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# Preface

In April 2006, the Asian Development Bank (ADB) issued a revised edition of its *Guidelines on the Use of Consultants by Asian Development Bank and Its Borrowers*, (the *Guidelines*), incorporating significant changes resulting from the harmonization of policies and procedures with those of the World Bank.

While the *Guidelines* set basic policies and procedures, further guidance on using consultants is provided to ADB staff through the project administration instructions (which are updated periodically). A third reference, which provides information on practices and procedures in even greater detail and to a wider audience, has been the *Handbook for Users of Consulting Services* (the *Handbook*). The last edition of the *Handbook* was produced in 2002. Thus, when the new *Guidelines* were issued, a substantial amount of updating was needed, both because of the changes to the *Guidelines* themselves and because of incremental changes in policies, practices, and procedures over the years.

In considering the type of document needed to replace the *Handbook*, it was decided to aim at a broader utilization and a wider audience than the *Handbook* had served, and to produce a publication that could be used for training purposes as well as a reference. It was thus decided to produce a somewhat different document with a more practical and pragmatic focus that would be aimed at all users and providers of consulting services for ADB. This current *Consulting Services Operation Manual* (the *Manual*) is the product of that decision.

This *Manual* sets out the policies, practices, and procedures for recruiting and using consultants by ADB and its borrowers, covering the range of activities for which consultants are recruited, the different types of consultants and when their services are used, the range of differing consultant selection methods, and the procedures for the administration of consulting services by both ADB and its client borrowers.

A unique feature of the *Manual* is a self-study questionnaire provided at the end of each chapter. This is to be used as a summary of the chapter, as a review of the material covered, and as a basis for testing during training sessions.

The *Manual* should be seen as a user's guide and as a practical aid to the complex process of recruiting and supervising consultants. Any comments or advice on the *Manual* are very much welcome and may be addressed to:

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## Note

This *Consulting Services Operations Manual* supports the information contained in the *Guidelines on the Use of Consultants by Asian Development Bank and Its Borrowers* and the project administration instructions on recruiting and using consulting services. In cases of uncertainty or ambiguity, users should consult the *Guidelines* as the official and primary source of reference on recruiting consultants under ADB-financed projects.

It should also be noted that “benchmark” or “threshold” values given in this *Manual*— such as the contract amount at which technical assistance is delegated to the user division<sup>1</sup> or the contract amount at which various types of proposals are required—were valid during preparation in 2007. These values may change over time and should be checked with the latest project administration instructions in case of doubt or uncertainty about their validity.

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<sup>1</sup> The unit within ADB directly responsible for supervising consulting services.

# Abbreviations

ADB	Asian Development Bank
ADF	Asian Development Fund
ADTA	advisory technical assistance
BTP	biodata technical proposal
CMS	consultant management system
COSO	Central Operations Services Office
CPS	country partnership strategy
CQS	consultants' qualifications selection
CRAM	consultant recruitment activity monitoring (system)
CSC	consultant selection committee
CSRN	consulting services recruitment notice
CV	curriculum vitae
DACON	data on consulting firms
DICON	data on individual consultants
DMC	developing member country
EA	executing agency
EOI	expression of interest
ETP	evaluated total price
FBS	fixed-budget selection
FTP	full technical proposal
GEFP	gross evaluated financial proposal
GFP	gross financial proposal
ICS	individual consultant system
LCS	least-cost selection
MDB	multilateral development bank
NEFP	net evaluated financial proposal
NGO	nongovernment organization
OAGI	Integrity Division of the Office of the Auditor General
PAI	project administration instruction
PPTA	project preparatory technical assistance
QBS	quality-based selection
QCBS	quality- and cost-based selection
RETA	regional technical assistance
RFP	request for proposals
RRP	report and recommendation of the President
SRC	staff review committee
SSS	single-source selection
STP	simplified technical proposal
TA	technical assistance
TOR	terms of reference
UN	United Nations