan, Kiribati, Kyrgyz Republic, Lao People's Democratic Republic, Malaysia, Maldives, Marshall Islands, Micronesia, Federated States of, Mongolia, Myanmar, Nauru, Nepal, Pakistan, Palau, Papua New Guinea, Philippines, Samoa, Solomon Islands, Sri Lanka, Tajikistan, Thailand, Timor-Leste, Tonga, Turkmenistan, Tuvalu, Uzbekistan, Vanuatu, and Viet Nam. At the bottom, there are sections for 'PROPOSED PROJECTS' (3 Mar 2014 | Viet Nam, 42039-035: Power Transmission Investment Program - Tranche 2) and 'APPROVED PROJECTS' (21 Feb 2014 | Regional, 47912-012: Capacity Development for Developing Member Country Banks under the Trade Finance Program). A 'BUSINESS OPPORTUNITIES' section lists Consulting Opportunities, Procurement Notices, and Procurement Plans. The Windows taskbar at the bottom shows various application icons and the system clock indicating 3:41 PM on 04/03/2014.



# Consulting Opportunities – CSRN <http://csrn.adb.org/>

EN Английский (США) Справка

Projects | Asian Development ... CSRN Home Page

Файл Правка Вид Избранное Сервис Справка

**ADB Consultant Management System**  
Consulting Services Recruitment Notice (CSRN)

Search Reset

**TIP** The Consulting Services Recruitment Notice (CSRN) provides detailed information on consulting services required for ADB-financed or administered projects. It includes terms of reference and is posted on ADB's website for periods of at least 7 days (individual consultants), 15 days (firms under ADB-administered projects), and 1 month (firms under EA-administered projects), to give consultants sufficient time to prepare expressions of interest (EOIs) that specifically address project requirements.

Filter to advertisements of interest by ticking the appropriate check boxes and clicking Search. Alternatively, click on the numeric links at the end of each row to view advertisements of the indicated type.

By Country		By Sector		By Consultant Source		By Budget Amount	
<a href="#">Select All</a>	<a href="#">Select None</a>	<a href="#">Select All</a>	<a href="#">Select None</a>	<a href="#">Select All</a>	<a href="#">Select None</a>	<a href="#">Select All</a>	<a href="#">Select None</a>
<input type="checkbox"/> Afghanistan (2)		<input type="checkbox"/> Agriculture and natural resources (20)		<input type="checkbox"/> International (79)		<input type="checkbox"/> Less than \$100,000 (99)	
<input type="checkbox"/> Armenia (1)		<input type="checkbox"/> Education (8)		<input type="checkbox"/> National (68)		<input type="checkbox"/> \$100,000 to \$199,999 (5)	
<input type="checkbox"/> Bangladesh (8)		<input type="checkbox"/> Energy (25)		<b>By Consultant Type</b>		<input type="checkbox"/> \$200,000 to \$299,999 (8)	
<input type="checkbox"/> Bhutan (5)		<input type="checkbox"/> Finance (6)		<a href="#">Select All</a>	<a href="#">Select None</a>	<input type="checkbox"/> \$300,000 to \$399,999 (3)	
<input type="checkbox"/> Cambodia (1)		<input type="checkbox"/> Health and social protection (5)		<input type="checkbox"/> Firm (46)		<input type="checkbox"/> \$400,000 to \$499,999 (2)	
<input type="checkbox"/> China (59)		<input type="checkbox"/> Industry and trade (0)		<input type="checkbox"/> Individual (101)		<input type="checkbox"/> \$500,000 to \$599,999 (3)	
<input type="checkbox"/> Fiji (1)		<input type="checkbox"/> Multisector (28)		<b>By Engagement Period</b>		<input type="checkbox"/> \$600,000 to \$699,999 (0)	
<input type="checkbox"/> Georgia (4)		<input type="checkbox"/> Public sector management (14)		<a href="#">Select All</a>	<a href="#">Select None</a>	<input type="checkbox"/> \$700,000 to \$799,999 (2)	
<input type="checkbox"/> India (35)		<input type="checkbox"/> Transport, and information and communication technology (8)		<input type="checkbox"/> Less than 3 months (13)		<input type="checkbox"/> \$800,000 to \$899,999 (2)	
<input type="checkbox"/> Indonesia (5)		<input type="checkbox"/> Water and other Municipal Infrastructure and Services (12)		<input type="checkbox"/> 3 months to 1 year (83)		<input type="checkbox"/> \$900,000 to \$999,999 (3)	
<input type="checkbox"/> Kazakhstan (1)		<input type="checkbox"/> Others (21)		<input type="checkbox"/> More than 1 year (51)		<input type="checkbox"/> \$1,000,000 to \$1,500,000 (2)	
<input type="checkbox"/> Korea, Republic of (1)						<input type="checkbox"/> Greater than \$1,500,000 (18)	
<input type="checkbox"/> Kyrgyzstan (1)							
<input type="checkbox"/> Lao People's Democratic Republic (3)							
<input type="checkbox"/> Malaysia (1)							
<input type="checkbox"/> Maldives (1)							
<input type="checkbox"/> Micronesia, Federated States of (4)							
<input type="checkbox"/> Mongolia (20)							
<input type="checkbox"/> Myanmar (9)							

