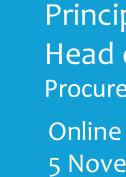


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Consultancy Recruitment – CSO Perspective



Steven Gillard
Principal Procurement Specialist
Head of Consulting Services Unit
Procurement, Portfolio and Financial Management Department

Online Session
5 November 2025





Format



- 1 Introduction and Key Statistics
- 2 Selection Methods
- Consulting Management System (CMS)
- Finding Information and Opportunities
- Bidding Expressions of Interest,
 Proposals and How they are Evaluated
- 6 Q&A



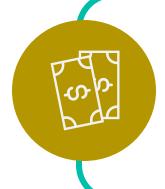
Introduction and Key Statistics





Funding
Source
Relevant to
Consulting –
Main
Differences

Loan/ Grant



Selected by

Contracted by

Systems

Complaints/Disputes

EA (ADB reviews) (delegation?)

EΑ

Mainly Offline – SRFP

EΑ



Technical
Assistance/
Staff
Consultancy



Selected by

Contracted by

Systems

Complaints/Disputes

ADB (delegation?)

ADB

CMS

ADB



Firm or Individual Consultant?





Firm Consultants

Private Sector

CSO/NGO

Universities

International Organizations



Individual Consultants

Private Individual Individual through firm*

*Tip – Firms can target individuals consulting contracts to gain experience.



2024
Consultant
Recruitment,
by consultant
type, product
type –by
value



Individual Consultants

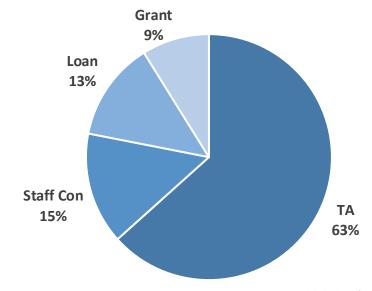


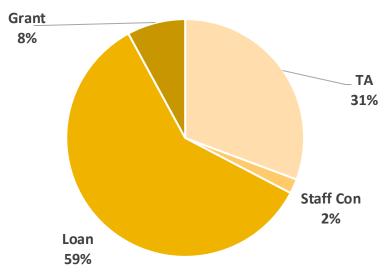
Total Value (\$)	Count
106,370,355	2,754
24,729,374	738
21,933,361	406
14,878,614	252
167,911,704	4,150
	106,370,355 24,729,374 21,933,361 14,878,614





Type	Total Value (\$)	Count
Technical Assistance	100,899,469	269
Staff Consulting	6,516,785	38
Loan	195,286,064	163
Grant	26,091,245	62
Total	328,793,563	532





ADB Business Opportunities Seminar



Statistics for CSOs



- ADB currently has around 6,222 CSOs registered on its Consultant Management System (CMS)
- In 2024, 58 firms contracts and 55 individuals contracts awarded to CSOs
- Combined value of \$18.39M
- Almost half of the firms contracts awarded to CSOs were Direct Awards
- CSOs were also subcontracted by other entities on 20 occasions



Reminder to CSOs



CSO: You are a Consultant to ADB!



ADB not a donor to be "pitched" to



CSOs not expected to co-finance projects



CSOs compete against the private sector



CSOs can compete on price



Selection Methods





Competitive Procurement





ADB prefers Open Competitive Bidding – with publication of a procurement notice



But Limited Competitive Bidding (LCB) (no publication of notice) may be allowed in certain circumstances, whereby competitive procurement is undertaken only with certain selected consultants



Or Direct Contracting (single source)



Selection Methods for Firms

BUSINESS OPPORTUNITIES

when cost IS evaluated*

Quality-and Cost-Based Selection

Evaluated on **quality** of proposal and **cost** bid.

Best **combination** quality:cost based on pre-determined quality cost rate (i.e. 90:10; 80:20; 70:30; 50:50).

Fixed Budget Selection

Budget published.
Technical evaluation. Firm with highest technical score whose financial proposal is within budget wins.

