



# 6<sup>th</sup> ADB Business Opportunities Fair

## Recruitment of Consultants

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



# ADB in 2014

In 2014, Asian Development Bank's (ADB) operations totaled \$22.93 billion, \$13.69 billion financed by ADB and Special Funds and \$9.24 billion by cofinancing partners. The total \$13.69 billion consists of (i) \$12.92 billion in loans, (ii) \$20 million in guarantees, (iii) \$185 million in equity investments, (iv) \$405 million in grants, and (v) \$159 million in technical assistance (TA).

# Top five recipients ranking

The top five recipients including cofinancing are

- 1) India (\$3.46 billion),
- 2) Pakistan (\$3.03 billion),
- 3) People's Republic of China (\$2.76 billion),
- 4) Viet Nam (\$2.36 billion)
- 5) Indonesia (\$1.76 billion).

Excluding cofinancing, the top five recipients are as follows:

- 1) India (\$2.93 billion)
- 2) People's Republic of China (\$1.84 billion)
- 3) Pakistan (\$1.39 billion)
- 4) Viet Nam (\$1.15 billion),
- 5) Philippines (\$0.98 billion)

# Where most opportunities are?

## Strategy 2020 and Mid-term Review (MTR)

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



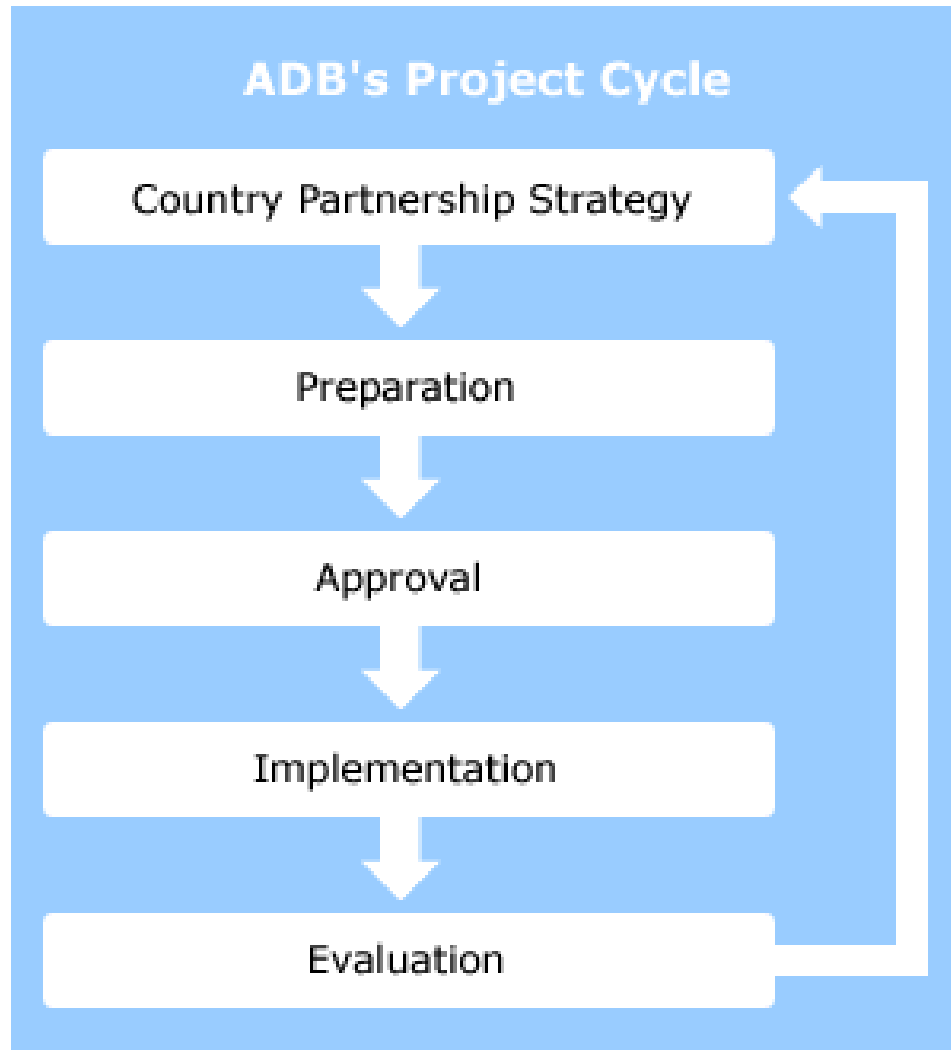


# Limited opportunities for consultants

Health (increase planned)  
Agriculture (food security as  
a focus)  
Disaster and Emergency  
Assistance (climate  
change)



# 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)



**Overall Ranking - ADB Consulting Contracts  
Project Loans & Grants and Technical Assistance  