3:43 PM  
04/03/2014

# Consultant Management System

The screenshot shows a web browser window displaying the ADB Consultant Management System. The browser's address bar shows the URL: [https://luxdm206.adb.org/OA\\_HTML/adb/adbpos/jsp/ADBCMSLogin.jsp](https://luxdm206.adb.org/OA_HTML/adb/adbpos/jsp/ADBCMSLogin.jsp). The page title is "ADB Consultant Management System".

The main content area is titled "Welcome to the Asian Development Bank's Consultant Management System". It provides an overview of the system and lists user roles:

- Consultants:** create and update their profile, search opportunities, send Expressions of Interest (EOIs), respond to Non-Committal Inquiries (NCIs), and prepare and submit proposals. Some contracts are selected for pilot submission of claims, advances, and contract variations online.
- ADB Project Team Members:** can access all CMS functions like creating a selection, advertising opportunities, sending NCIs, distributing Request for Proposals (RFPs), sending Notice to Proceed (NTPs), and approving requests, even while working outside the ADB network.
- Executing Agencies (EAs):** can access Consulting Services Recruitment Notice (CSRN) to post consulting opportunities for ADB-financed projects. To obtain an EA account, users should email their ADB Project Officer with details: 1. Email address of the agency representative, 2. Full name of the agency representative, 3. Name and address of the agency, 4. Duration of the recruitment for the project.

On the right side, there is a "Login" section with fields for Username and Password, and a "Login" button. Below it is a "Registration" section with buttons for "Register as Consulting Firm" and "Register as Individual Consultant". A "Need Help?" section provides an email address: [cmshelp@adb.org](mailto:cmshelp@adb.org).

At the bottom right, there is a "CMS SYSTEM UPDATE" section with the text: "Dear CMS Users, We are currently testing the new modules on filing claims, requesting advances and forwarding contract variations for selected contracts in CMS."

The browser's taskbar at the bottom shows several open applications: "start", "Business Opportunitie...", "Login - Microsoft Inte...", and "Microsoft PowerPoint ...". The system tray shows the time as 2:24 PM and the date as 10/24/2011.



# Consulting Services – Shortlisted Firms

<http://www.adb.org/site/business-opportunities/operational-procurement/consulting/shortlistprocurement/consulting/shortlist>

The screenshot shows a web browser window displaying the ADB website. The address bar shows the URL: <http://www.adb.org/site/business-opportunities/oj>. The page title is "Shortlisted Firms | Asian De...". The browser's language is set to "EN Английский (США)".

The website header includes the ADB logo and the text "Asian Development Bank" with the tagline "FIGHTING POVERTY IN ASIA AND THE PACIFIC". A search bar is located to the right of the logo.

The main navigation menu includes: About ADB, News & Events, Data & Research, Publications, Countries, Projects, Focus Areas. A secondary navigation bar shows: Business Opportunities, Operational Procurement, Consulting Services, Shortlisted Firms. There are also links for "Print" and "Share This".

The page content is divided into two main sections. On the left, under "Business Opportunities", there is a "NAVIGATION" menu with the following items: Main, Operational Procurement: Consulting Services (with sub-items: Procurement Plans, Shortlisted Firms, Contracts Awarded, Documents on Consulting Services, Indefinite Delivery Contracts), Operational Procurement: Goods, Works, and Related Services, and Institutional Procurement.

The right section is titled "Shortlisted Firms" and has three tabs: "TA and Grants", "Loans", and "Year-to-Date List". The "TA and Grants" tab is selected. Below the tabs, the heading is "Current List of Shortlisted Firms for Technical Assistance and Grant-Financed Projects". The text states: "Consulting firms have been shortlisted for the following technical assistance and grant-financed projects and proposals submission deadlines are indicated for every project. Consultants not shortlisted but interested in being considered for participation in technical proposals should contact the firms directly. Please do not contact ADB."