Least-Cost Selection

Firms evaluated for technical qualification. **Technically qualified firm** with the **lowest cost** wins.

*because cost is evaluated, normally no cost negotiations



Selection Methods for Firms



when cost is NOT evaluated*

Quality-Based Selection

Evaluated based on the **quality** of the technical proposals. Financial proposal of the firm with highest technical score is then negotiated.

Consultants'
Qualifications
Selection

Evaluated based on consulting firms' qualifications, reflected in amplified **expressions of interest** submitted by firms in response to the advertisement (CSRN). Proposal then submitted.

Direct contracting

Non-competitive selection. Unique qualifications/ prior involvement/ low value. The firm is required to submit combined technical and financial proposal. (Also referred to as SSS)

^{*}Because cost is not evaluated, normally cost negotiations



New (pilot) selection method for firms



Pilot selection method for recruiting consulting firms known as "simplified consultants' qualifications selection" (SCQS)

Emphasis on rapid deployment!

Time-saving features include:

- Single-stage, single-envelope proposal process
- Evaluation based on highest technical score within maximum budget
- Financial evaluation follows cost competitive principles
- Desired changes to the standard contract are raised within the proposal itself

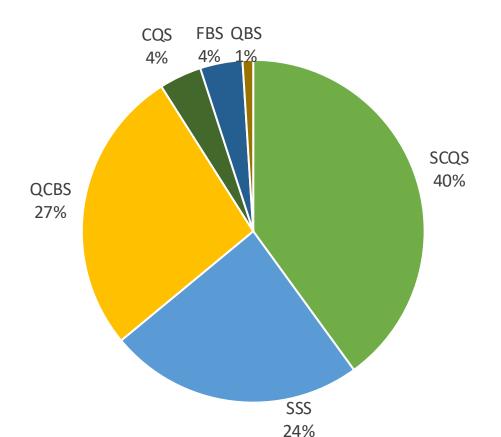
Currently ADB administered only and for lower value contracts



2024 ADB -Administered Firm Consultant Recruitment

BUSINESS **OPPORTUNITIES**

TA-Funded Firm Contracts by Selection Method



Selection Method	Count	Total Value USD	Average Value USD
SCQS	108	26,860,392	248,707
SSS	64	15,879,211	687,536
QCBS	73	50,190,117	248,113
CQS	11	1,684,579	153,144
FBS	10	4,759,700	475,970
QBS	3	1,525,470	508,490
Total	269	100,899,469	386,993

SCQS = simplified Consultants' Qualifications Selection

QCBS = quality- and cost-based selection

QBS = quality-based selection

CQS = consultants' qualifications selection

FBS = fixed budget selection

SSS = single source selection

LCS = least-cost selection



Competitively Selecting Individual Consultants*

Advertisement

Terms of Reference Budget EOI evaluation criteria

Shortlisting

Review of CVs and EOIs Interviews (optional)

Negotiations

Agreement on
Remuneration and Outof-pocket expenses
Signing contract



*Note that direct awards may be made for most contracts <67days





Cost Control (firm and individual consultant)



ADB needs evidence that the fee rates for experts are market rate. Either:

- Through competitive procurement which "tests" cost, or
- Through "substantiation", or
- Using our fee rates matrix

Substantiation is proof of having previously billed a rate. (Pay slip for Full Term employee; for Independent (freelancer), copy of recent contract).

- Substantiation not required during contract negotiations for QCBS, FBS, and LCS (cost is tested in evaluation) and small assignment lumpsum contracts
- Substantiation is required for QBS, SSS and CQS (except for small assignment lumpsum contracts).