By Nationality of Consultant**

<b>Rank</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>Amounts in \$ Million</b>	<b>585.31</b>	<b>511.13</b>	<b>555.3</b>
<b>1st</b>	<b>AUS</b>	<b>IND</b>	<b>IND</b>
<b>2nd</b>	<b>USA</b>	<b>AUS</b>	<b>USA</b>
<b>3rd</b>	<b>KOR</b>	<b>USA</b>	<b>AUS</b>
<b>4th</b>	<b>PHI</b>	<b>UKG</b>	<b>VIE</b>
<b>5th</b>	<b>IND</b>	<b>GER</b>	<b>BAN</b>

\*based on Nationality of Bidder  
\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (Loans)

Rank	2012	2013	2014
1 <sup>st</sup>	KOR	IND	IND
2 <sup>nd</sup>	AUS	AUS	VIE
3 <sup>rd</sup>	USA	VIE	BAN
4 <sup>th</sup>	FRA	BAN	USA
5 <sup>th</sup>	CAN	INO	AUS

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (EA Administered Grants)

Rank	2012	2013	2014
1 <sup>st</sup>	AUS	NEP	CAN
2 <sup>nd</sup>	UKG	NET	KOR
3 <sup>rd</sup>	KOR	AUS	NEP
4 <sup>th</sup>	GER	GER	USA
5 <sup>th</sup>	NEP	LAO	SWE

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (ADB Administered Grants)

Rank	2012	2013	2014
1 <sup>st</sup>	UKG	CAM	PHI
2 <sup>nd</sup>	NET	USA	SWI
3 <sup>rd</sup>	IND	BAN	CAM
4 <sup>th</sup>	CAM	IND	VIE
5 <sup>th</sup>	AUS	PHI	NZL

\*based on Nationality of Bidder

\*\* ADB has 67 member countries

# Procurement Ranking Consulting Services (TAs)

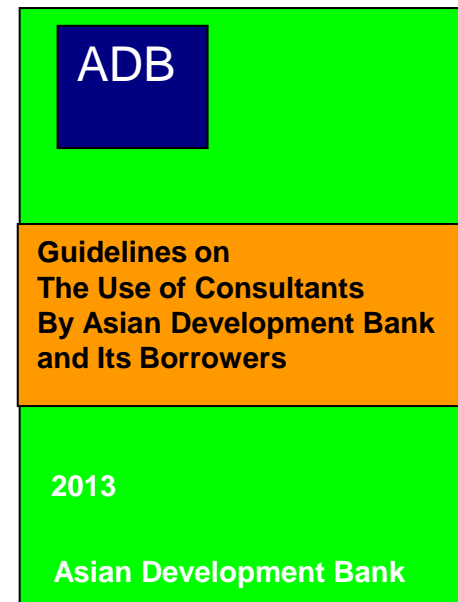
Rank	2012	2013	2014
1 <sup>st</sup>	PHI	AUS	AUS
2 <sup>nd</sup>	AUS	USA	USA
3 <sup>rd</sup>	UKG	UKG	IND
4 <sup>th</sup>	USA	IND	UKG
5 <sup>th</sup>	IND	INO	GER

