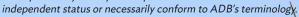
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INSIDE THE RFP:

A Consultant's Guide to ADB Procurement Process

Steven Gillard, **Head of Consulting Services** Unit, PPFD

> **Eduard Chil-Akopyan**, **Procurement** Specialist, PPFD





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Preparing High-Quality Proposals for ADB-Financed Projects





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A Consultant's Guide to ADB Procurement Process

Introduction to Consulting Services

Selection Methods

Expression of Interest (EOI) Preparation

EOIs Evaluation

Q&A and Discussions on EOIs

RFP Preparation

RFP Evaluation

Q&A and Discussions on TECH and FIN Proposals





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Introduction to Consulting Services



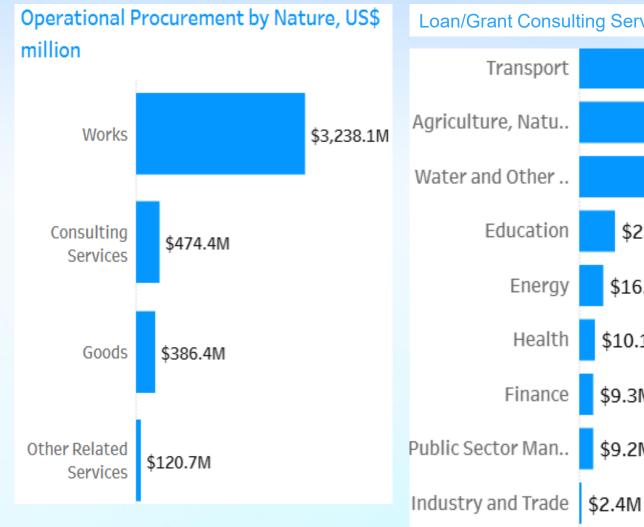


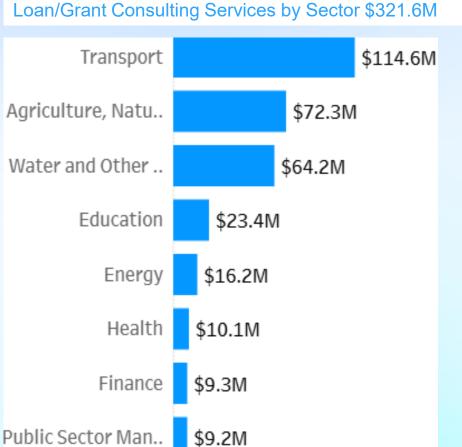
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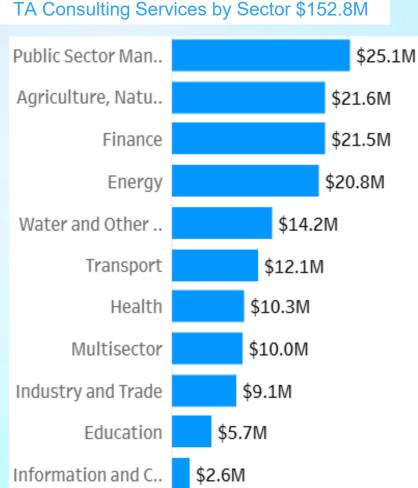
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ADB Consulting Services by Sectors 2025











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ADB or EA Administered – Key Differences

ADB Administered

- TA & Staff Consultancy
- ADB (generally) responsible for procurement
- ADB Negotiates & Contracts
- Responsibility to pay is ADB's
- * ADB RFP
- All procurement done on CMS
- Normally tax exempt
- Has Privileges and Immunities

EA Administered

- Loan and Grant Consultancy
- EA (generally) responsible for procurement
- **& EA Negotiates & Contracts**
- Responsibility to pay is EA's
- Harmonized RFP
- Mainly "hard copy" with parts on CMS
- Tax status depends on EA
- No Privileges and Immunities





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Typical Consultancy Opportunities

Project Preparation

Feasibility Studies,
Preliminary Design,
ADB Safeguard
Policies, Capacity
Building,
Procurement

