



FREQUENTLY ASKED QUESTIONS ON CONSULTING SERVICES

AUGUST 2021

FREQUENTLY ASKED QUESTIONS ON CONSULTING SERVICES

AUGUST 2021



Creative Commons Attribution 3.0 IGO license (CC BY 3.0 IGO)

© 2021 Asian Development Bank
6 ADB Avenue, Mandaluyong City, 1550 Metro Manila, Philippines
Tel +63 2 632 4444; Fax +63 2 636 2444
www.adb.org

Some rights reserved. Published in 2021.

ISBN 978-92-9262-957-1 (print), 978-92-9262-958-8 (electronic); 978-92-9262-959-5 (ebook)
Publication Stock No. TIM210270-2
DOI: <http://dx.doi.org/10.22617/TIM210270-2>

The views expressed in this publication are those of the authors and do not necessarily reflect the views and policies of the Asian Development Bank (ADB) or its Board of Governors or the governments they represent.

ADB does not guarantee the accuracy of the data included in this publication and accepts no responsibility for any consequence of their use. The mention of specific companies or products of manufacturers does not imply that they are endorsed or recommended by ADB in preference to others of a similar nature that are not mentioned.

By making any designation of or reference to a particular territory or geographic area, or by using the term “country” in this document, ADB does not intend to make any judgments as to the legal or other status of any territory or area.

This work is available under the Creative Commons Attribution 3.0 IGO license (CC BY 3.0 IGO) <https://creativecommons.org/licenses/by/3.0/igo/>. By using the content of this publication, you agree to be bound by the terms of this license. For attribution, translations, adaptations, and permissions, please read the provisions and terms of use at <https://www.adb.org/terms-use#openaccess>.

This CC license does not apply to non-ADB copyright materials in this publication. If the material is attributed to another source, please contact the copyright owner or publisher of that source for permission to reproduce it. ADB cannot be held liable for any claims that arise as a result of your use of the material.

Please contact pubsmarketing@adb.org if you have questions or comments with respect to content, or if you wish to obtain copyright permission for your intended use that does not fall within these terms, or for permission to use the ADB logo.

Corrigenda to ADB publications may be found at <http://www.adb.org/publications/corrigenda>.

Note:

In this publication, “\$” refers to United States dollars.

On the cover: *Silhouette Group of Business People Meeting Concept* (ID 47308514 © Rawpixelimages | Dreamstime.com). Photo purchased from Dreamstime.com for this publication.

Contents

A	General	1
B	Selection and Contracting Method	5
C	Planning	9
D	Selection Procedure (Expression of Interest)	12
E	Preparing and Issuing the Request for Proposal	15
F	Technical Proposal Opening and Technical Evaluation	19
G	Financial Proposal Opening and Evaluation	23
H	Contract Negotiations	25

Frequently Asked Questions on Consulting Services

A. General

1 **What are consultants?**

The Asian Development Bank (ADB) defines consultants as individuals or entities able to provide special expertise in one or more technical fields.

For more information, refer to the Guidance Note on Consulting Services Administered by ADB Borrowers, June 2018, available at <https://www.adb.org/documents/consulting-services>.

2 **Which services shall be considered under “consulting services”?**

Consulting services are of intellectual and advisory nature, requiring evaluation of technical proposals that offer tailored approaches, methodologies, and specially qualified experts. Examples of consulting services include policy and governance studies; advice on institutional reforms; engineering designs; construction supervision; legal advice; forensic audits; procurement services; social and environmental studies; and the identification, preparation, and implementation of projects.

The executing agency of an ADB-assisted project may consult ADB to determine if a particular selection ought to be considered a consulting services assignment.

3 **Why are consulting services required?**

Consulting services are required when an organization (i) does not have the particular expertise in-house, (ii) has shortage of in-house resources, and (iii) the resources are required only for a finite period of time. Hiring of consulting services allows for the efficient allocation of resources toward specialized services for limited time without any obligation of permanent employment.

4 **How large are the largest consulting firms? How small are the smallest?**

The largest employ thousands of experts; the smallest consist of individual experts.

5 What are the guiding principles for the selection of consultants?

The Procurement Regulations for ADB Borrowers (2017, as amended from time to time) defines six core procurement principles: (i) economy, (ii) efficiency, (iii) fairness, (iv) transparency, (v) quality, and (vi) value for money. These may be elaborated upon as follows:

- (i) **Economy:** Taking into account factors such as price, quality, and any nonprice attributes as appropriate without adversely affecting the viability of the project.
- (ii) **Efficiency:** Ensuring that procurement processes are proportional to the value and risks of the required outcome and underlying project activities, taking into account implementation capacity, time constraints, and cost-effectiveness.
- (iii) **Fairness:** Ensuring (a) equal opportunity and treatment for consultants; (b) equitable distribution of rights and obligations between borrowers and providers of services; and (c) credible mechanisms for addressing procurement-related complaints and providing recourse.
- (iv) **Transparency:** Through appropriate documentation and review of the procurement process activities, ensuring that (a) relevant procurement information is made publicly available to all interested parties, in a consistent and timely manner, through readily accessible and widely available sources at no (or reasonable) cost; (b) there is appropriate reporting of procurement activity; and (c) confidentiality provisions in contracts are used only where justified.
- (v) **Quality:** Structuring procurement arrangements to procure inputs and deliver outputs of appropriate standard in a timely and effective manner to achieve the project outcomes and development objectives, taking into account the context, risk, value, and complexity of procurement.
- (vi) **Value for money:** Enabling the borrower to obtain optimal benefits through effective, efficient, and economic use of resources, by applying, as appropriate, the Core Procurement Principles and related considerations, which may include life-cycle costs and socioeconomic and environmental development objectives of the borrower. Price alone may not sufficiently represent value for money.