If rates aren't substantiated, the ADB remuneration matrix will be used taking into consideration job level, experience, level of role

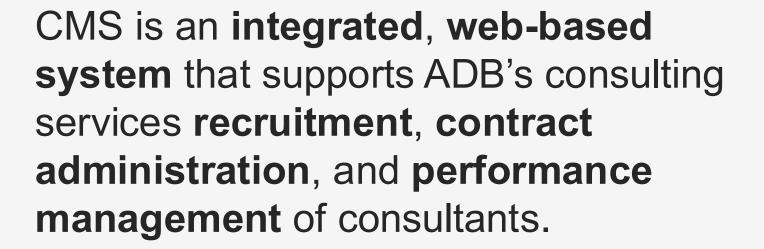


Consulting Management System (CMS)





Consulting
Management
System (CMS)



NB - "Soon" to be replaced...

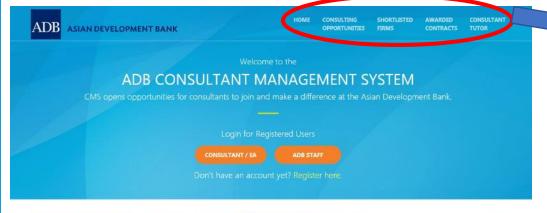




http://cms.adb.org

Finding Opportunities







Search Consulting Opportunities

Get detailed information on consulting services requirements and send expression of interests (EOIs) for ADB-financed or administered projects.



View Shortlisted Firms

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.



View Awarded Contracts

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. CONSULTING SHORTLISTED AWARDED CONSULTANT OPPORTUNITIES FIRMS CONTRACTS TUTOR

Consulting opportunities are visible through ADB's CMS (http://cms.adb.org)

Register for alerts to receive notices of all consulting opportunities

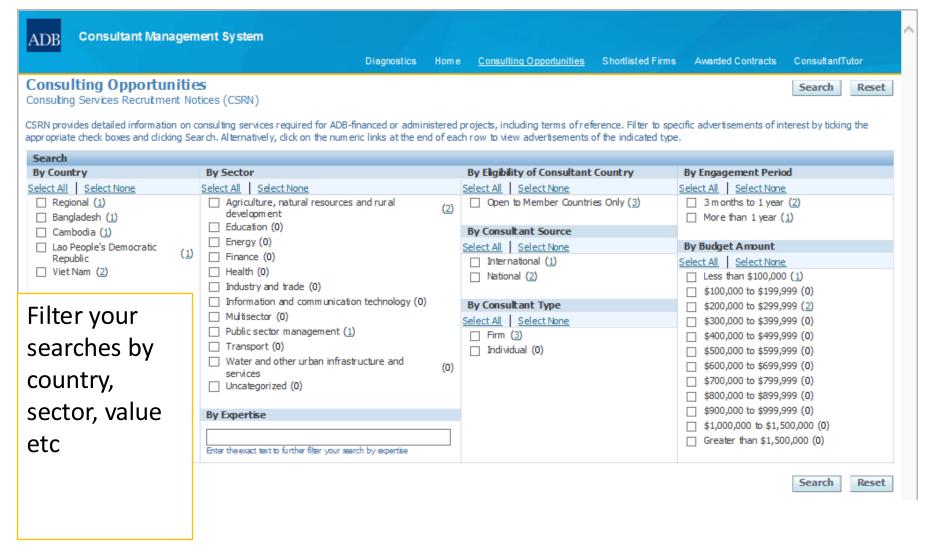
All advertisement of Consulting opportunities (both EA and ADB) published

