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**ADB**

## Selection of Consultant

### Consulting Opportunities in ADB Financed Projects

**BUSINESS OPPORTUNITIES**

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## Why are consultants needed?

**ADB**

The organization or government....

does not have the particular expertise of its own;

Or

has shortage of in-house resources which are required only for a specific period

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## Consulting Services Contracts 2018 – 2020



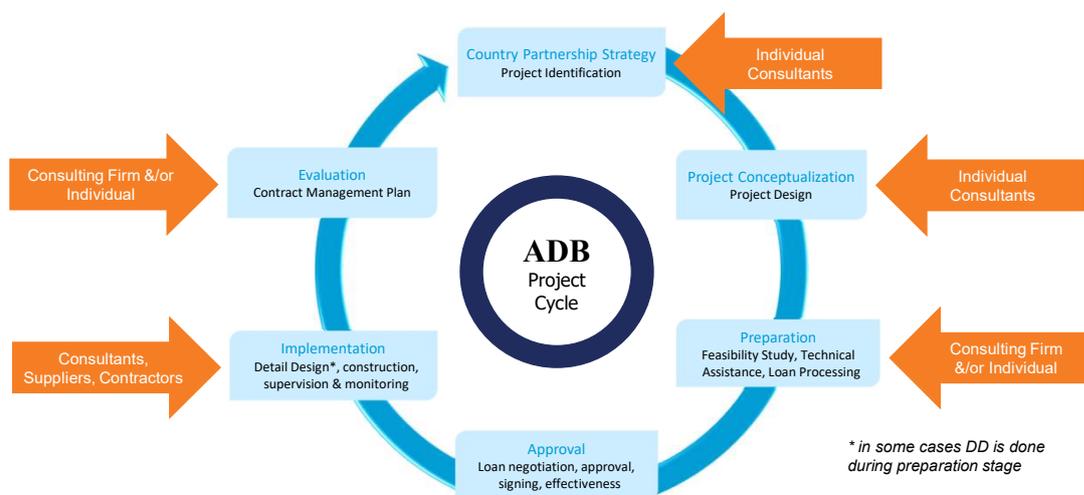
Type	2018		2019		2020	
	No.	\$	No.	\$	No.	\$
Loan	3,724	12.2B	3,397	14.1B	3,165	22.5B
Grant	1,336	741M	1,374	552M	1,255	996M
TA	2,950	226M	3,152	223M	2,814	207M

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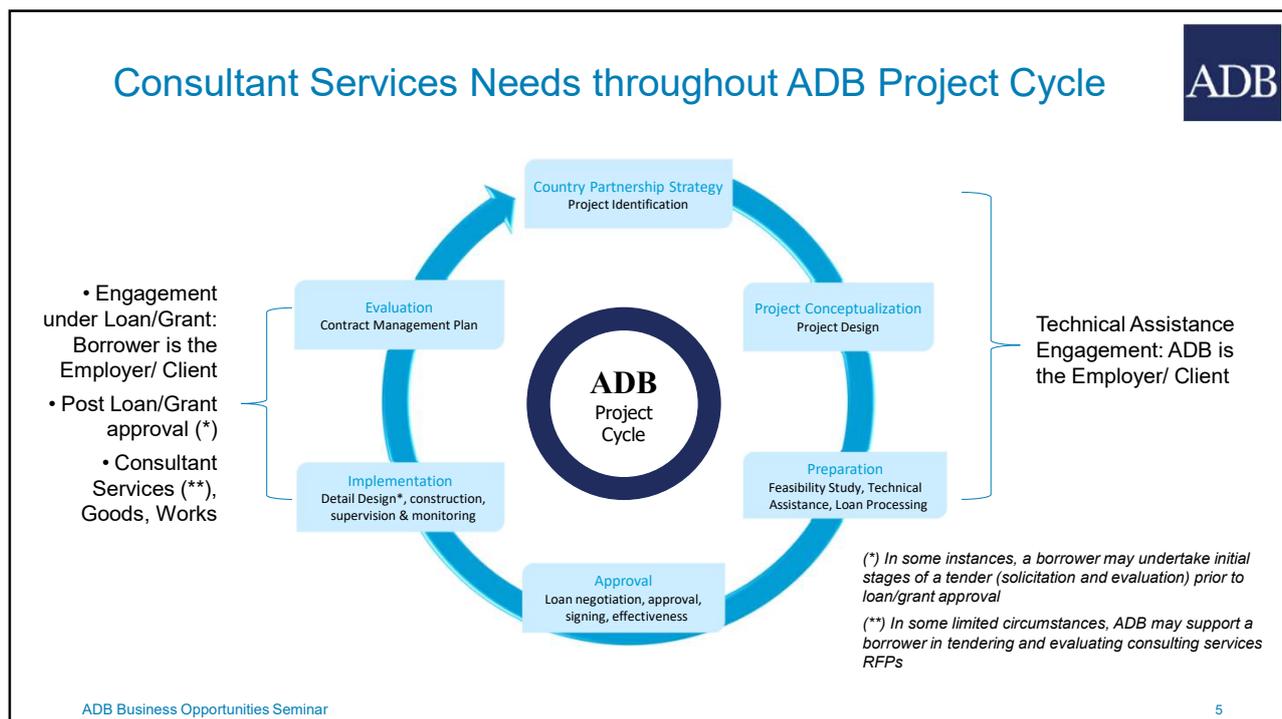
## Consultant Services Needs throughout ADB Project Cycle