6 When is an individual normally recruited as a consultant?

An individual is recruited as a consultant for similar activities as consulting firms but when a full team is not considered necessary.

7 Where might individual consultants come from?

They may be independent experts not permanently associated with any particular firm, or employees of a firm, agency, institute, or university but recruited on an individual basis.

8 When should a team of consultants from a firm be recruited rather than individual consultants?

It is advisable for the assignment to be undertaken through a firm if more than four experts are required.

9 Is it compulsory to engage consultants in ADB-assisted projects?

No, the engagement of consultants depends on the needs of the project and is not compulsory.

10 What are the roles and responsibilities of ADB and the executing agency in the selection of consulting services?

For investment loans and grants financed in whole or in part by ADB, or by ADB-administered funds, borrowers normally undertake the procurement planning, consultant selection, contract management, and complaint resolution process. ADB may review the borrower's activities through key steps in the consultant selection process.

Please also refer to the Procurement Regulations for ADB Borrowers (2017), available at <https://www.adb.org/documents/procurement-regulations-adb-borrowers>.

11 In special circumstances, does ADB select consulting services for an executing agency?

In special circumstances, the borrower may request ADB's assistance in consultant selection. This occurs, for example, in high-value, complex procurement where the executing agency significantly lacks capacity or perceived independence from undue pressures. This approach should have already been identified in the procurement plan and reflected in the project documents. However, the executing agency will retain responsibility for contract negotiations, contract signing, and contract management.

While requesting ADB in writing to take responsibility for selecting a consultant, the borrower should adequately justify such a request and explain its necessity. ADB's proposed participation in the recruitment should be set out in the procurement plan and the report and recommendation of the President (RRP) or the technical assistance (TA) report. If the request is made after the loan, grant, or delegated TA is approved, it will be regarded as a change in implementation arrangements and will be dealt with in accordance with the Project

Administration Instructions (PAI) 5.02 (Change Loan and/or Grant Funded Projects) or 5.09 (Administering Grant-Financed Technical Assistance), as the case may be.

If approved, ADB takes responsibility only for selecting the consultant, and the executing agency retains the responsibility for negotiating and signing the contract with the consultant, issuing the notice to proceed, and supervising the consultant's services (contract management).

12 On what basis should the executing agency decide whether consultants are to be hired as individuals or through a consulting firm?

Firms are normally engaged for more complex assignments with higher impact that require a team of experts to provide a broad range of technical expertise. Usually firm engagements span over longer periods of time, where the risk of loss of continuity is comparatively high.

Individual consultants are typically more suitable for assignments that can be carried out independently. In some cases, individual consultants are more appropriate because of needed flexibility in urgency of mobilization, geographic dispersion, and timing of deployment.

The engagement of more than five individual consultants is only permissible where it can be demonstrated that the benefits outweigh the allocation of additional resources for recruitment, contracting, disbursement, coordination, and management of such individual consultants.

13 Can an executing agency use ADB's Consultant Management System (CMS) for the selection of consultants?

ADB's CMS is an online system that allows borrowers to periodically advertise consulting services opportunities through Consulting Services Recruitment Notices (CSRNs).

Borrowers can use the CMS to advertise all international, open, competitive bidding selections.

Future enhancements to the system may allow the executing agency to use CMS to issue requests for proposal (RFPs) and collect, and open said proposals.

14 Why is a firm or individual not permitted to submit a proposal for a project for which they have prepared the terms of reference (TOR)?

Consulting firms or individual consultants shall not be hired for any assignment that, by its nature, may be in conflict with another

assignment of the firm or individual. For example, consultants hired to prepare the TOR for an assignment shall not be hired for the assignment in question. However, in cases where the short-listed firm or individual consultant has prepared, for example, a study that is not in conflict with the assignment in question, the executing agency shall make available to all the short-listed consultants all information on this study with the RFP to ensure that one proposer has no unfair competitive advantage over the others.

Please also refer to the Standard RFP, Instructions to Consultants (ITC), para 3.3, available at <https://www.adb.org/sites/default/files/business-guide/436006/srfp-revised-202011.docx>.

Executing agencies must refer all possible and potential cases of conflict of interest to the ADB Project Unit for consultation and clearance with ADB's Office of Anticorruption and Integrity (OAI).

15 What steps may be taken if fraud and corruption are proven in the recruitment of consulting services?

- (i) The award or a proposal for award of contract may be rejected.
- (ii) If the consultancy is loan-funded, and if the situation is not remedied expeditiously by the borrower, the portion of financing involved may be cancelled.
- (iii) Sanctions may be imposed on any firm or individual, including the declaration of a consultant ineligible for recruitment under ADB financing either indefinitely or for a stated period of time, and any existing contract terminated.
- (iv) Disciplinary action may be taken by the borrower or ADB against any borrower or ADB personnel proven to have been involved in unethical practices.