RFP process for ADB Administered Contracts is through CMS



Consulting Opportunities

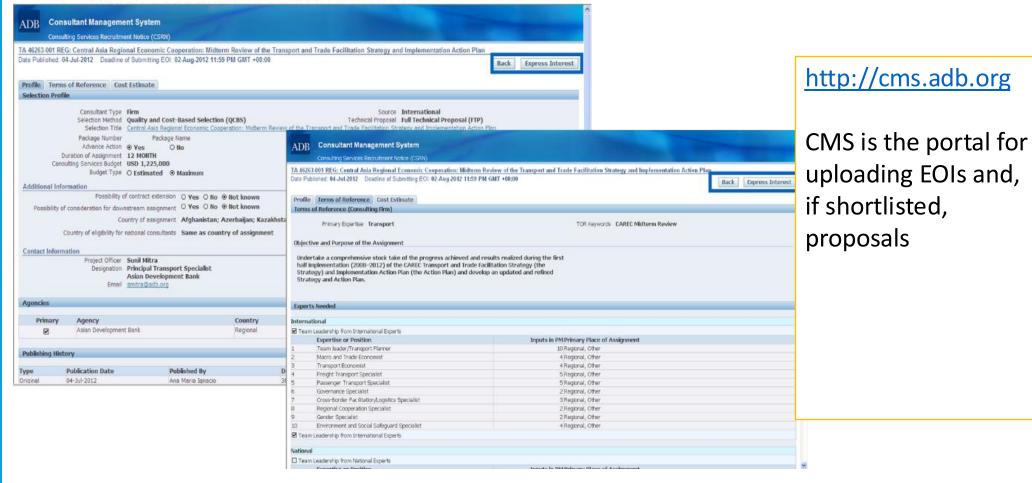






Express Interest







Register for alerts



ADB Consultant Management System

CSRN Weekly

Consulting Opportunities for the Week of 12 March 2018

The Consulting Services Recruitment Notice (CSRN) provides detailed information on the consulting services required for ADB financed or administered projects. Go to http://csrn.adb.org to see the complete list of advertisements.

You may also click on the Project name below for detailed information on the advertisement and to send your expression of interest for the assignment.

AGRICULTURE, NATURAL RESOURCES AND RURAL DEVELOPMENT

Project	Package Name	Consultant Type	Consultant Source	Published Date	Deadline for EOI
G RANT-0433 VIE: Greater Mekong Subregion Biodiversity Conservation Corridors Project (Additional Financing) (40253-035)	CPMU Accounting Assistant	Individual	National	06-Mar- 2018	15-Mar- 2018
G RANT-0433 VIE: Greater Mekong Subregion Biodiversity Conservation Corridors Project (Additional Financing) (40253-035)	Assistant Accountant	Individual	National	08-Mar- 2018	17-Mar- 2018
G RANT-0126 AFG: Agriculture Market Infrastructure Project (formerly Commercial Agriculture Development Project) (39370-022)	MAIL/ADB/AMIP/ISWME1 International Slaughterhouse Waste Management Expert	Individual	International	12-Mar- 2018	18-Mar- 2018
L OAN-8331 CAM: Tonle Sap Poverty Reduction and Smallholder Development Project - Additional Financing (41435-054)	017-018 Provincial Livelihood Advisors	Individual	National	12-Mar- 2018	19-Mar- 2018
G RANT-9183 MON: Integrated Livelihoods Improvement and Sustainable Tourism in Khuvsgul Lake National Park Project (48216-001)	C024 Micro-finance specialist	Individual	National	08-Mar- 2018	19-Mar- 2018
L OAN-8331 CAM: Tonle Sap Poverty Reduction and Smallholder Development Project - Additional Financing (41435-054)	010-016 Local Government Finance/Procurement Advisor	Individual	National	12-Mar- 2018	19-Mar- 2018

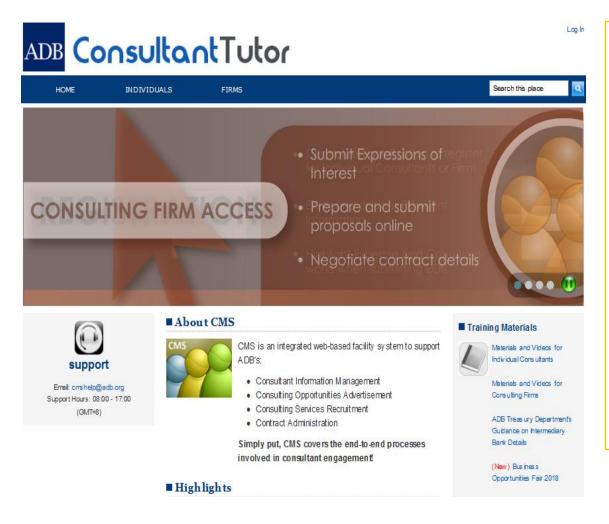
Weekly bulletin

All opportunities!