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## Selection Methods for Consulting Services



Open Competitive Bidding (OCB) = Quality and Cost-Based Selection (QCBS)

- The preferred Method
- Follows a one-stage two-envelope (1S2E) approach
- Uses weighted scoring system: Technical : Financial (70:30 or 80:20 or 90:10)
- Technical score of 750 out of 1000pts is needed to progress to Financial evaluation

General

- All firm and Individual Consulting Services opportunities are advertised on CMS
- Contracts: Time-Based or Lump Sum, single or multiple assignment based on Framework Agreement
- A Full, Simplified or Bio-data technical proposal (FTP or STP or BTP) may be requested
- ToR's may be input-based (conformance) or output-based (performance)

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## Other Selection Methods for Consulting Services




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## Selection Methods for Consulting Services (cont'd)



Selection Method	Technical Proposal Evaluation	Financial Proposal	Selection procedure
QCBS – Quality and Cost based selection	>= 750 out of 1000	Competitive Default Quality-cost ratio is 80:20. Can be changed to 70:30; 90:10 or 50:50 (audit))	Firm representing the best combination of quality and price wins
LCS – Least Cost Selection	>= 750 out of 1000	Lowest priced	Firm with lowest priced responsive proposal 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

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## RFP for Selection of Consultant by ADB



Section 1: Letter of Invitation	Describes firms invited, contents of RFP package and associated Information
Section 2: Definitions	Definitions or terms contained in the remainder of the RFP documents
Section 3: Instructions to Consultants	Specifies the rules to be followed by firms in the preparation and submission of Proposals. It also contains details on submission, opening, evaluation and award.
Section 4: Data Sheet	Specific tendering conditions that may augment or supplement the contents of Section 3
Section 5: Evaluation Criteria	The evaluation criteria applicable for the assignment
Section 6: Standard Forms for Proposal Submission	The forms (including related instructions) to be completed and submitted by the firm
Section 7: Terms of Reference	The Terms of Reference for the assignment
Section 8: Standard Form of Contract	The Standard Form of Contract to be used for the assignment
Section 9: List of ADB Member Countries	List of ADB member Countries

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## RFP for Selection of Consultant by Borrower



Section 1: Letter of Invitation	A template of a letter from the Client addressed to a shortlisted firm inviting it to submit a proposal for a consulting assignment
Section 2: Instructions to Consultants incl. Data Sheet	Consists of two parts: "Instructions to Consultants" and "Data Sheet". "Instructions to Consultants" contains provisions to be used without modification. "Data Sheet" contains information specific to the RFP that may augment or supplement the information in the Instructions to Consultants
Section 3: Technical Proposal – Standard Forms	Contains the technical proposal forms to be submitted by the firm
Section 4: Financial Proposal – Standard Forms	Contains the financial proposal forms to be submitted by the firm
Section 5: Eligible Countries	Contains Information regarding eligible countries for the provision of the Services
Section 6: Anticorruption Policy; Standards of Conduct	ADB's policy in regard to corrupt and fraudulent practices, and the conduct of all parties involved in the selection process and the execution of the contract.
Section 7: Terms of Reference	The Terms of Reference for the assignment
Section 8: Conditions of Contract and Contract Forms	The Standard Form of Contract to be used for the assignment (Time-based or Lump sum). Includes general conditions and contract specific special conditions