\*based on Nationality of Bidder

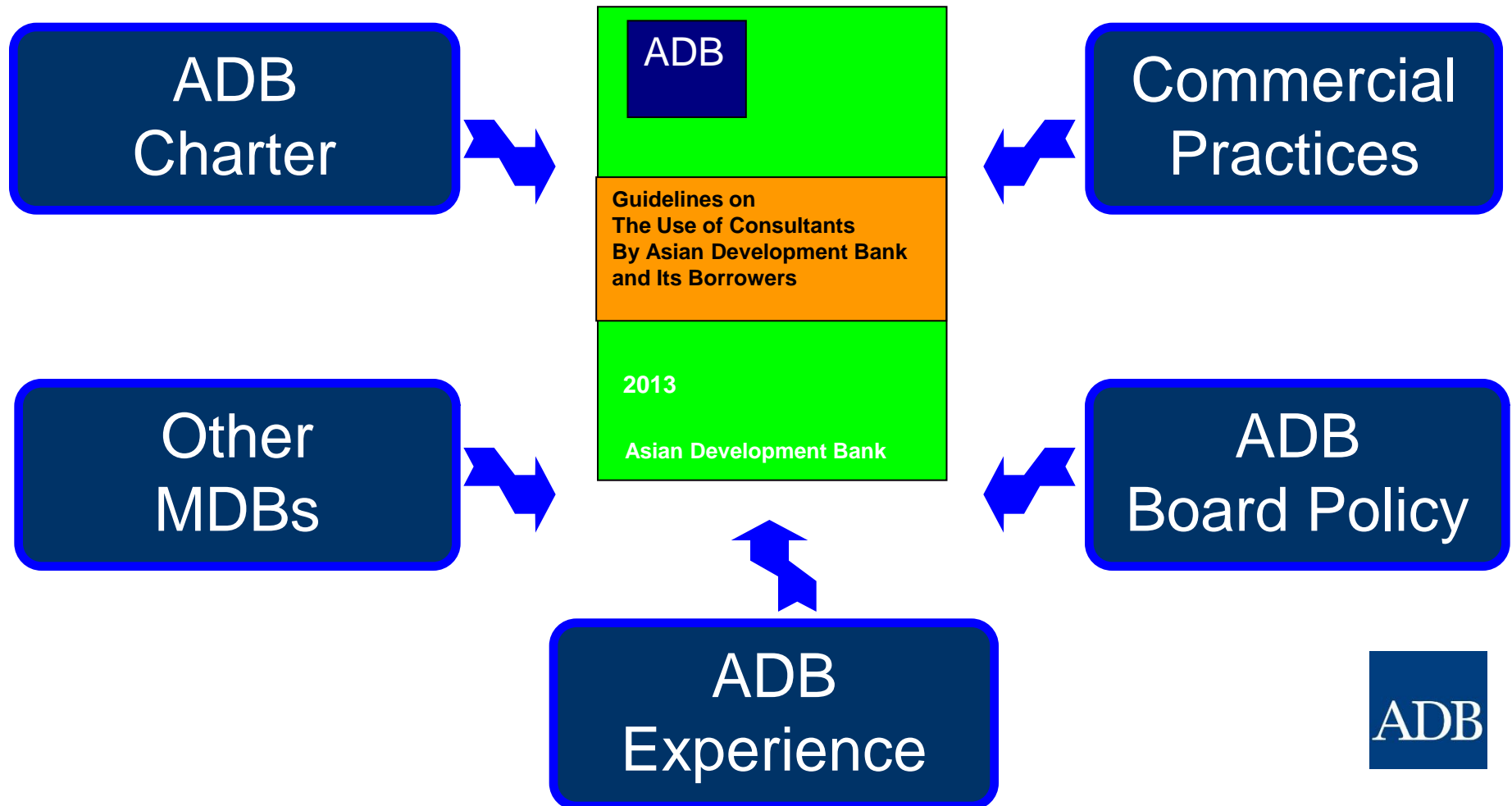
\*\* ADB has 67 member countries

# 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
- Results-based lending/ Use of country systems
- 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 9 March 2015, the group has 3563 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	$\geq 750$ out of 1000	Lowest priced	Firm with lowest priced responsive proposal wins
QCBS – Quality and Cost based selection	$\geq 750$ 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	$\geq 750$ out of 1000 And Highest Technical Score	$\leq$ budget	Firm with the best technical proposal and the financial proposal within the budget wins
QBS – Quality Based Selection	$\geq 750$ 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 $\geq 750$ out of 1000		Negotiations are conducted with the firm that presented the best expression of interest
SSS – Single Source Selection	$\geq 750$ 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).
- Since January 2009, the system also allows advertisements of Staff Consulting Assignments, Indefinite Delivery Contracts and Special Assignments.
- Since 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

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

Navigation menu: About ADB | News & Events | Data & Research | Publications | Countries | Projects | Focus Areas

**Business Opportunities**

- Main
- Operational Procurement: Consulting Services
- Procurement Plans
- Shortlisted Firms
- Contracts Awarded - Consulting Services
- Documents on Consulting Services
- Indefinite Delivery Contracts
- Operational Procurement: Goods, Works, and Related Services
- Institutional Procurement
- Transaction Advisory Services
- Contacts

## Operational Procurement: Consulting Services



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### 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 \(CMS\)](#)

### Latest Consulting Services Recruitment Notices

### 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

Visit the [ADB Consultants' Network](#) on LinkedIn to find national or international contacts with whom to form alliances. The site is open to both individuals and company representatives. [Join the group](#)

Windows taskbar: 7:53 AM, 10/03/2015