ADB CMS Tutor - How to use CMS





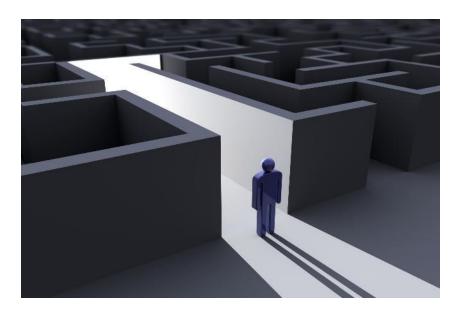
http://consultanttutor.adb.org

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





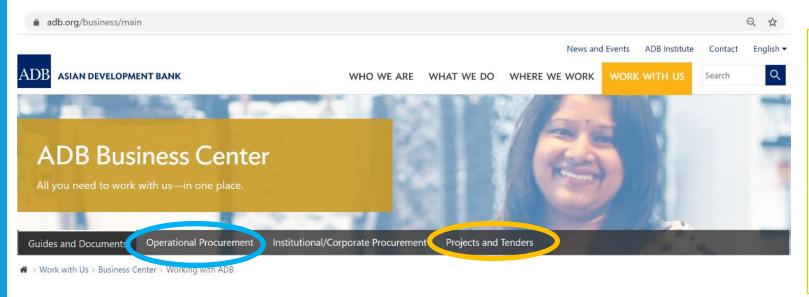


Finding Info and Opportunities





ADB Business Center – www.adb.org/business



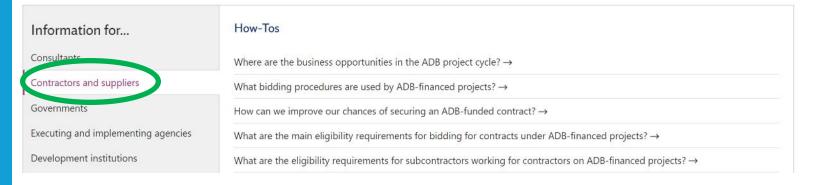
"How-To"s

Policies & Regulations

Procedures & Guidance

Documents & Forms

Working with ADB







Identifying Opportunities





Country Partnership Strategy
Procurement Plans





Request for Expressions of Interest

"Hop-on" Opportunities

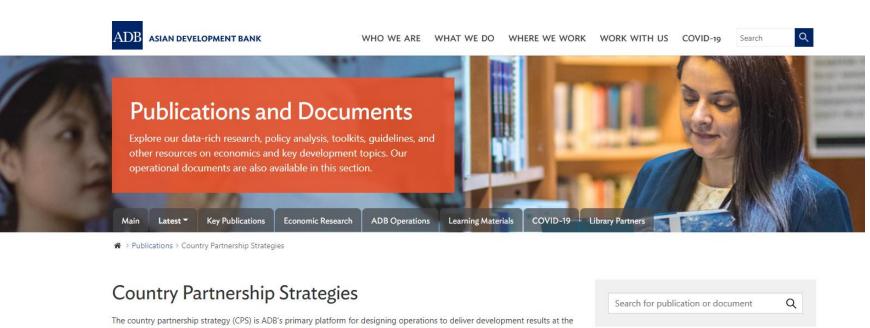
Shortlisted Consultants
Contracts Awarded