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## Stages in Consultant Recruitment

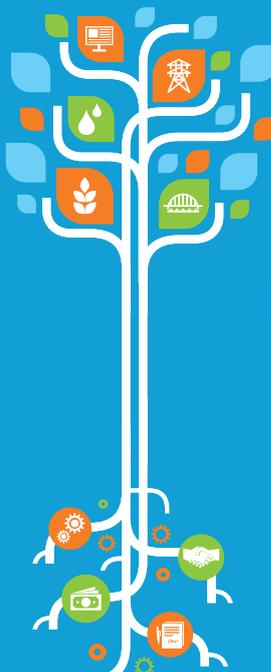


Advertising	Issuance of a Consulting Services Recruitment Notice (CSRN) Receipt of Expressions of Interest (EOI)
Shortlist	List of Respondents suitable to be invited to RFP
RFP	Issuance of Bidding Documents Receipt and Response to Queries received during RFP
Evaluation	Technical Evaluation – Proposals receiving >750/1000 proceed; Financial Evaluation – Firm with best combined Tech/Fin Score selected
Negotiation	Invitation to Negotiations (face-to-face or virtual) Agreement on all components of Draft Contract
Contract Signature	Contract Signing Issuance of Notice to Proceed

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# Finding Consulting Opportunities



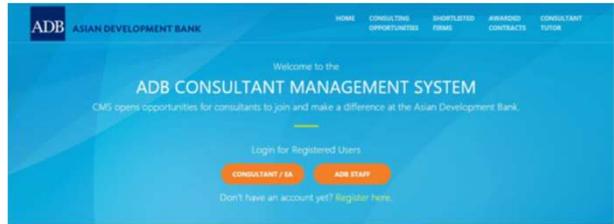
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## Consultant Management System (CMS) Website



- Consulting opportunities are visible through ADB's Consultant Management System (CMS) (<http://cms.adb.org>)
- Firms need to register for alerts to receive notices of all consulting opportunities
- Advertisement of Consulting opportunities (both EA and ADB) are through CMS.
- The RFP process for ADB Administered Contracts is through CMS(\*)

(\*) EA's use their own country systems when tendering for Consulting services; still need to meet ADB requirements




<p><b>Search Consulting Opportunities</b></p> <p>Get detailed information on consulting services requirements and send expression of interests (EOI) for ADB-financed or administered projects.</p>	<p><b>View Shortlisted Firms</b></p> <p>ADB publishes the names and contact details of firms invited to submit proposals. This is for the information of consultants who wish to associate with them. Interested consultants should contact the firms directly.</p>	<p><b>View Awarded Contracts</b></p> <p>ADB Project contracts that are awarded to consulting firms are disclosed to the public. Visit the page to view the list of contracts awarded to consulting firms, along with associated contract details.</p>
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# Consulting Services Recruitment Notices on CMS



## Consulting Opportunities

Consulting Services Recruitment Notices (CSRN)

[Search](#) [Reset](#)