Please also refer to the Standard RFP, Instructions to Consultants (ITC), para 6.3.1, available at <https://www.adb.org/sites/default/files/business-guide/436006/srfp-revised-202011.docx>.

B. Selection and Contracting Method

16 What are the selection methods used for consulting services?

Selection methods used for consulting services are

- (i) Quality and Cost Based Selection (QCBS),
- (ii) Quality Based Selection (QBS),
- (iii) Fixed Budget Selection (FBS),
- (iv) Least Cost Selection (LCS),
- (v) Consultant's Qualification Selection (CQS), and
- (vi) Direct Contracting (previously Single Source Selection or SSS).

Please also refer to Appendix 4 - Consulting Services Selection Using Open Competitive Bidding in the Procurement Regulations for ADB Borrowers (2017), available at <https://www.adb.org/documents/procurement-regulations-adb-borrowers>.

17 Which method is most commonly used for ADB- and borrower-administered consulting recruitment?

The QCBS method is most commonly used as it allows for both efficiency and economy by selecting first for technical competence and then adding a cost factor into the selection system.

18 When is the QCBS method appropriate for hiring consulting services?

The QCBS method is appropriate when (i) the scope of work can be precisely defined, (ii) the TOR are well specified and clear, and (iii) the borrower and the consultants can estimate with reasonable precision the personnel time as well as the other inputs required of the consultants. Technical and financial weights may be chosen, taking into account the complexity and impact of the assignment and the relative importance of quality. While the ADB default used to be 80:20 (technical to financial) earlier, nowadays 90:10 is more frequently used.

19 When is the QBS method appropriate for hiring consulting services?

In particular cases, consulting services are evaluated under the QBS method where only the quality of the technical proposals is evaluated.

The QBS method is appropriate (i) when assignments are complex or highly specialized, making it difficult to define the required input from the consultants and precise TOR; (ii) where the downstream impact is so large that the quality of the services is of overriding importance for the outcome of the project; and (iii) for assignments that can be carried out in substantially different ways such that financial proposals may be difficult to compare.

20 When is the FBS method appropriate for hiring consulting services?

The FBS method is appropriate only when (i) the TOR are precisely defined, (ii) the time and personnel inputs can be accurately assessed, and (iii) the budget is fixed and cannot be exceeded.

21 When is the LCS method appropriate for hiring consulting services?

The LCS method is appropriate for selecting consultants for very small assignments (generally less than \$100,000) of a standard or routine nature (audits, engineering design/ supervision of simple projects, and simple surveys) where well-established practices and standards exist.

22 When is the CQS method appropriate for hiring consulting services?

The CQS method may be used for assignments where (i) highly specialized expertise is required for the assignment, and recruitment of “boutique” consulting firms that provide depth of expertise in specific areas is contemplated; (ii) recruitment time is critical and the assignment is, typically, short-term; (iii) only a few consultants are qualified; and (iv) the preparation and evaluation of competitive proposals is not justified.

23 When is direct contracting appropriate for hiring consulting services?

Direct contracting is contracting without competition (also referred to as single source selection) and may be an appropriate method under special circumstances as below:

- (i) Additional items are required under an existing contract which was awarded in accordance with competitive procedures. ADB shall be satisfied in such cases that no better offer is likely to be received, and that the price to be paid is not more than the original price. Usually, the repeat order shall occur within 18 months of the original order, with the additional quantities not normally exceeding 30% of the original quantities.
- (ii) Standardization of equipment or spare parts compatible with existing equipment may justify additional purchases from the original supplier. For such purchases to be justified, the original equipment shall be suitable, the number of new items shall generally be less than the existing number, the price shall be reasonable, and the advantages of another make or source of equipment shall have been considered and rejected on grounds acceptable to ADB.
- (iii) The required equipment is proprietary and obtainable only from one source or, in the case of consulting services, only one firm is qualified or has experience of exceptional worth for the assignment.
- (iv) The contractor responsible for a process design requires the purchase of critical items from a particular supplier as a condition of a performance guarantee.
- (v) Civil works or nonconsulting services need to be contracted and are a natural extension of an earlier or ongoing job that was awarded following a competitive process, and it can be shown that the engagement of the same contractor will be more economical and will ensure compatibility of results in terms of quality of work.

- (vi) The consulting services tasks represent a natural continuation of previous work carried out by the consultant firm and continuity for downstream work is essential (e.g., continuity in the technical approach, experience acquired, and continued professional liability of the same consultant) and presents a clear advantage over renewed competition.
- (vii) The consultancy assignments are very small.
- (viii) The circumstances are exceptional, such as in response to natural disasters.

Please also refer to para 2.17 of the Procurement Regulations for ADB Borrowers (2017), available at <https://www.adb.org/documents/procurement-regulations-adb-borrowers>.

24 What are the different types of contracts for consulting services?

The different contracting arrangements available for consulting services are (i) time-based, (ii) lump sum, (iii) framework, (iv) retainer or contingency fee, and (v) performance-based contracts.

25 When is a “time-based” contract suitable for consulting services?

A time-based contract is used when it is difficult to define the scope, output, and the length of the services, either because the services are related to and await the completion of activities by others (for which the completion period may vary), or because the input of the consultants is difficult to assess. This type of contract will be used for complex studies, supervision of construction and advisory services.

26 When is a “lump sum” contract suitable for consulting services?

A lump sum contract is used for assignments in which the content, duration of services and the required output of the consultants are clearly defined. This includes simple planning and feasibility studies, environmental studies, detailed design of standard or common structures, service delivery assignments, and preparation of data processing systems.