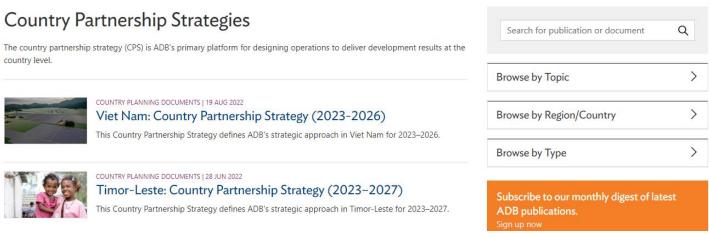


Country Partnerships Strategy



Country Partnership Strategies

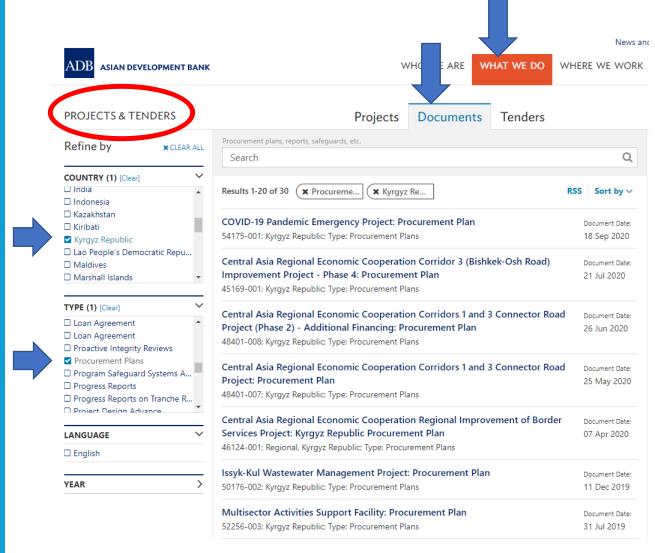






The Procurement Plan





Lists all foreseen procurement on a project.

Published once the project is approved

Updated periodically

Goods, Works and Services

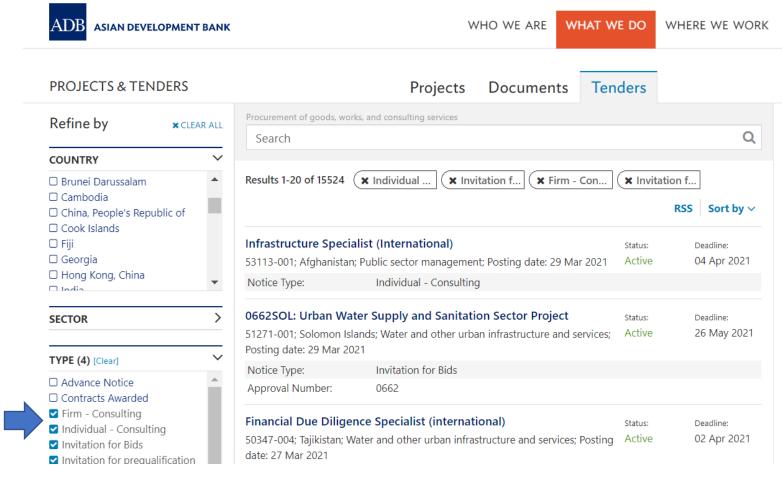
Includes salient points regarding tenders



Specific Procurement Notices







News and

ADB Business Opportunities Seminar



"Hop-on" Opportunities: Shortlisted Consultants

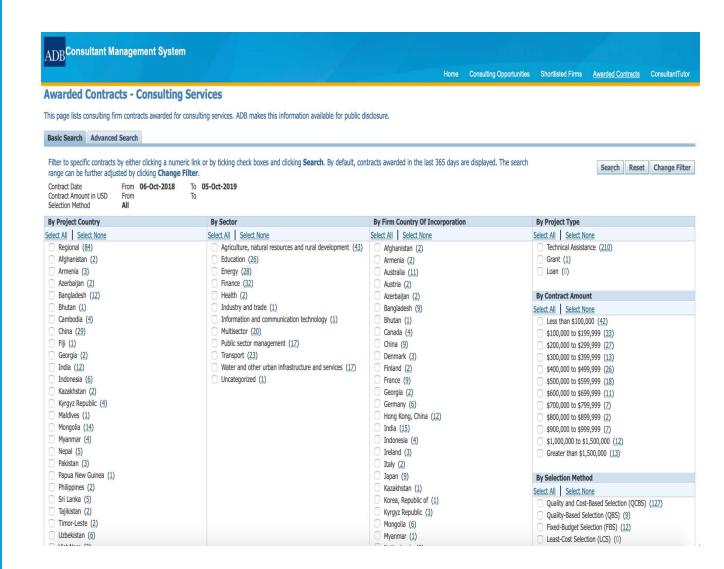






"Hop-on" Opportunities: Contracts Awarded





http://cms.adb.org

Identify Awarded
Contracts by country,
sector, value and
selection method.