CSRN provides detailed information on consulting services required for ADB-financed or administered projects, including terms of reference. Filter to specific 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			
<b>By Country</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Regional (52) <input type="checkbox"/> Afghanistan (12) <input type="checkbox"/> Armenia (1) <input type="checkbox"/> Australia (1) <input type="checkbox"/> Bangladesh (16) <input type="checkbox"/> Bhutan (2) <input type="checkbox"/> Cambodia (5) <input type="checkbox"/> China (18) <input type="checkbox"/> Fiji (2) <input type="checkbox"/> Georgia (10) <input type="checkbox"/> India (11) <input type="checkbox"/> Indonesia (4) <input type="checkbox"/> Kiribati (1) <input type="checkbox"/> Kyrgyz Republic (12) <input type="checkbox"/> Lao People's Democratic Republic (5) <input type="checkbox"/> Maldives (1) <input type="checkbox"/> Micronesia, Federated States of (1) <input type="checkbox"/> Mongolia (8) <input type="checkbox"/> Myanmar (3) <input type="checkbox"/> Nepal (6) <input type="checkbox"/> Pakistan (10) <input type="checkbox"/> Papua New Guinea (2) <input type="checkbox"/> Philippines (23) <input type="checkbox"/> Sri Lanka (2) <input type="checkbox"/> Tajikistan (2) <input type="checkbox"/> Thailand (1) <input type="checkbox"/> Tonga (1) <input type="checkbox"/> Uzbekistan (4) <input type="checkbox"/> Vanuatu (1) <input type="checkbox"/> Viet Nam (3)	<b>By Sector</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Agriculture, natural resources and rural development (28) <input type="checkbox"/> Education (11) <input type="checkbox"/> Energy (14) <input type="checkbox"/> Finance (17) <input type="checkbox"/> Health (2) <input type="checkbox"/> Industry and trade (12) <input type="checkbox"/> Information and communication technology (2) <input type="checkbox"/> Multisector (2) <input type="checkbox"/> Public sector management (12) <input type="checkbox"/> Transport (28) <input type="checkbox"/> Water and other urban infrastructure and services (21) <input type="checkbox"/> Uncategorized (20)	<b>By Eligibility of Consultant Country</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Open to Member Countries Only (127)	<b>By Engagement Period</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Less than 3 months (8) <input type="checkbox"/> 3 months to 1 year (125) <input type="checkbox"/> More than 1 year (14)
		<b>By Consultant Source</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> International (28) <input type="checkbox"/> National (92)	<b>By Budget Amount</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Less than \$100,000 (134) <input type="checkbox"/> \$100,000 to \$199,999 (16) <input type="checkbox"/> \$200,000 to \$299,999 (8) <input type="checkbox"/> \$300,000 to \$399,999 (9) <input type="checkbox"/> \$400,000 to \$499,999 (2) <input type="checkbox"/> \$500,000 to \$599,999 (1) <input type="checkbox"/> \$600,000 to \$699,999 (0) <input type="checkbox"/> \$700,000 to \$799,999 (4) <input type="checkbox"/> \$800,000 to \$899,999 (2) <input type="checkbox"/> \$900,000 to \$999,999 (1) <input type="checkbox"/> \$1,000,000 to \$1,500,000 (3) <input type="checkbox"/> Greater than \$1,500,000 (0)
<b>By Consultant Type</b> <a href="#">Select All</a>   <a href="#">Select None</a> <input type="checkbox"/> Firm (22) <input type="checkbox"/> Individual (145)			
<b>By Expertise</b> <input type="text"/> Enter the exact text to further filter your search by expertise			

# Consulting Services Recruitment Notices on CMS



## Consulting Opportunities

Consulting Services Recruitment Notices (CSRN)

[Back](#)

Click icon on the last column to display the advertisement or click on the project name for information about the project. You can sort advertisements by clicking on the headers.

Project	Sector	Consultant Source	Consultant Type	Open to non-Member Countries	Expertise	Engagement Period	Budget in USD	Published	Deadline (Manila local time)	Remarks	View CSRN
<a href="#">GRANT 50281-001 TON: Introducing eGovernance through Digital Health - C-01 Implementation Firm</a>	Health	International	Firm	No	Digital Health Information System	36 Months	6,000,000	23-Mar-2019	17-Apr-2019 11:59 PM		
<a href="#">LOAN 51035-001 PNG: Health Services Sector Development Program, Subprogram 1 - 1 Strengthening Medical Supplies Procurement and Supply Chain Management</a>	Health	International	Firm	No	Medical Supplies Procurement and Supply Chain Management	24 Months	2,075,000	20-Mar-2019	11-Apr-2019 11:59 PM		
<a href="#">LOAN 41509-013 PNG: Health Services Sector Development Project - 1 Strengthening Medical Supplies Procurement and Supply Chain Management</a>	Health	International	Firm	No	Medical Supplies Procurement and Supply Chain Management	24 Months	2,075,000	13-Mar-2019	11-Apr-2019 11:59 PM		