27 When is a “framework” contract suitable for consulting services?

Framework contracts are most appropriate in situations exhibiting some of the following characteristics:

- (i) multiple call-offs over an extended period are envisaged;
- (ii) the activity is repeatable;
- (iii) discrete, generally “upstream services” are required, where methodologies are fairly standardized;
- (iv) urgent and lengthy tendering processes are impractical or inefficient;
- and (v) contracts may individually be relatively small, making

an expensive selection process inefficient (although in aggregate over the duration of the framework agreement, the value could be substantial).

28 When is a contract based on “retainer or contingency fee” suitable for consulting services?

Retainer and contingency fee contracts are widely used when consultants (banks or financial firms) are preparing companies for sales or mergers of firms, notably in privatization operations or similar assignments. The remuneration of the consultant includes a retainer and a success fee, the latter being normally expressed as a percentage of the sale price of the assets.

29 When is a “performance-based” contract suitable for consulting services?

A performance-based contract is used to enhance the delivery of consulting services outputs, thereby improving value for money. Payments to the consultant are triggered on achievement of selected milestones signifying that certain project deliverables (say, outcomes or outputs defined in the project design and monitoring frameworks) have been completed or achieved.

C. Planning

30 What aspects should be covered in a procurement plan for consulting services?

For consulting services, the plan will set forth (i) each particular contract package, (ii) proposed methods for selection of consulting services and type of proposal, and (iii) an overall indicative recruitment schedule and budget for each consulting contract package.

A sample procurement plan is included in Appendix 5 of the Guidance Note on Strategic Procurement Planning, available at <https://www.adb.org/documents/procurement-planning>.

31 What factors should be considered while preparing the TOR for any consulting assignment?

A typical TOR will, at a minimum, include (i) purpose of the assignment; (ii) project background; (iii) objectives of the assignment; (iv) scope of services; (v) detailed outputs of the assignment (and applicable quality standards, where relevant); (vi) key timelines (or milestones) and reporting requirements; (vii) relevant background information and material for the assignment; (viii) preliminary team composition and qualification requirements for key experts;

(ix) counterpart support, personnel, and facilities to be provided by the borrower (if any); and (x) duration and location of the assignment, and other relevant information.

A sample outline for a TOR is included in section 7 of the Standard Request for Proposals (RFP), available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

32 What are the important aspects considered while preparing cost estimates for consulting services? Where may a good sample of cost estimates be referred to?

In preparing cost estimates, quantify the type of consultants needed and their estimated time inputs to deliver the various contemplated work tasks to be assigned to each expert. Cost estimates normally cover remuneration and out-of-pocket expenses (OPEs) as competitive cost categories. In addition, the estimate may include “provisional sums” which cover the cost of workshops, seminars, conferences, surveys, and equipment. Apart from remuneration, OPE, and provisional sums, cost estimates typically shall include costs for contingency (usually 5%–10% of the total cost estimate). The estimate for remuneration proposed by consulting firms for key experts should normally take into account social charges, back office support, overheads, profit, price escalation, etc., especially if no price adjustment is provided in the contract.

The reference for a good sample of cost estimates may be drawn from the previous contract (with escalation) or recent contracts of similar type entered into by the said executing agency or other executing agencies in the field.

33 Can the executing agency change the selection method after a loan has been approved?

Any change in the selection method or the introduction of new selection methods requires ADB approval, barring a shift to QCBS from other selection methods. However, even within QCBS, any change in the technical-to-financial weight ratio must be cleared with ADB.

34 What types of consulting services are needed at various stages of the project cycle?

- (i) Staff consultants are often required when preparing country partnership strategies.
- (ii) Staff consultants are often required when preparing project preparatory technical assistance (PPTA), advisory technical assistance (ADTA), and regional technical assistance (RETA).

- (iii) Teams of consultants from firms or individual consultants are required when implementing ADTA and RETA.
- (iv) Teams of consultants from firms and individual consultants are required when preparing a project through the implementation of a PPTA.
- (v) Staff consultants are often required to support ADB staff during loan fact-finding and appraisal.
- (vi) Individual consultants and teams of consultants from firms are usually required to provide support during project implementation.
- (vii) Sometimes staff consultants are also used for in-house studies and to help with various tasks, such as project evaluations.

35 What does an implementation schedule normally show?

An implementation schedule includes the phased time inputs for individual tasks as well as tangible outputs and activities such as reports, workshops, and seminars.

36 What is the best way to identify the expertise required for consulting services?

For each task listed in the implementation schedule, ask the questions, “Who will do this? What qualification should the expert possess? What kind of expertise is desired? What kind of international or regional experience is preferred?”

37 What are the core items of a TOR? How are they derived?

The comprehensive listing of tasks and duties for each consultant forms the core of any TOR. Please refer to question 31.

A sample TOR outline is presented in section 7 of the Standard Request for Proposals (RFP), available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

38 In terms of consulting services, what is the purpose of procurement capacity assessment?

Procurement capacity assessment of consulting services aims to

- (i) identify the capacity, procurement, and organizational constraints that might hinder effective project implementation;
- (ii) determine the overall recruitment risk;
- (iii) define training needs; and
- (iv) define the level of oversight required.