Investigate possibility to partner on future engagements



Primer



Must Read!!!

https://www.adb.org/sites/default/files/identifying-business-ngos.pdf

Working with ADB: A Primer for Identifying Business Opportunities for NGOs







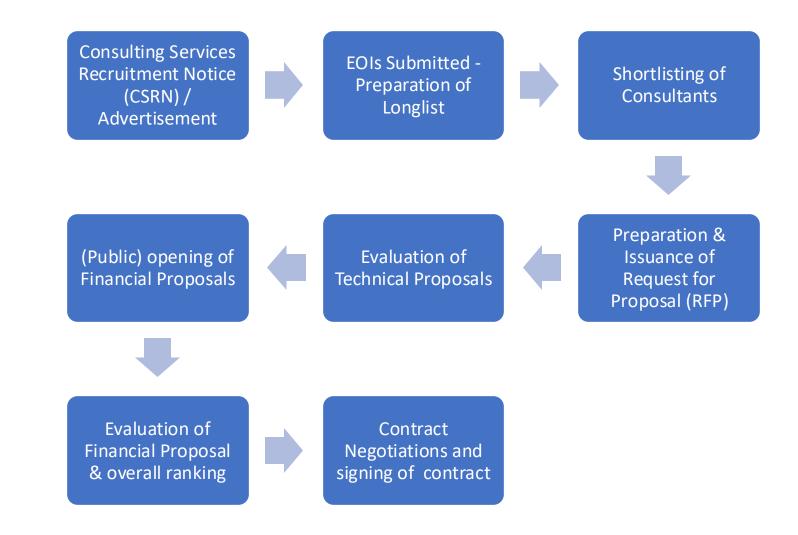
Bidding - Expressions of Interest





Summary of ADB Recruitment Process – for Firms





ADB Business Opportunities Seminar



Main Differences EOI vs Proposal (typically)



	EOI*	Proposal*
Legally binding	No	Yes
Structure	Greater freedom in structure	Heavily templated
Emphasis	Emphasis on firm experience	Emphasis on CV & methodology
Subject to Government concurrence	Yes	No
Deadlines	May be flexible	Rigid
Right to Feedback	No	Yes
Formal Clarifications	No	Yes

^{*}Both contain TOR and are evaluated according to criteria



Procurement Notice/ Inviting Expression of Interests



Consultant Services Recruitment Notice/ Request for Expressions of Interest



Contents include:

- Consultant Type (Firm or Individual)
- Selection Method (e.g. QCBS)
- Type of Proposal (e.g. FTP)
- Budget Type (Maximum or Estimated)
- Budget Amount
- Engagement Period
- Terms of Reference
- Deadline



Common Reasons for Failure to be Longlisted or Shortlisted



- Missing opportunities by not registering (NB EA administered also)
- Submits (too) late
- Firm submits Generic EOI
- Firm or associates not from ADB member countries
- Unclear/missing info
- Lack of local presence in the project country





Precise Language





Definitely Maybe

- "Must"
- "Shall"
- "a minimum of..."
- "Should"
- "Preferably/preferred"
- "Ideally"
- "May/ may be an advantage"
- "Would be desirable"



Bidding Proposals and How they are Evaluated (common mistakes and tips)





Request For Proposal (RFP)



Section 1

Letter of Invitation Section 2

Instructions to Consultants and Data Sheet

Section 3

Standard Forms for Technical Proposals

Section 4

Standard Forms for Financial Proposal

Section 5

Eligible Countries

Section 6

Banks' Policy –
Corrupt and
Fraudulent
Practice

Section 7

Terms of Reference

Section 8

Standard Forms of Contract



Letter of Invitation (LOI)

- Lists shortlisted firms and JVs (see who your competitors are!).
- Reminder that bids are not transferable.
- May not drop a JV partner.
- Generally permissible to add sub-consultants.