# Consulting Services Recruitment Notices on CMS

GRANT 50281-001 TON: Introducing eGovernance through Digital Health - C-01 Implementation Firm  
 Date Published: 23-Mar-2019 Deadline of Submitting EOI: 17-Apr-2019 11:59 PM Manila local time

Express Interest

Profile Terms of Reference Cost Estimate

**Selection Profile**

Consultant Type	<b>Firm</b>	Source	<b>International</b>
Selection Method	<b>Quality and Cost-Based Selection (QCBS)</b>	Technical Proposal	<b>Full Technical Proposal (FTP)</b>
Selection Title	Introducing eGovernance through Digital Health		
Package Number	<b>C-01</b>	Package Name	<b>Implementation Firm</b>
Advance Action	<input checked="" type="radio"/> Yes <input type="radio"/> No	Approval Number	
Engagement Period	<b>36 MONTH</b>	Approval Date	
Consulting Services Budget	<b>USD 6,000,000</b>	Estimated Short-listing Date	<b>24-Apr-2019</b>
Budget Type	<input checked="" type="radio"/> Estimated <input type="radio"/> Maximum	Estimated Commencement Date	<b>01-Sep-2019</b>
Open to non-Member Countries	<input type="radio"/> Yes <input checked="" type="radio"/> No		

**Additional Information**

Indefinite Delivery Contract (IDC)  Yes  No  
 Country of assignment **Tonga**

**Contact Information**

Project Officer: **Pamela Wyatt**  
 Designation: **Principal Public Management Specialist (Governance)**  
 Asian Development Bank  
 Email: **pw Wyatt@adb.org**

**Agencies**

Primary	Agency	Country	Agency Role	Contact Person	View Details
<input checked="" type="checkbox"/>	Ministry of Finance and National Planning	Tonga	Executing Agency		
<input type="checkbox"/>	Ministry of Health	Tonga	Implementing Agency		

**Publishing History**

Type	Publication Date	Published By	Duration of Advertisement	Deadline	View Remarks
Original	23-Mar-2019	Diane Mauritz P. Zapata	26 DAYS	17-Apr-2019	

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# Expression of Interest (1/3)

**Consulting Firm Information**

CMS Number  
 Consultant Name  
 Country of Incorporation \* Acronym

**Associations (Joint Venture or Subconsultancy)**

Add Consultant

CMS Number	Consultant	*Acronym	Country	Joint Venture	EOI Submission Authorized By	Position	Delete
No results found.							

I confirm that:

Documentation regarding our corporate structure including beneficial ownership has been attached into ADB's CMS

Documentation regarding our Board of Directors has been attached into ADB's CMS

ADB reserves the right to reject the proposal of an association if member(s) of the association is changed/dropped without valid reason after the association has been shortlisted. However, should valid reasons exist (e.g. associate partner was sanctioned by ADB or other MDBs, associate partner went out of business, etc.), satisfactory evidence in support of such reasons should be sent to ADB for consideration.

**Assignment Specific Qualifications and Experience**

TIP Your EOI should demonstrate the technical competence and geographical experience indicated in the project references. As preparation for filling out this EOI screen, ensure updated consultancy and project information has been entered in the Profile tab.

**A. Technical Competence**

TIP Cross-referencing the selected from your CMS profile projects, highlight the technical qualifications of your entity/ consortium in undertaking similar assignments.

\* Provide details of past experience working with similar project authorities.

**B. Geographical Experience**

TIP Cross-referencing the selected from your CMS profile projects, present experience in similar geographic areas.

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## Expression of Interest (2/3)

**C. Management Competence (Please answer each question in one paragraph of 3-5 sentences)**

\* 1. Describe standard policies, procedures and practices that your entity has to assure quality interaction with clients and outputs. Please state if your company is ISO certified.

\* 2. How will your firm/consortium handle complaints concerning the performance of experts or quality of the reports submitted for this assignment? What internal controls are in place to address and resolve complaints?