The list of shortlisted firms is organized by country:

- AFGHANISTAN**
  - Title
  - TA No. 8509-AFG: Multitranches Financing Facility II: Energy Development 2014-2023
- BANGLADESH**
  - Title
  - TA No. 8553-BAN: Road Map to Good Governance (47310-001)

The Windows taskbar at the bottom shows the system clock as 3:44 PM on 04/03/2014, along with various application icons.

# Consulting Services - Contracts awarded

<http://www.adb.org/site/business-opportunities/operational-procurement/consulting/contracts-awarded>

The screenshot shows a web browser window displaying the ADB website. The address bar shows the URL: <http://www.adb.org/site/business-opportunities/operational-procurement/consulting/contracts-awarded>. The page title is "Contracts Awarded—Consulting Services".

The ADB logo is visible at the top left, with the tagline "FIGHTING POVERTY IN ASIA AND THE PACIFIC". The navigation menu includes: Home, 中文, Careers, Site Index, What's New, Independent Evaluation, and Contacts. There are also social media icons for Twitter, Facebook, YouTube, and LinkedIn.

The main content area is titled "Contracts Awarded—Consulting Services" and includes a sub-header: "This section contains contracts awarded for consulting services with contract value above US\$0.1 million." Below this, there are tabs for "Technical Assistance", "Loans", "Grants", and "Archive".

The "Technical Assistance" tab is selected, showing a list of contracts. Each row includes the contract title, the month and year awarded, and download links for PDF and XLS files.

Title	Download Links
Consulting Services: Technical Assistance – Contracts Awarded in January 2014	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in February 2014	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in December 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in October 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in November 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in September 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in August 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in July 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in June 2013	PDF XLS
Consulting Services: Technical Assistance – Contracts Awarded in May 2013	PDF XLS

The left sidebar contains a "NAVIGATION" section with links to "Operational Procurement: Consulting Services", "Operational Procurement: Goods, Works, and Related Services", and "Institutional Procurement".

# Consulting Services – Indefinite Delivery Contracts

<http://www.adb.org/site/business-opportunities/operational-procurement/consulting/idc>

The screenshot shows a Microsoft Internet Explorer browser window displaying the Asian Development Bank (ADB) website. The address bar shows the URL: <http://www.adb.org/site/business-opportunities/operational-procurement/consulting/idc>. The page title is "Indefinite Delivery Contracts - Consulting Services".

The website header includes the ADB logo and the tagline "Asian Development Bank FIGHTING POVERTY IN ASIA AND THE PACIFIC". The navigation menu includes: Home, 中文, Careers, Site Index, What's New, and Contacts. There are also social media links for Twitter, YouTube, LinkedIn, and Facebook.

The main content area is titled "Business Opportunities" and "Indefinite Delivery Contracts". The text describes IDCs as contracts where consultants, firms, or consortia are prequalified and retained for an extended period (normally three to four years) to provide advice on a particular activity. It also mentions that firms/consortia are prequalified using the Consultants Qualification Selection (CQS) method. When there is a requirement for an Indefinite Delivery Contract Assignment (IDCA), three of the pre-qualified firms/consortia would be invited on a rotational basis to submit Bio-data Technical Proposals (BTPs) within an abbreviated period of time where selection could be based on Quality Based (QBS), Quality and Cost Based (QCBS) or Fixed Budget Selection (FBS). The successful firm/consortium could be contracted on a lump sum or time based contract depending on the nature and scope of the IDCA.

The page also features a "NAVIGATION" section with links to Main, Operational Procurement, Consulting Services, Goods, Works, and Related Services, Institutional Procurement, and Contacts. There are also links for Procurement Notices and E-mail Alerts.

# Useful links

- List of ADB Member countries  
<http://www.adb.org/About/membership.asp>
- Consulting Guidelines  
<http://www.adb.org/Documents/Guidelines/Consulting/Guidelines-Consultants.pdf>
- Anticorruption and Integrity <http://www.adb.org/Integrity/>
- Project Administration Instructions  
<http://www.adb.org/Documents/Manuals/PAI/default.asp>
- Project Cycle <http://www.adb.org/Projects/cycle.asp>
- Disclosure at ADB  
<http://www.adb.org/Disclosure/default.asp>
- TA Disbursement Handbook  
<http://www.adb.org/Documents/Handbooks/TADisbursement/tadisbursement.pdf>
- Loan Disbursement Handbook  
[http://www.adb.org/Documents/Handbooks/Loan\\_Disbursement/loan-disbursement-final.pdf](http://www.adb.org/Documents/Handbooks/Loan_Disbursement/loan-disbursement-final.pdf)



# For More Information

[www.adb.org](http://www.adb.org)

<http://www.adb.org/Procurement/contact.asp>

<http://www.adb.org/Consulting/contact.asp>