# CMS Online Training

The screenshot displays the ADB ConsultantTutor website in a web browser. The browser's address bar shows the URL: [https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary482578740021056D.nsf/h\\_Toc/26](https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary482578740021056D.nsf/h_Toc/26). The website header features the ADB ConsultantTutor logo and a 'Log In' link. A navigation bar includes links for HOME, INDIVIDUALS, and FIRMS, along with a search bar labeled 'Search this place'. On the left, an 'Info Center' sidebar lists 'Home', 'Guides for Consulting Firms', and 'FAQs for Consulting Firms'. Below this is a 'support' section with a headset icon, email address 'cmshelp@adb.org', and support hours '08:00 - 17:00 (GMT+8)'. The main content area, titled 'You are in consultanttutor>Firms', features a section for 'Consulting Firms' with a paragraph about the October 2010 roll-out and a May 2012 update. Below this is a 'Consulting Firm Quick Reference Guides' list containing 11 items, each preceded by a small icon. The Windows taskbar at the bottom shows various application icons and the system clock indicating 7:54 AM on 10/03/2015.

ADB ConsultantTutor

Log In

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- 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 consultanttutor>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
- Registration of Consulting Firms
- Adding and Modifying Payment Information
- Timesheets, Deliverables & Claims Guide for Individual Time-based Staff Consultants engaged through a Firm
- Guide in Submitting Advances for Individual Staff Consultants engaged through a Firm
- Submitting Contract Variation Requests

# CMS Online Training

The screenshot displays the ADB ConsultantTutor website in a web browser. The browser's address bar shows the URL: [https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740020CC60.nsf/h\\_Toc/fz](https://wpqr4.adb.org/LotusQuickr/consultanttutor/PageLibrary48257B740020CC60.nsf/h_Toc/fz). The website header features the ADB logo and the text "ConsultantTutor" in a large, bold font. Below the header is a navigation bar with links for "HOME", "INDIVIDUALS", and "FIRMS", along with a search bar labeled "Search this place".