\* 3. How will you ensure the quality of your firm's/consortium's performance over the life of this assignment?

\* 4. Describe standard policies, procedures and practices that your firm has put in place to avoid changes/ replacements of personnel and to ensure the continuity of professional services once contracted.

\* 5. Describe what social protection practices you have in place to safeguard the well-being of your proposed experts? Specifically describe arrangements you have in place for medical, accident and life insurance coverage during the assignment.

**D. Other Information (maximum of 500 words)**

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## Expression of Interest (3/3)

**Project References**

✓ TIP Choose from the list of projects (based on what was entered in the Profile tab) to demonstrate the firm's technical qualifications and geographical experience for the advertised assignment.

Add Project

Period	Client	Project	Country	Firm	View Details	Delete
No project found.						

**Comments on Terms of Reference**

✓ TIP This may include, but not limited to comments on clarity of the assignment's inputs, outputs, outcome and impact.

**Comments on Budget Adequacy**

**Key considerations in approaching this assignment (no more than 9,000 characters summarizing approach and methodology)**

**Key Experts**

✓ TIP List of experts is only required for Consultants' Qualifications Selection (CQS).

Add Expert

Name	Email	Consultant Status	Full-Time Firm Expert	Affiliation Status	Firm	View Profile	Delete
No search conducted.							

**EOI Attachments**

Title	Type	Description	Category	Last Updated By	Last Updated	Update	Delete
No results found.							

**Eligibility Declaration**

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## ADB CMS Tutor –How to use CMS

- <http://consultanttutor.adb.org>
- Provides guides, FAQs and other advice on using the System.
- Step-by-step instructions to take you through each step of the process.
- Contact Details for CMS support

The screenshot shows the ADB Consultant Tutor website. At the top right is the ADB logo. Below it is the 'Consultant Tutor' header with a 'Log In' link. A navigation menu includes 'HOME', 'INDIVIDUALS', and 'FIRMS', along with a search bar. The main banner area is titled 'CONSULTING FIRM ACCESS' and contains three bullet points: 'Submit Expressions of Interest', 'Prepare and submit proposals online', and 'Negotiate contract details'. Below the banner, there are three columns of content: 'support' (with a headset icon and contact info), 'About CMS' (with a CMS icon and a list of services), and 'Training Materials' (with a document icon and links to manuals and videos).

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The logo consists of a white tree-like structure on a blue background. The trunk and branches are white, and the leaves are represented by various icons in orange, green, and blue. The icons include a computer monitor, a power line tower, a water drop, a leaf, a gear, a handshake, a document, and a person. The ADB logo is in the top right corner, and the 'BUSINESS OPPORTUNITIES' logo is in the bottom right corner.

## Advice on Winning a Consultant Contract

BUSINESS  
OPPORTUNITIES

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## Observe Typical Challenges Faced by Consultant



### Short-list

- Unknown to the Client
- Lack of information (Ads & EOI) to allow informed decision
- Not qualified
- Conflict of Interest
- Partner with firms from non-member countries

### Proposal

- Experts: freelance (availability, qualification, performance)
- Generic, lack of innovation, unrealistic
- Inconsistent FP vis-à-vis TP
- Mistakes: type (FTP, STP, BTP), financial information included in TP (not allowed in QCBS)

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## Collect Relevant Information



- Identify Sectors of Interest and where maximum potential for success is likely
- Know your competition
- Look at past similar projects
- Study CPS and COBP to identify future opportunities
- Review procurement plans (and project documents)
- Check ADB website for opportunities. Register for alerts\*



(\* Alerts for consulting opportunities are available only at <http://cms.adb.org>)

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## Build Your Brand

ADB



- Visit ADB Headquarters/Resident missions
  - Visit departments responsible for projects
  - Business Opportunities Fairs (HQ)
  - Business Opportunities Seminars (INRM)
- Visit government executing agencies in advance of tendering opportunities

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## Build up your Portfolio

ADB

- Look at Individual as well as Firm opportunities
- Target standalone as well as associate & JV opportunities.
- Try smaller /low risk assignments (loss leaders) to build understanding and profile.
- Target area of specific expertise; reach out to ADB staff/borrower in advance of RFP to develop understanding of needs.
- If engaged, ensure professionalism, responsiveness and value-add during engagement.
- Use links developed to build profile.