39 In terms of consulting services, what is the purpose of the procurement plan?

The procurement plan aims to address the constraints identified by the capacity assessment, put in place appropriate review and supervision processes to mitigate risks, and build up the borrower's capacity to undertake recruitment and procurement activities beyond the project's life cycle.

40 What should the procurement plan include?

It should finalize the recruitment arrangements for consultants and detail the prior review, post review, and supervision arrangements for the recruitment process. It should indicate, among other items, the budget for each recruitment package, the selection method, the type of proposal, and the time period envisaged for the recruitment process.

A sample procurement plan can be found in Appendix 5 of the Guidance Note on Strategic Procurement Planning, available at <https://www.adb.org/documents/procurement-planning>.

D. Selection Procedure (Expression of Interest)

41 What are the requirements for the international advertisement of a Request for Expressions of Interest (REOI) for consulting assignments?

The REOI must be publicly advertised on ADB's CMS using the CSRN mechanism and on an appropriate website in the borrower's country (or newspaper in national circulation including at least one English language newspaper, if available).

The CSRN must include information on the TOR, cost estimate, selection method, and time frame for recruitment, as defined in the consultant section of the procurement plan. The CSRN should also indicate the short-listing evaluation criteria.

42 What are the requirements for the national advertisement of REOI for consulting assignments?

The REOI may be published in the national press, official gazette, or a free and publicly accessible website preferably in the English language. Advertisement in ADB's CMS using the CSRN is strongly encouraged for any such national consulting assignment.

The CSRN must include information on the TOR, cost estimate, selection method, and time frame for recruitment, as defined in the consultant section of the procurement plan. The CSRN should also indicate the short-listing evaluation criteria.

43 What is the normal advertisement period for consulting assignment?

For higher-value contracts, the normal advertisement period is not less than 15 calendar days when using electronic methods, such as CMS, with electronic collation of all EOIs, or 30 calendar days in cases where posting is not solely electronic. For lower-value contracts or in situations where quick mobilization is necessary (such as emergencies), at least 7 calendar days should be provided if electronic submission of EOIs is used (say, through CMS).

44 What shall be the criteria for short-listing of consultants?

The CSRN must set out the key objective criteria to be applied to determine an appropriate short list of firms from the EOIs submitted for the assignment. The three main criteria used in the evaluation of EOIs are technical competence; country, regional, and sector experience; and managerial and organizational capabilities. Any other criterion set out in the CSRN (for instance, past performance on similar consulting contracts) should be approved by ADB.

45 What types of association may consulting firms form while submitting EOIs?

The consulting firms may form the following types of association: (i) joint venture, and (ii) subconsultant.

46 Do joint ventures need to submit the joint venture agreement at the EOI stage?

If a joint venture submits an EOI, they must submit a Memorandum of Intent to form a joint venture that explicitly identifies the lead entity entitled to conduct all business on behalf of the joint venture and commits to submitting a joint venture agreement on required terms and conditions, if short-listed. This memo is not required if the entity intends to associate with other entities as subconsultants.

47 Is it necessary to short list six firms for a consulting assignment?

As per the Guidelines on the Use of Consultants by Asian Development Bank and Its Borrowers (March 2013), normally a short list comprises of six firms. However, under the ADB Procurement Policy (2017) and the Procurement Regulations for ADB Borrowers (2017), the borrower may decide to limit the numbers of firms in the short list, if appropriate to the context of the assignment. For example, when only a few qualified firms have expressed interest in the specific assignment or when the size of the

contract does not justify wider competition. The ADB Procurement Policy (2017) and the Procurement Regulations for ADB Borrowers (2017) are applicable to projects with concept notes approved on or after 1 July 2017 in principle.

48 Is it necessary for a short list to consist of firms with geographic spread across ADB member countries, usually including one from a DMC?

As per the new ADB Procurement Policy (2017) and the Procurement Regulations for Borrowers (2017), for projects with concept notes approved on or after 1 July 2017 in principle, there is no requirement for short-listing firms with geographic spread across ADB member countries and one from a DMC.

49 Can late EOIs be considered for evaluation?

The executing agency may exercise discretion in accepting late EOIs in case the number of qualified EOIs submitted prior to the deadline is insufficient.

50 What are the key steps in the preparation of the TOR?

The key steps in the preparation of the TOR are listed below.

- (i) Determine whether the contract should be output-based or input-based.
- (ii) Finalize the content of the TOR, including
 - a) project background;
 - b) purpose of the assignment;
 - c) duration and location of the services;
 - d) scope of services;
 - e) tasks (components), expected deliverables, and time frame;
 - f) detailed outputs of the assignment, including
 - key timelines or milestones;
 - team composition and key expert qualification requirements;
 - reporting requirements and time schedule for deliverables;
 - relevant background information or materials required for the assignment;
 - indication whether downstream work is potentially considered; training and capacity building requirement;
 - procurement, asset management and transfer and insurance requirements for equipment to be procured; and
 - g) client's input and counterpart personnel.

E. Preparing and Issuing the Request for Proposal

51 What are the different types of technical proposals for selecting consulting firms?

The executing agency may select consulting firms based on (i) Full Technical Proposal (FTP), (ii) Simplified Technical Proposal (STP), or (iii) Biodata Technical Proposal (BTP).