Data Sheet – Contents



- Selection Method
- Type of Proposal
- Budget for consulting services (Estimated or Maximum)
- Provisional sums (breakdown should be included)
- Contingency (about 5%-10% of budget)
- Key dates
 - Validity period for proposals
 - Submission time and date
 - Expected date to start contract negotiations/commencement

- Pre-proposal conference?
- Minimum total person-months input of international Key Experts and national Key Experts (it does not cover nonkey experts)
- Evaluation Criteria
- Clarifications



Clarifications





- You may request clarification in writing.
- Response will be given to ALL shortlisted firms in writing.



- Time extensions may be granted at ADB discretion if necessary.
- Note deadlines for requests.



Approach, Methodology & Workplan - Tips



- If offered, do a site visit
- Engage with TOR and address all requirements. Don't repeat TOR back.
- Comment on TOR (within reason!).
- Don't "copy and paste" prior proposal
- Demonstrate understanding of local context in proposal
- Write clearly and engagingly not all evaluators are native speakers, some may not be technical specialists in the field, first impressions count - the first few pages are key



Approach, Methodology & Workplan - Tips



- Ensure <u>consistency</u> e.g. between work plan and personnel schedule
- Clearly explain how you will achieve deliverables be innovative and clear
- Ensure sufficient <u>field inputs</u>
- Comply with any <u>prescribed criteria</u> such as minimum inputs of key experts on an input based contract



Personnel evaluation tips

- Select the best personnel, think particularly about
 - Team leader (interface) and
 - Local experts (development)
- Key experts who are rated zero or disqualified may prove fatal to an entire bid





Personnel evaluation tips

- Don't simply insert the CV the expert sends you work with the expert to emphasize (truthfully!) his/her relevant experience as per the TOR
- Provide a summary:
 - Total Years Experience in similar projects
 - Total Years Experience in similar geographic Area





Evaluating Financial Proposals



Financial Proposals checklist

No conditions or restrictions

Total price within budget (if maximum)

Consistency with technical proposals

- Experts inputs
- Number of trips
- Number of days of per diem
- NO FINANCIALS in technical proposal



Negotiations – common issues



- Consultant didn't budget properly (e.g. insufficient flights).
- Contract terms (limitation of liability, IP ownership, etc.)
- ADB adjusting inputs/TOR.
- ADB requiring expert replacement, or...







Negotiations – Substitution



Key experts substituted during negotiations or later, during contract

- Done deliberately or due to circumstances?
- May be acceptable after the original validity period expires

Commercial realities

- Consultant firms may not be able to keep experts waiting – experts have to apply for multiple roles
- EA may not want to find new consultant due to delays or disruption





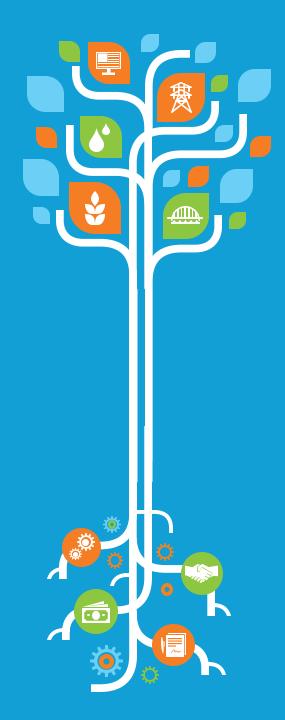
Tips for winning ADB-financed assignments







ADB Business Opportunities Seminar





THANK YOU!

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Procurement Division
sgillard@adb.org