Project Implementation

Detailed Design,
Construction
Supervision,
Project
Management,
Capacity Building,
Procurement

Knowledge Products

Studies, Capacity Building, Knowledge Sharing Staff Consultants

Administrative
Assistance to ADB
Operations



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ADB Procurement Framework - EA-administered consulting services

For projects approved on or after 1 July 2017

- * ADB Procurement Policy: Goods, Works, Non-consulting and Consulting Services to inform of the core principles that govern the procurement of goods, works, and non-consulting and consulting services required for the project.
- Procurement Regulations for ADB Borrowers: Goods, Works, Non-consulting and Consulting Services to inform of the regulations that govern the procurement of goods, works, and non-consulting and consulting services required for the project.
- Documents for Recruitment of Firms and Individual Consultants by Executing Agencies - User's Guide on the Selection of Consulting Services for Borrowers, and Standard Request For Proposal (SRFP)
- * Guidance Notes on Procurement used to operationalize ADB Procurement policy and Regulations, and grouped based on themes, including Consulting Services Administered by ADB Borrowers





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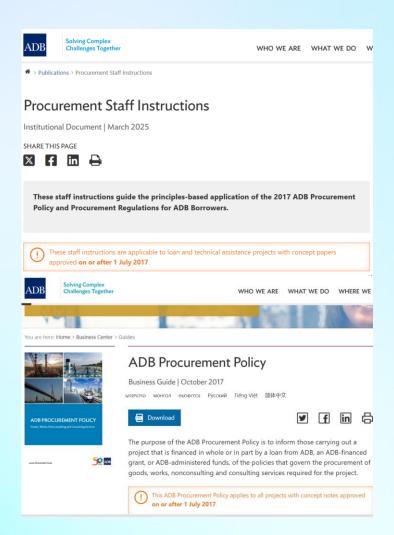


ADB Procurement Framework - ADB-administered consulting services

Emphasis on adherence to core procurement principles and compliance with the ADB Procurement Staff Instructions for ADB-administered procurement

ADB Procurement Policy: Goods, Works, Non-consulting and Consulting Services (for projects approved on or after 1 July 2017) - to inform those carrying out a project of the core principles that govern the procurement of goods, works, and non-consulting and consulting services required for that project.

Procurement Staff Instructions (SI) - cover procedures to be followed by staff in undertaking procurement of goods, works, and services under ADB-administered and Borrower administered projects based on the ADB Procurement Policy: Goods, Works, Non-consulting and Consulting Services (2017, as amended from time to time), and are applicable to loan and TA projects with concept papers approved after 1 July 2017.







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Selection Methods



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ADB Consulting Services Selection Methods Overview

Method	Full Name	Stage	Proposal Type	Evaluation Process	When to Use	Budget Threshold
QCBS	Quality and Cost-Based Selection	Two-stage	FTP or STP	Weighted scoring (e.g., 80:20, 70:30, 90:10)	Default method; when TOR is clear and inputs can be estimated	No fixed cap
QBS	Quality-Based Selection	Two-stage	FTP or STP	Qualitative ranking; only top firm's financial proposal opened	Complex/specialized assignments; high impact	No fixed cap
FBS	Fixed Budget Selection	Single-stage	STP	Technical scoring; proposals exceeding budget rejected	When budget is fixed and TOR is clear	Budget must be declared
LCS	Least-Cost Selection	Single-stage	STP	Minimum technical score (e.g., 750); lowest cost wins	Routine, small assignments (<\$100K)	<\$100K
cqs	Consultants' Qualifications Selection	Two-stage	ВТР	Best EOI selected; only top firm invited to submit proposal	Small assignments (<\$200K); boutique firms; few qualified firms	<\$200K
SCQS	Simplified CQS	Single-stage	ВТР	Technical scoring out of 1,000; fixed budget; top firm invited	Rapid mobilization; alternative to multiple ICs	≤\$500K (pilot stage)



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Pilot Method - Simplified Consultants' Qualifications Selection (SCQS)

ADB has launched a new, pilot selection method for recruiting consulting firms known as "simplified consultants' qualifications selection" (SCQS) and applied under ADB-administered consulting services.