The main content area is titled "You are in consultantutor>Individuals". It features a sidebar on the left with an "Info Center" section containing links to "Home", "Guides for Individual Consultants", and "FAQs for Individual Consultants". Below this is a "support" section with a headset icon, the email address [cmshelp@adb.org](mailto:cmshelp@adb.org), and support hours: "08:00 - 17:00 (GMT+8)".

The main content area is titled "Individual Consultants" and includes a paragraph stating: "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 is a section titled "Individual Consultant Quick Reference Guides" with a list of links: "CMS Basics", "Searching Opportunities and Submitting EOIs", "Responding to Non-Committal Inquiries", "Registration of Individual Consultants", "Adding and Modifying Payment Information", "Timesheets, Deliverables & Claims Guide for Individual Time-based Staff Consultants", "Guide in Submitting Advances for Individual Staff Consultants", and "Submitting Contract Variation Requests".

At the bottom of the main content area is a "Video" section with a list of video titles: "Submitting EOIs and Responding to Non-Committal Inquiries", "Entering Payment Information", "Entering Timesheets", and "Submitting Claims".

The browser's taskbar at the bottom shows various application icons, including the Windows Start button, Internet Explorer, File Explorer, and several other programs. The system tray on the right indicates the date and time: "10/03/2015 7:55 AM".

# 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 contact information for inquiries regarding the system, including the email [cmshelp@adb.org](mailto:cmshelp@adb.org).
- CMS SYSTEM UPDATE:** A section titled "CMS SYSTEM UPDATE" with a message from the CMS Team. It states: "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". A note at the bottom of this section states: "NOTE: CMS undergoes weekly maintenance activities from 11 p.m. Saturday until 8 a.m. Sunday following morning (Manila time, GMT+8)."
- Consulting Services Recruitment Notice (CSRN):** A section titled "Consulting Services Recruitment Notice (CSRN)" providing detailed information on the consulting services required for ADB-financed or administered projects. It states: "The CSRN includes the terms of reference and is posted on ADB's website for at least one month for firms for EA-administered projects, 15 days for firms for ADB-administered projects or 7 days for individual consultants before shortlisting. This will provide consultants sufficient time to prepare EOIs that are more specific and focused on the project's requirements. Click here to view the list of advertisements of consulting opportunities." A blue arrow points from the "Click here" link to the "Consulting Services Recruitment Notice (CSRN)" section header.
- Browser Compatibility:** A section titled "Browser Compatibility" stating "CMS works best using the following browsers:" and listing: "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".

The browser window also shows a menu bar with "Файл", "Правка", "Вид", "Избранное", "Сервис", and "Справка". The taskbar at the bottom displays various application icons and the system clock showing 3:38 PM on 04/03/2014.