52 When is an FTP, STP, or BTP normally used?

- (i) An FTP is required for an assignment with a complex TOR. The monetary value of the assignment is not the only determining factor of complexity.
- (ii) An STP suffices for an assignment with a well-defined TOR. Generally, STPs are shorter than FTPs because they do not include information about the organization and experience of the prospective consulting entity. Therefore, when using STP, the executing agency should carefully examine the various contenders, their associates, and partners before short-listing them.
- (iii) A BTP may be requested for assignments with well-defined, position-based TORs. It neither includes information on organization and experience of the consultant nor a detailed “method” section.

53 What information needs to be provided as part of FTP, STP and BTP?

The information required in different types of proposals is as follows:

Information Required	Full Technical Proposal	Simplified Technical Proposal	Biodata Technical Proposal
Description of the approach, methodology, and work plan for performing the assignment	√	√	
Team composition, task assignments, and summary profile	√	√	√
Work schedule	√	√	√
Personnel schedule	√	√	√
Resumes of proposed experts	√	√	√
Consultant’s organization and experience	√		

Comments or suggestions on the terms of reference	√
Comments on the executing agency counterpart staff and facilities	√

A Checklist of Required Forms (information) is also available in section 3 of the Standard Request for Proposals (RFP), available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

54 What is the preparation period to be provided for FTP, STP, and BTP?

The maximum time period allocated for the preparation of proposals is as follows:

Type of Proposal	Time (in days) for Preparation of Proposal (from issue of RFP to last date of submission)	
	Normal Submission	e-Procurement System
Full Technical Proposal	45	35
Simplified Technical Proposal	35	25
Biodata Technical Proposal	21	15

55 What are the suggested evaluation weight ranges for FTP, STP and BTP?

The suggested evaluation weight ranges for FTP, STP and BTP are:

- (i) FTP
 - a) Firm’s qualifications and experience: 100–200 points.
 - b) Approach and methodology: 200–400 points.
 - c) Personnel biodata: 500–700 points.
 - d) Total: 1,000 points.
- (ii) STP
 - a) Approach and methodology: 300 points (generally).
 - b) Personnel biodata: 700 points (generally).
 - c) Total: 1,000 points.
- (iii) BTP
 - a) Work plan and personnel schedule: 100 points (generally).
 - b) Personnel biodata: 900 points (generally).
 - c) Total: 1,000 points.

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

56 What are the suggested weights for key experts?

The suggested weights for key experts are

- (i) 10%–20% for qualification and general experience;
- (ii) 60%–80% for project-related experience; and
- (iii) 10%–20% for experience that may be overseas, country-level, or with international organizations.

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

57 Is it mandatory for experts engaged in the consulting assignment to only be from ADB member countries?

ADB permits bidders from all eligible countries. The definition of eligibility varies by the financing source(s) for the specific loan or grant. There are three categories of eligibility:

- (i) full ADB member country eligibility for loans or grants funded by ADB's ordinary capital resources or other ADB-administered funds;
- (ii) restricted ADB member country eligibility for loans or grants funded by Special Funds, whereby only the ADB developed member countries that have contributed to such resources are eligible, as well as all ADB DMCs; and
- (iii) eligibility beyond ADB member countries only in cases where universal procurement applies.

Section 5 of the Standard RFP, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>, contains the precise eligibility wording to be used in packages and CSRNs, depending on the funding source and other considerations.

Borrowers are otherwise not permitted to deny the participation of a bidder, or to disqualify the bidder, for reasons unrelated to those that are essential to ensure a bidder's capability and resources to successfully perform the relevant contract.

Consulting firms must be legally incorporated or organized as legal entities under the laws of the eligible country. Experts employed or engaged by an eligible consulting firm will be considered eligible regardless of their nationality. Individual consultants (whether engaged independently or through firms) must hold a valid passport or a valid government identification card issued to nationals of the relevant eligible country, as defined in the RFP.

- 58 The data sheet of the RFP has an option for allowing short-listed consultants to enhance their expertise for the assignment by associating with other consultants in the form of a joint venture or as subconsultants. What factors should be considered while allowing such associations?**

The default provision of the user's guide states that the short-listed consultants may associate with non-short-listed consultant(s) but **not** with other short-listed consultants.

The executing agency should use this provision judiciously, based on the requirement of the assignment. Any deviations from the default provisions would require ADB's prior approval. Please refer to RFP-Data Sheet 14.1.1.

- 59 Is a pre-proposal conference compulsory?**

Pre-proposal conferences are not compulsory but they are advised for complex/high value assignments so that the consultants are familiar with the TOR, and the minutes of meeting can provide clarifications on any question raised by short-listed consultants.

- 60 What should be considered by the executing agency while issuing the minutes of meeting of a pre-proposal conference?**

The minutes of this meeting must include all questions raised by short-listed consultants (without identifying the source of the questions) and the client's response to each of the questions, and be circulated to all short-listed consultants after the meeting.

- 61 A short-listed consultant prepared the feasibility study related to the assignment (but is not deemed conflicted), which provides unfair competitive advantage to this short-listed firm. How can such an advantage be mitigated?**

Where a short-listed consultant has prepared the feasibility study related to the assignment (but is not deemed conflicted) for which proposals have been invited, the client must make all the relevant information regarding the feasibility study available to all short-listed consultants either through hard copy or by providing specific URL links to the soft copies.

Executing agencies must consult with ADB regarding firms with potential conflict of interest or unfair competitive advantage.