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## Understand the projects you wish to undertake




- Recognize the broader project objectives
- Establish the operating context and any constraints it presents
- Get to know the Executing Agency
- Obtain all available information on the services to be provided
- Field assessment
- Identify local partner(s), if required
- Estimate the local costs of doing business (e.g. local taxes for EA administered consulting services)

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## Prepare a Robust Proposal



- Follow the instructions in the RFP documents
- Associate or JV with other firms to meet requirements
- Understand the basis on which the proposal will be evaluated
- Study the Terms of Reference (TOR)/Employer's requirements
- Demonstrate understanding of objectives; detail your methodology
- Provide tailored submission; avoid generic templates
- Ensure staff have relevant experience
- Do not add conditions to your offer
- Where possible, utilize employees from your firm (not freelance consultants)



*Ask Questions; contact ADB if not receiving a response*

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## Avoid Common Mistakes



- Firm or associates/experts not from ADB member countries\*
- Proposal received late: lack of time allocated to enter a proposal into CMS
- Non-compliant proposal (e.g. number of person-months or inclusion of non-nationals for national expert positions)
- Failure to specifically respond to Client requirements
- Failure to disclose conflicts of interest, e.g. EA' employees in a proposal
- Exceeding budget where RFP indicated a Maximum Budget amount
- Inclusion of conditions in proposal

(\* ) 2017 Procurement Policy: Firms engaged on Borrower Administered Consultancy services may use team members from non-ADB member countries

## Study Evaluation Criteria in the Standard RFP



*Example:  
QCBS Full Technical Proposal  
on an Output-based ToR and  
Lump-sum contract*

Technical Evaluation Criteria ⓘ	
Evaluation Criteria	Maximum Weight
<b>Qualification</b>	<b>200</b>
Experience in similar projects	100
Experience in similar geographic areas	100
<b>Approach and Methodology</b>	<b>500</b>
Understanding of objectives	50
Quality of Methodology	280
Innovativeness/Comments on TOR	50
Work Program	50
Personnel Schedule	50
Counterpart Personnel & Facilities	10
Proposal Presentation	10
<b>Personnel (as listed in TOR)</b>	<b>300</b>
<b>International Consultants</b>	<b>300</b>
Team Leadership	50
International Specialist 1	150
International Specialist 2	50
<b>National Consultants</b>	<b>50</b>
National Specialist 1	50
<b>TOTAL</b>	<b>1000</b>

## Post Award – The Real Test



Focus on delivery of strong performance through:

- High Quality Team
- Building strong relationships with Client (ADB or Government)
- Achievement of deliverables within stated timeline



Performance Assessment -Consulting

- ADB conducts Performance Evaluation Reviews (PER) for each consulting assignment. A poor performance record can impact future opportunities.

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## Debriefing: Lessons Learned for Future Participation



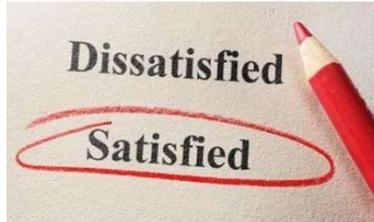

- Unsuccessful bidders may request a debriefing from Executing Agency (EA).
- Bidders can improve their participation in future tenders from feedback received during debriefing.
- Bidders may contact ADB if debriefing request is not fulfilled by the EA.

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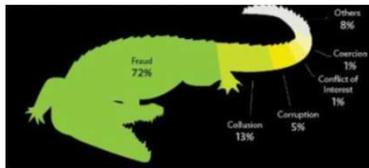
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## Complaints and Integrity Concerns

- **Complaints:**  
Bidders may file complaint with Executing Agencies (EAs) and copy ADB on [www.adb.org/forms/complaints](http://www.adb.org/forms/complaints) or file the complaint directly with ADB



- **Anticorruption and Integrity:**  
Bidders may also report integrity related issues with supporting information/documents to [www.adb.org/site/integrity/main](http://www.adb.org/site/integrity/main)