Emphasis on rapid deployment!

It aims to reduce recruitment times by half or more. Time-saving features include:

- Single-stage, single-envelope proposal process
- Evaluation is based on highest technical score within maximum budget
- Financial evaluation follows cost competitive principles
- Documents necessary for negotiations and any desired changes to the standard contract are raised within the proposal itself

Opportunities are now being advertised on CMS using SCQS. Currently ADB administered only and for lower value contracts.





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Expression of Interest (EOI) Preparation





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Summary of ADB Recruitment Process – for Firms

1

Consulting
Services
Recruitment
Notice (CSRN) /
Advertisement

2

Expressions of Interest (EOI)

3

Shortlisting of Consultants

4

Preparation & Issuance of Request for Proposal (RFP)

Evaluation of Technical Proposals

Public opening of Financial Proposals

Evaluation of Financial Proposal & overall ranking

Contract
Negotiations and
signing of
contract

5

6

7

3



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Initial Steps for Being Successful in ADB-Financed Assignments

Collect	Collect relevant business intelligence – network!
Focus on Performance and reputation for success	
Build	Build brand name (consider SSS/ individual contracts)
Understand Understand the country, project, and client require	
Position	Position yourself to your competitive advantage
Partner	Partner with firms likely to be shortlisted
Have	Have a dedicated person monitoring CMS opportunities



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Conditions to Create Competitive High-Scored EOI

- Start Early
- * Invest in dedicated Proposal Preparation Team
- * Form a JV Partnership with Rationale with Clear Shared Experience
- Ensure Professional Local Partnership
- Use ADB templates
- Customize Everything
- Highlight only Relevant Experience
- Provide Certification
- * Introduce Methodology Outline
- Proofread and peer review
- * Follow submission instructions





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Conflict of Interest

- * Dual Role conflict A firm providing goods or services for a project cannot also offer consulting services for the same project.
- * Assignment Overlap A firm cannot be hired for multiple assignments that may conflict with each other, even across different clients.
- Undisclosed Interests Failure to disclose actual, potential, or perceived COI during bid submission or contract execution may lead to rejection.
- * Unfair Competitive Advantage Consultants or their Affiliates competing for a specific assignment do not obtain a competitive advantage from having provided consulting services related to the assignment in question. The Client must share in RFP any relevant information with all shortlisted firms to ensure a fair and transparent selection, and prevent any unfair competitive advantage over competing Consultants.





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Common mistakes at EOI stage

- Submits (too) late
- Missing to Identify each JV partner and/or sub-consultant entity in CMS
- Missing rationale and info on Each JV partner and/or sub-consultant included in All sections
- Missing country and regional experience of Firm or JV partner
- Lack of local presence in the project country
- Firm or associates not from ADB member countries
- Firm submitted a generic EOI lacking complete information
- ❖ Generic Management Competence No Certifications info

- Although qualitative evaluation of EOIs recommends showing strengths and weaknesses of the firm, many EAs still prefer quantitative evaluation, e.g., counting
- Missing Number of Relevant Projects (many small)
 from Each JV member
- Missing Clear Relevant Projects information:
- ✓ Project Title, Project Scope Summary
- √ Firm Implemented,
- ✓ Name of Client, Country
- ✓ USD value, % of Contract Implemented by Firm
- Missing Comments on TOR and on Budget
- Lack of summarizing approach and methodology



Measures to avoid mistakes at EOI stage

- Ensure profile in CMS is up to date
- Submit EOI in time
- Clearly Identify each JV partner and/or subconsultant entity in CMS
- Include Clear rationale and information on Each JV partner and/or sub-consultant in All sections
- Ensure country and regional experience of each JV partner
- Ensure presence in the project country
- Submit Tailored EOI
- Provide Management Competence for each JV partner
- Indicate ISO Certifications by each JV partner