# ADB Business Opportunities – Where to Find?

https://uxdmz06.adb.org/OA\_HTML/OA.jsp?OAFunc=XXCRS\_CSRN\_HOME\_PAGE

ADB Operational Procurement: Co... CSRN Home Page

## 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.

Search		By Sector		By Eligibility of Consultant Country		By Engagement Period	
By Country		Select All	Select None	Select All	Select None	Select All	Select None
<input type="checkbox"/> Afghanistan (2)		<input type="checkbox"/> Agriculture, natural resources and rural development (21)		<input type="checkbox"/> Open to Member Countries Only (156)		<input type="checkbox"/> Less than 3 months (17)	
<input type="checkbox"/> Armenia (2)		<input type="checkbox"/> Education (3)		<input type="checkbox"/> Non-Member Countries Allowed (0)		<input type="checkbox"/> 3 months to 1 year (79)	
<input type="checkbox"/> Azerbaijan (1)		<input type="checkbox"/> Energy (12)		<b>By Consultant Source</b>		<input type="checkbox"/> More than 1 year (60)	
<input type="checkbox"/> Bangladesh (2)		<input type="checkbox"/> Finance (2)		Select All	Select None	<b>By Budget Amount</b>	
<input type="checkbox"/> Brunei Darussalam (1)		<input type="checkbox"/> Health (10)		<input type="checkbox"/> International (72)		Select All	Select None
<input type="checkbox"/> Cambodia (14)		<input type="checkbox"/> Industry and trade (5)		<input type="checkbox"/> National (84)		<input type="checkbox"/> Less than \$100,000 (110)	
<input type="checkbox"/> China (10)		<input type="checkbox"/> Information and communication technology (0)		<b>By Consultant Type</b>		<input type="checkbox"/> \$100,000 to \$199,999 (13)	
<input type="checkbox"/> Georgia (5)		<input type="checkbox"/> Multisector (4)		Select All	Select None	<input type="checkbox"/> \$200,000 to \$299,999 (4)	
<input type="checkbox"/> India (8)		<input type="checkbox"/> Public sector management (37)		<input type="checkbox"/> Firm (49)		<input type="checkbox"/> \$300,000 to \$399,999 (3)	
<input type="checkbox"/> Indonesia (2)		<input type="checkbox"/> Transport (15)		<input type="checkbox"/> Individual (107)		<input type="checkbox"/> \$400,000 to \$499,999 (2)	
<input type="checkbox"/> Kyrgyz Republic (2)		<input type="checkbox"/> Water and other urban infrastructure and services (21)				<input type="checkbox"/> \$500,000 to \$599,999 (4)	
<input type="checkbox"/> Lao People's Democratic Republic (8)		<input type="checkbox"/> Others (21)				<input type="checkbox"/> \$600,000 to \$699,999 (4)	
<input type="checkbox"/> Malaysia (1)						<input type="checkbox"/> \$700,000 to \$799,999 (1)	
<input type="checkbox"/> Marshall Islands (2)						<input type="checkbox"/> \$800,000 to \$899,999 (1)	
<input type="checkbox"/> Mongolia (2)						<input type="checkbox"/> \$900,000 to \$999,999 (3)	
<input type="checkbox"/> Myanmar (5)						<input type="checkbox"/> \$1,000,000 to \$1,500,000 (6)	
<input type="checkbox"/> Nepal (10)						<input type="checkbox"/> Greater than \$1,500,000 (5)	
<input type="checkbox"/> Pakistan (1)							
<input type="checkbox"/> Papua New Guinea (1)							
<input type="checkbox"/> Philippines (21)							

# Business Opportunities – Quick Links

The screenshot displays the Asian Development Bank (ADB) website. The browser's address bar shows the URL <http://www.adb.org/about/main>. The ADB logo and name are prominently displayed at the top left. Navigation links for '中文', 'Careers', 'Contacts', 'e-Alerts', and 'Follow ADB' are located at the top right, alongside a search bar. A horizontal menu bar contains links to 'About ADB', 'News & Events', 'Data & Research', 'Publications', 'Countries', 'Projects', and 'Focus Areas'. The main content area is organized into three columns. The left column lists organizational information such as 'Overview', 'Key Facts', 'Members', 'Board of Governors', 'Board of Directors', 'President', 'Management', 'Departments and Offices', 'Knowledge Management', 'Policies and Strategies', 'Partners', 'Annual Meetings', 'History', and 'FAQs'. The middle column, titled 'Financing Operations', includes links for 'Public Sector (Sovereign) Financing', 'Private Sector (Nonsovereign) Financing', 'Funds and Resources', 'Asian Development Fund', 'ASEAN Infrastructure Fund', and 'Investor Information'. Below this, under the heading 'Opportunities', are links for 'Careers', 'Business Opportunities', 'Consulting Services', and 'ADB-Japan Scholarship Program'. A large blue arrow points from the 'Business Opportunities' link to the 'About ADB' link in the top navigation bar. The right column, titled 'Transparency', lists links for 'Access to Information', 'Accountability Mechanism', 'ADB and Civil Society', 'Anticorruption and Integrity', 'Development Effectiveness and Results', 'Safeguards', and 'Independent Evaluation'. The Windows taskbar at the bottom shows the system clock as 7:57 AM on 10/03/2015.