- 62 What shall be done if any key expert becomes unavailable for the extended validity period?**

If any of the key experts becomes unavailable for the extended validity period, the consultant shall provide an adequate written justification

and evidence satisfactory to the client together with the substitution request. In this case, the replacement key expert shall have equal or better qualifications and experience than those of the originally proposed key expert.

Please also refer to the Standard RFP ITC, para 12.7.

F. Technical Proposal Opening and Technical Evaluation

63 Where is the best place to find forthcoming consulting services assignments advertised?

The best place to find forthcoming consulting services assignments advertised is the ADB website, under “proposed projects.” Further information on TA grant-funded consultancies is provided under CSRN, also on the website. For approved loan projects, information is given under procurement notices.

At <http://cms.adb.org/> see Consulting Opportunities (top left button).

64 Who normally prepares the short-listing criteria?

The project office of the executing agency prepares the short-listing criteria for the executing agency recruitment. For direct ADB recruitment this role is played by the ADB project officer.

ADB-recommended EOI evaluation criteria include the following:

- (i) **Eligibility declaration.**
 - a) The bidder was not involved in preparing the TOR for the assignment.
 - b) The bidding firm and its associates (joint venture partners or subconsultants) are not currently sanctioned by ADB.
- (ii) **Management competence.** Details of structure and management of the bidding firm.
- (iii) **Technical competence.** The bidding firm’s experience is relevant for the TOR.
- (iv) **Geographical competence.** The bidding firm has appropriate country or regional experience specified in the TOR as being relevant for the assignment.

65 What are some typical short-listing criteria?

Typical short-listing criteria include

- (i) experience in activities similar to the consultancy, similar geographical areas, and project authorities;

- (ii) experience with ADB projects or TA (especially important for PPTA);
- (iii) suitability of the nature of the firm (for example, whether it is a small, specialized firm with limited staff or a large firm with access to a pool of expertise);
- (iv) firm history (that is, whether it has been in business for an extended period and developed a track record in the field or region); and
- (v) the degree of in-house quality control (for example, if the firm adheres to the requirements of the International Standards Organization or has an ethics code).

66 What shall be read out during the opening of the technical proposals?

At the opening of the technical proposals, the following shall be read out: (i) the name and the country of the consultant or, in case of a joint venture, the name of the joint venture, the name of the lead member and the names and the countries of all members; (ii) the presence or absence of a duly sealed envelope with the financial proposal; (iii) any modifications to the proposal submitted prior to the proposal submission deadline; and (iv) any other information deemed appropriate or as indicated in the data sheet.

67 What are the four basic documents used for the technical evaluation of proposals?

Technical evaluation of the proposals is based on

- (i) the content of the proposals,
- (ii) the TOR,
- (iii) a summary evaluation sheet (SES),
- (iv) a personnel evaluation sheet (PES), and
- (v) the approved Narrative Evaluation Criteria (NEC).

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

68 In evaluating approach and methodology, what factors should be assessed?

Approach and methodology assessment is based on

- (i) the consultant's understanding of the objectives,
- (ii) quality of methodology,
- (iii) degree of innovativeness,
- (iv) quality of the work plan,
- (v) quality of the staffing schedule (including the organization chart),

- (vi) requirement for counterpart facilities, and
- (vii) the proposal presentation.

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

69 During evaluation, can the executing agency request the consultant to provide clarification on any matter related to the consultant's technical or financial proposal?

From the time the proposals are received by the client to the time that the contract is awarded, the client shall not request the consultant to provide clarification on any matter related to the consultant's technical or financial proposal. In exceptional cases and with prior approval of ADB, the client may request clarifications to minor queries or correction of obvious errors or inconsistencies. This request shall be made in writing and copied to ADB.

RFP Instructions to Clients (ITC), para 20.3.

70 In case the name of a short-listed consultant changes during the technical proposal submission, what documents shall be considered to verify the change in name of the firm?

Any change in name of the firm needs to be confirmed by the original certificate of incorporation in the EOI and its amendment.

71 If the technical evaluation of the consultant profile or resume reveals that a proposed key expert did not meet the basic educational qualification required but fulfilled the experience criteria, would this expert be disqualified?

According to standard RFP, a nominated expert may be rated "zero or 0%" (resulting in disqualification) under the following circumstances:

- (i) The expert is proposed for a national position but is not a citizen of that country.
- (ii) The expert failed to state his citizenship on the curriculum vitae.
- (iii) The expert is a current employee of the client.
- (iv) The consultant and the expert failed to disclose any situation of an actual or potential conflict of interest, sanctions, criminal records, or other information that would make the expert ineligible under sections 5 and 6 (related to experts).

Barring the four criteria above, if an expert does not meet a standard or requirement of the TOR, the executing agency should assess their

value for the assignment and rate them in the “below average” range (1%–69%).

72 If an expert is proposed by multiple consultants for the same position, should this expert be disqualified?

No, submission of the curriculum vitae of the same expert by multiple consultants does not disqualify them. However, a uniform rating should be applied to the said expert if the resumes are presenting largely the same information. If the resumes submitted by different consultants present significantly different information, the ratings applied will vary accordingly.

73 How shall evaluation be done in case a consultant proposes more than one expert for a position?

If a technical proposal nominates more than one expert for a position, the consultant selection committee of the executing agency should evaluate all candidates for the position and apply the lowest rating among them in the PES and SES.