- Provide Only Relevant Projects (avoid small projects) for each JV member
- Provide Clear Relevant Projects information:
- ✓ Project Title,
- ✓ Project Scope Summary
- ✓ Firm Implemented,
- ✓ Name of Client, Country
- ✓ USD value, % of Contract Implemented by Firm
- Provide Relevant Comments on TOR and on Budget Adequacy
- Provide summarized approach and methodology
- Ensure Professional EOI Presentation





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EOIs Evaluation





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Example of EOI Evaluation Criteria

Evaluation Criteria	Lead Firm with JV partner	Sole Entity
Evaluation Criteria	Max. Weight	Max. Weight
Management Competence	20.00	20.00
Quality Control and Assurance	5.00	6.67
Project Management Coordination	5.00	6.67
Approach and Methodology	5.00	6.67
Contribution of JV partner to management	5.00	0.00
Technical Competence	60.00	60.00
Firm's specialisation vis à vis the sectoral focus of the assignment	5.00	10.00
Firm's experience vis à vis the assignment's TOR	10.00	15.00
Number of similar projects undertaken where firm as lead partner	20.00	25.00
Number of similar projects undertaken where firm as JV partner	5.00	10.00
Technical rationale for JV or sub-consultant	5.00	0.00
JV partner's experience vis à vis the assignment's TOR	15.00	0.00
Geographic Competence	20.00	20.00
Firm's country experience	4.00	7.33
Firm's regional experience	4.00	7.33
Permanent presence / local office	2.00	5.33
JV partner's country experience	4.00	0.00
JV partner's regional experience	4.00	0.00
JV partner's or Sub-Consutant's permanent presence / local office	2.00	0.00
Total Score	100.00	100.00





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Q&A and Discussions on EOIs





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RFP Preparation





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Confidentiality

From the time the Proposals are opened to the time the Contract is awarded, the Consultant should not contact the Client on any matter related to its Technical and/or Financial Proposal.

Information relating to the evaluation of Proposals is not disclosed to the Consultants who submitted the Proposals or to any other party not officially concerned with the process, until the publication of the Contract award information.

Any attempt to improperly influence the Client in the evaluation of the Proposals or Contract award decisions may result in the rejection of that consultant's proposal. Also possible sanctions.

If a Consultant wishes to contact the Client or the Bank on any matter related to the selection process, it should do so only in writing.





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Different Types of Proposals

Type	Full Technical Proposal	Simplified Technical Proposal	Biodata Technical Proposal
Use/features	Complex TOR Maximum detail Output based	Well-defined TOR – no emphasis on org and exp Output/Input based	Simple input based TOR - no emphasis on org and exp or method Input based
Firm Qualification and experience	100-200 generally	n/a	n/a
Approach and methodology	200-400 generally	300 generally	100 (workplan only) generally
Personnel	500-700 generally	700 generally	900 generally





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Different Types of Proposals

	EVALUATION CRITERIA	Max. Weight	
I. Qualifica	100		
a.	Experience in similar projects	50	
b.	Experience in similar geographic areas	50	
II. Approac	II. Approach and Methodology		
a.	Understanding of Objectives	40	
b.	Quality of Methodology	30	
C.	Innovativeness/Comments on TOR	30	
d.	Work Program	30	
e.	Personnel Schedule	30	
f.	Counterpart Personnel & Facilities	30	
g.	Proposal Presentation	10	
III. Person	nel (Areas of Expertise)	700	
Key Expe	rts (International)	500	
a.	Team Leadership *	150	
b.	Expert 1	150	
C.	Expert 2	100	
d.	Expert 3	100	
Key Experts (National)		200	
a.	Expert 1/Deputy Team Leader	80	
b.	Expert 2	60	
C.	Expert 3	60	
	TOTAL	1000	

	EVALUATION CRITERIA	Max. Weight
I. Qualificat	200	
a.	Experience in similar projects	100
b.	Experience in similar geographic areas	100
II. Approac	h and Methodology	300
a.	Understanding of Objectives	50
b.	Quality of Methodology	50
C.	Innovativeness/Comments on TOR	40
d.	Work Program	40
e.	Personnel Schedule	40
f.	Counterpart Personnel & Facilities	40
g.	Proposal Presentation	40
III. Personn	el (Areas of Expertise)	500
Key Expert	s (International)	200
a.	Team Leadership *	50
b.	Expert 1	50
C.	Expert 2	50
d.	Expert 3	50
Key Experts (National)		300
a.	Expert 1/Deputy Team Leader	100
b.	Expert 2	100
C.	Expert 3	100
	TOTAL	1000