ADB ASIAN DEVELOPMENT BANK

中文 Careers Contacts e-Alerts Follow ADB

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
- Knowledge Management
- Policies and Strategies
- Partners
- Annual Meetings
- History
- FAQs

Financing Operations

- Public Sector (Sovereign) Financing
- Private Sector (Nonsovereign) Financing
- Funds and Resources
- Asian Development Fund
- ASEAN Infrastructure Fund
- Investor Information [日本語]

Opportunities

- Careers
- Business Opportunities
- Consulting Services
- ADB-Japan Scholarship Program

Transparency

- Access to Information
- Accountability Mechanism
- ADB and Civil Society
- Anticorruption and Integrity
- Development Effectiveness and Results
- Safeguards
- Independent Evaluation



# Information on ADB Projects – Proposed Projects and Approved Projects

The screenshot shows the ADB Projects website. The browser address bar displays <http://www.adb.org/projects>. The ADB logo and "ASIAN DEVELOPMENT BANK" are visible in the top left. The top navigation bar includes links for "中文", "Careers", "Contacts", "e-Alerts", and "Follow ADB". A search bar is located on the right. The main navigation menu includes "About ADB", "News & Events", "Data & Research", "Publications", "Countries", "Projects", and "Focus Areas". The "Projects" tab is selected. On the left side of the "Projects" page, there is a sidebar with links: "Projects Overview", "Show Proposed Projects", "Show Approved Projects", "Project Documents", "Project Cycle", "Operations", "Results", "Using ADB Project Data", "Archive", and "Advanced Search". A blue arrow points from the "Show Proposed Projects" link to the "Projects" tab. The main content area displays a grid of country links under the heading "Countries". The countries listed are: Afghanistan, Armenia, Azerbaijan, Bangladesh, Bhutan, Cambodia, China, People's Republic of, Cook Islands, Kiribati, Kyrgyz Republic, Lao People's Democratic Republic, Malaysia, Maldives, Marshall Islands, Micronesia, Federated States of, Mongolia, Myanmar, Philippines, Samoa, Solomon Islands, Sri Lanka, Tajikistan, Thailand, Timor-Leste, Tonga, and Turkmenistan.

ADB ASIAN DEVELOPMENT BANK

中文 Careers Contacts e-Alerts Follow ADB

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

Projects Overview  
Show Proposed Projects  
Show Approved Projects  
Project Documents  
Project Cycle  
Operations  
Results  
Using ADB Project Data  
Archive  
Advanced Search

Countries

Afghanistan	Kiribati	Philippines
Armenia	Kyrgyz Republic	Samoa
Azerbaijan	Lao People's Democratic Republic	Solomon Islands
Bangladesh	Malaysia	Sri Lanka
Bhutan	Maldives	Tajikistan
Cambodia	Marshall Islands	Thailand
China, People's Republic of	Micronesia, Federated States of	Timor-Leste
Cook Islands	Mongolia	Tonga
	Myanmar	Turkmenistan

# 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://uxdm206.adb.org/OA\\_HTML/adb/adbpos/jsp/ADBCMSLogin.jsp](https://uxdm206.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 describes the CMS as an integrated web-based system for recruiting consulting services. The page is divided into sections for different 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 funded through internal resources budget (Staff Consulting -SC) are selected to pilot submitting claims, advances and contract variation requests online. If your contract is selected, its details will appear in the new Contracts tab. We expect to roll out contract administration module for all staff consulting contracts in January 2013. Consultants engaged for Technical Assistance and Grant projects would still not have this option, pending integration with the ADB's Financial system for managing TA and Grant resources. [Click here to know who can register as consultants in CMS.](#) By using this service, you are accepting the [CMS Terms and Conditions](#).
- ADB Project Team Members:** can access all CMS functions like creating a selection, advertising opportunities, sending Non-Committal Inquiries (NCIs), distributing Request for Proposals (RFPs), sending Notice to Proceed (NTPs), and approving requests, even while working outside of the ADB network. Login to the system by typing in your ADB Self-Service Username and Password.
- Executing Agencies (EAs):** can access Consulting Services Recruitment Notice (CSRN) to post consulting opportunities for ADB-financed projects. Login to the system by typing in your registered Username and Password. To obtain an EA account, email your ADB Project Officer and copy [csrn@adb.org](mailto:csrn@adb.org) with the following 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