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I. Qualification and Experience 100 - 200 (FTP)

- ❖ Experience in similar projects (As per EOI) clearly set out the number of Relevant Projects with Similar Scope, Duration, Location and Amount
- Experience in similar geographic areas Include Relevant Similar Regional Experience (Central Asian, Southeast Asia, East Asia) under Similar or Other Type of Projects
- Local experience can be supplemented through local JV members or subcontractors
 - ✓ Local experts bring local experience& cultural/ legal understanding
 - ✓ Also encourages development of local capacity
 - ✓ Sometimes mandated or supported by local regulations





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II. Approach & Methodology 200 - 400 (FTP) - Part 1

Understanding of Objectives

- Has the firm done a site visit, if permitted? (not mandatory, but preferred)
- Understand client requirements (ADB, government) –
 engage with TOR and show how your knowledge adds value
- Does the proposal respond to all the TOR objectives or does it fail to address some requirements?
- Analysis of issues and constraints

Work Plan

- Sets out deliverables and how they will be achieved in detail (particularly if output based)
- Clear description of all important activities
- Timing of activities appropriate & sequence is logical

Quality of Methodology

- Consistency between Work Plan and methodology
- Addresses the requirements of the TOR Comprehensive / Clear / Accurate / Practical / Logical / Innovative
- Demonstrates up-to-date knowledge and understanding of TOR
- Provide comments on the TOR (particularly if output based) but these must be constructive!

Personnel Schedule

- Consistency with Work Plan and Related to deliverables
- Appropriate timing and allocation of input
- Home inputs not excessive field inputs tend to be important
- Overall strength of the team including non-key experts evaluated here on output-based



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II. Approach & Methodology 200 - 400 (FTP)) - Part 2

Innovativeness/Comments on TOR

- Provide innovative approaches
- Provide necessary comments on TOR
- Cover all sections of the TOR scope, team composition, deliverables, etc.

Counterpart Personnel & Facilities

- Provide necessary comments on the Counterpart Personnel
- Provide necessary comments on the Reports, Equipment and Facilities to be provided by the Client
- Present the gaps identified

Proposal Presentation

- This is an essential requirement that, over time, continues to warrant increased focus
- Structure your proposal as per RFP, clearly separate different sections





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Common Mistakes in Approach and Methodology

Poorly written, "copy and paste" proposals – remember

- not all evaluators are native speakers,
- some may not be technical specialists in the field.
- first impressions count the first few pages are key,
- be concise, and write clearly and well

Study the Terms of Reference (TOR) - don't just repeat back!

Lack of tailored approach – could it be applied to any project in the same sector?

Poor understanding of expected personnel inputs, leading to disproportionate distribution of home vs field inputs

Workplan does not comply with any prescribed criteria such as inputs of key experts on an input-based contract



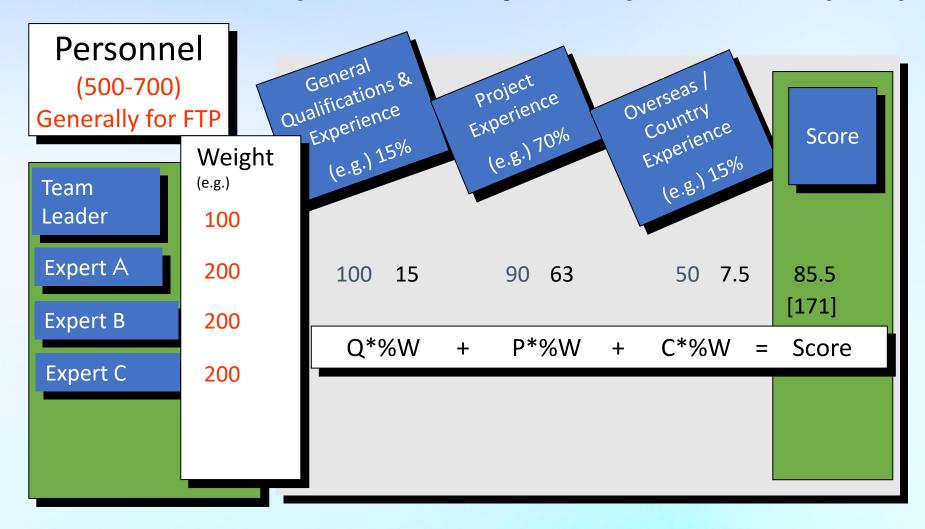


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III. Personnel (Areas of Expertise) 500 - 700 (FTP)







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Common Mistakes in Personnel Presentation and CVs

Poor Formatted CV,

- Not clear education record,
- No training or certifications listed,,
- No countries of work experience reflected,
- No regional experience and country specific experience evidenced

Submit CVs filled in accordance with the standard format in RFP, and adhere to the designated CV structure

Provide year-by-year employment record demonstrating the required specific expertise

Highlight targeted expertise to strengthen visibility

List number of assignments that best illustrate the expert's capability to handle the tasks outlined in the expert's TOR or Job Description





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Other mistakes in proposals which may lead to failure

Mistakes

- Doesn't conform to required templates (EA administered)
- **❖Not properly Signed Proposals (EA** administered)
- Insufficient time afforded to entry of proposal in CMS: late proposals not accepted
- Disclosing Financial Information in **Technical Proposal**

More tips

- **❖**Note key dates
- *****Be ready for possible bid extensions or amendments
- **Look for your Competitive Advantage,** and Remember
 - **✓** ADB projects generally receive large responses
 - ✓ The competition is strong
 - √ The most important quality is generally excellence





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RFP Evaluation

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Preparation of Competitive High-Scored Technical Proposal

- Start Early
- Invest in dedicated Proposal PreparationTeam
- Ensure Professional Local Partner Support in Proposal Preparation
- * Customize Everything, Don't Copy-Paste TOR
- * Highlight only Relevant Experience
- Introduce Innovation in Approach and Methodology
- Select a qualified experts who meets the required qualification tune CVs
- Proofread and peer review





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Final Success Step Competitive Financial Proposal

- * Align Budget under Ceiling Avoid exceeding the maximum budget.
- Break Down Costs Clearly Competitive Remuneration of Experts, Out-of-pocket Expenses Non-Competitive Provisional Sum and Contingency
- * Ensure Consistency Across Documents The financial proposal must match the technical proposal in scope and staffing (FIN and TECH Forms). Discrepancies may raise compliance issues.
- * Countercheck for multiplication errors and harmonize figures Verify for calculation errors and ensure consistency across all FIN forms FIN Forms







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Example of Technical Proposal Evaluation – Part 1

I. Qualification

Strengths:

A. Experience in Similar Projects

The consultant has vast relevant experience in implementation of the same or similar projects. Presented around 49 relevant projects (including 23 projects from JV member XXX) with a similar scope covering construction supervision, design review, and safeguards support including 6 projects with IFIs.

Therefore, the Consultant received a score of 100 points out of 100 for this qualification requirement.

B. Experience in Similar Geographical Areas

The Consultant has strong experience of the project's implementation in the Similar Geographical Areas, particularly presented 9 relevant projects in Central Asia, including Tajikistan, Uzbekistan, and Kazakhstan.

Based on the above the Consultant received a score of 48 points out of 50 for this qualification requirement.

No major weaknesses identified





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Example of Technical Proposal Evaluation – Part 2

II. Approach and Methodology

Strengths:

A. Understanding of Objectives

The consultant has a clear understanding of the project requirements, demonstrated up-to-date knowledge and understanding of the project objectives. Therefore, the Consultant received the score of 45 points out of 50 for this requirement.