The right sidebar contains a "Login" section with fields for Username and Password, a "Login" button, and a link "Can't access your account?". Below this is a "Registration" section with a "New user? Register now!" link and two buttons: "Register as Consulting Firm" and "Register as Individual Consultant". At the bottom of the sidebar is a "Need Help?" section with a link to email [cmshelp@adb.org](mailto:cmshelp@adb.org) for inquiries.

The bottom of the page features 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 the Start button and several open applications: "Business Opportunitie...", "Login - Microsoft Inte...", and "Microsoft PowerPoint ...". The system clock in the bottom right corner shows "2:24 PM".



# Consulting Services – Shortlisted Firms

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

The screenshot displays the ADB (Asian Development Bank) website. The browser address bar shows the URL: <http://www.adb.org/site/business-opportunities/operational-procurement/consulting>. The page title is "Operational Procurement: Consulting Services". The main content area features a silhouette image of three people in discussion. Below the image are social media links for Facebook, Twitter, LinkedIn, Print, and Bookmark. The "Overview" section states: "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 prepare studies, appraisals, and reports." The right sidebar includes a "Key Document" section with a link to "Guidelines on the Use of Consultants by Asian Development Bank and Its Borrowers", an "Online Training" section with links to "Videos and Guides on how to use CMS for Consulting Firms" and "Videos and Guides on how to use CMS for Individual Consultants", and a "LinkedIn" section with a link to "Visit the ADB Consultants' Network on LinkedIn to find national or international". The bottom of the page shows a Windows taskbar with various application icons and a system clock indicating 8:00 AM on 10/03/2015.

ADB ASIAN DEVELOPMENT BANK

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Business Opportunities

Main

Operational Procurement: Consulting Services

Procurement Plans

Shortlisted Firms

Contracts Awarded - Consulting Services

Documents on Consulting Services

Indefinite Delivery Contracts

Operational Procurement: Goods, Works, and Related

## Operational Procurement: Consulting Services

FACEBOOK TWITTER LINKEDIN PRINT BOOKMARK

### 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 prepare studies, appraisals, and reports.

### 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

Visit the ADB Consultants' Network on LinkedIn to find national or international



# Consulting Services - Contracts awarded

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

ADB ASIAN DEVELOPMENT BANK

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Contracts Awarded - Consulting Services

Documents on Consulting Services

Indefinite Delivery Contracts

Operational Procurement: Goods, Works, and Related Services

### Contracts Awarded - Consulting Services

FACEBOOK TWITTER LINKEDIN PRINT BOOKMARK

This section contains contracts awarded for consulting services with contract value above US\$0.1 million.

Technical Assistance Loans Grants Archive

Title	File
Consulting Services: Technical Assistance – Contracts Awarded in January 2015	pdf (81.73 KB)   xlsx (15.65 KB)
Consulting Services: Technical Assistance – Contracts Awarded in December 2014	pdf (70.16 KB)   xlsx (14.1 KB)
Consulting Services: Technical Assistance – Contracts Awarded in November 2014	pdf (83.03 KB)   xlsx (14.43 KB)
Consulting Services: Technical Assistance – Contracts Awarded in October 2014	pdf (86.25 KB)   xlsx (15.13 KB)
Consulting Services: Technical Assistance – Contracts Awarded in September 2014	pdf (88.18 KB)   xlsx (15.29 KB)
Consulting Services: Technical Assistance – Contracts Awarded in August 2014	pdf (91.32 KB)   xlsx (15.63 KB)

EN 8:01 AM 10/03/2015

# 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>