B. Quality of Methodology

The methodology is professional, cover all implementation aspects, including key success factors, management, safeguards, supervision, quality, assumptions, risks and mitigation measures. Consultant received 48 points out of 50 for this requirement.

C. Innovativeness/Comments on TOR

Comments on TOR are very well elaborated and presented in detail, covering all phases of the project implementation, and have some innovativeness regarding the proposal for the tailored training for the EA. Thus, the Consultant received 10 points out of 10.

D. Work Program

WP is very well presented with all activities (bar chart) and deliverables. The time schedule of deliverables meets the requirements of TOR (62 months including one month for preparation and one month for finalization). Consultant received 48 points out of 50.

E. Personnel Schedule

PS clearly shows relationships between the required person-months, the proposed work program, and deliverables. The deliverables are based on implementation activities and reflect the real contribution of the staff to the work program. All international key expert's inputs are allocated under the field inputs. Consultant received 40 points out of 40 for this requirement as well.

F. Counterpart Personnel and Facilities

The Comments on Counterpart Personnel & Facilities are well elaborated and show an understanding of the facilities to be provided by the client and the process of involvement of counterpart staff. Thus, the Consultant received the score of 10 points out of 10.

G. Proposal Presentation

The proposal is developed professionally, with clarity and ease of assessment of the required information and has a good readability format. The adherence to the page limits is followed as specified in the RFP Consultant received 40 points out of 40 for this requirement.

No major weaknesses identified.





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Example of Technical Proposal Evaluation – Part 3

III. Personnel - International Consultants

Strengths

Consultant has strong and experienced international team Consultant has strong and experienced national team composition with higher education, extensive general and specific composition with higher education, extensive general and experience, overseas experience and other qualifications as specific experience, overseas experience and other required by TOR. Therefore, 10 experts out of 11 received high qualifications as required by TOR. Therefore, all 13 experts scores and ratings from Above Average to Very Good.

Weaknesses:

One expert – XXXX, received overall rating of 65%, because the No major weaknesses identified lack of specific experience as an energy engineer in road projects Consultant's national team received the combined score of and projects with IFI (60% rating), and lack of Overseas/Country 210 points out of maximum 240. experience (60% rating), as he has only one project outside XXX in XXX.

Consultant's international team received a combined score of 320 points out of maximum 360.

III. Personnel - National Consultants

Strengths

out of 13 received high scores and ratings from Above Average to Very Good.





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Q&A and Discussions on TECH and FIN Proposals





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Other mistakes in proposals which lead to failure

Mistakes

- Doesn't conform to required templates (EA administered)
- Insufficient time
 afforded to entry of
 proposal in CMS: late
 proposals not accepted
- Disclosing Financial Information in technical proposal



More tips

- Note key dates
- Be ready for possible bid extensions or amendments
- Look for your competitive advantage: remember
- ADB projects generally receive large responses
- The competition is strong
- The most important quality is generally excellence





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Debriefing and Complaints

Debriefing:

- Unsuccessful bidders may request debriefing from the procuring entity (the EA or ADB). If they are not satisfied with the explanation given, they may submit a complaint.
- Debriefings are an excellent learning opportunity for future bids!

Complaints:

- •Bidders may file complaint directly with ADB and may copy ADB on correspondence with EAs.
- Complaints to ADB should be submitted through online form: https://www.adb.org/forms/complaints

How to report fraud:

www.adb.org/site/integrity/how-to-report-fraud





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Useful References

For Projects with Concept Notes approved on or after 1 July 2017



Procurement Staff Instructions



ADB Procurement Policy & Regulations

For Projects with Concept Notes approved before 1 July 2017



Project Administration Instructions



<u>Guidelines on the Use of Consultants by Asian</u> <u>Development Bank and its Borrowers</u> For Projects with Concept Notes approved on or after 1 July 2017



Standard Request for Proposal (RFP)

Contract Management



Manual on Contract Management



Guidance Note on Contract Management



<u>Memo on Improving Practices for Recruitment and</u> <u>Management of ADB-Administered Consultants</u>





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Thank You!

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