74 How should consultants whose proposals were considered nonresponsive to the RFP and TOR or did not meet the minimum qualifying technical score be notified?

After the technical evaluation is completed and ADB has issued its no-objection (if applicable), the client shall notify those consultants whose proposals were considered nonresponsive to the RFP and TOR or did not meet the minimum qualifying technical score. At this stage the client shall provide information on the consultant’s overall technical score and convey that their financial proposals will be returned unopened after completing the selection process and contract signing.

Please also refer to RFP ITC 23.1.

75 What should be notified to the consultants that have achieved the minimum overall technical score?

The client shall notify in writing, the consultants that have achieved the minimum overall technical score and inform them of the date, time, and location of the opening of the financial proposals.

Please also refer to RFP ITC 23.1.

76 Can the averaging method be used for deciding the rating of the Consultant Selection Committee (CSC)?

It is not appropriate to apply the averaging method in deciding the CSC’s rating. Instead, the rating must be arrived at based on

consensus among CSC members after discussion, supported by notes in the minutes and corresponding justification.

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

77 What aspects must be considered by the CSC while detailing the NEC for “Experience in Similar Projects”?

The NEC are meant to facilitate discussion rather than defining a mechanical process under which the number of reference projects are counted. The CSC should strive to identify and differentiate the relevance of each project or experience presented in the proposal. The scoring method should be based on number of relevant reference projects, the length and depth of involvement of consulting entity in the relevant projects.

Guide and Model Narrative Evaluation Criteria (NEC) for FTP, STP and BTP evaluation, updated April 2020, available at <https://www.adb.org/documents/recruitment-firms-individual-consultants-executing-agencies>.

G. Financial Proposal Opening and Evaluation

78 What shall be read out during the opening of financial proposals?

At the opening, the names of the consultants and the overall technical scores shall be read aloud. The financial proposals will then be inspected to confirm that they have remained sealed and unopened. These financial proposals shall then be opened, and the total prices read aloud and recorded. Copies of the record shall be sent to all consultants who submitted proposals.

Please also refer to RFP ITC 23.2.

79 How to apply correction for an item described in the technical proposal but not priced in the financial proposal?

Activities and items described in the technical proposal but not priced in the financial proposal, shall be assumed to be included in the prices of other activities or items, and no correction is made to the financial proposal.

Please also refer to RFP ITC 24.

80 How to apply arithmetical corrections or price adjustments in case of lump sum contracts?

If a lump sum contract form is included in the RFP, the consultant is deemed to have included all prices in the financial proposal, so neither arithmetical corrections nor price adjustments shall be made. The total price, net of taxes specified in the financial proposal shall be considered as the offered price.

Please also refer to RFP ITC 24.2.

81 How to apply arithmetical corrections or price adjustments in case of time-based contracts?

In case of a time-based contract form, the client's evaluation committee will (i) correct any computational or arithmetical errors and (ii) adjust the prices if they fail to reflect all inputs included for the activities or items in the technical proposal.

If there is a discrepancy between (i) a partial amount (subtotal) and the total amount, or (ii) between the amount derived by multiplication of a unit price with the quantity and the total price, or (iii) between words and figures, the former will prevail.

In case there is a discrepancy between the technical and financial proposals in indicating quantities of input, the technical proposal prevails and the client's evaluation committee shall correct the quantity indicated in the financial proposal so as to make it consistent with the technical proposal, apply the relevant unit price included in the financial proposal to the corrected quantity, and correct the total proposal cost.

Please also refer to RFP ITC 24.1.1.

82 How are taxes taken under consideration in financial evaluation?

All taxes are deemed included in the consultant's financial proposal, and, therefore, included in the evaluation, barring the following, which the client will exclude (i) all local identifiable indirect taxes such as sales tax, excise tax, VAT, or similar taxes levied on the contract invoices; and (ii) all additional local indirect taxes on the remuneration of services rendered by nonresident experts of the consultant in the client's country.

Please also refer to RFP ITC 25.

83 What date shall be considered for converting prices into single currency for evaluation?

For evaluation purposes, prices shall be converted to a single currency using the selling rates of exchange, source, and date indicated in the data sheet.

The date shall not be earlier than 4 weeks prior to the deadline for submission of proposals and no later than the date of the original validity of proposals.

84 Describe how the combined quality and cost evaluation is done in case of QCBS?

- (i) The lowest evaluated financial proposal (F_m) is given the maximum financial score (Sf_m) of 1,000.
- (ii) The formula for determining the financial score (Sf) of any other proposal i is calculated as follows: $Sf_i = 1,000 \times F_m / F_i$,
 - a) in which “ Sf_i ” is the financial score of proposal i ,
 - b) “ F_m ” is the lowest evaluated total price (ETP), and
 - c) “ F_i ” is the ETP of proposal i under consideration.

Proposals are ranked according S which is their combined technical (St) and financial (Sf) scores using the weights (where, T is the weight assigned to the technical proposal and P is the weight assigned to the financial proposal; $T + P = 1$) as following:

$$S = St \times T\% + Sf \times P\%.$$

Please also refer to RFP data sheet (DS) 27.1.

85 Describe how the combined quality and cost evaluation is done in case of FBS?

In the case of FBS, proposals that exceed the budget shall be rejected. The client will select the consultant that submitted the technical proposal with the highest score that does not exceed the budget indicated in the RFP, and invite that consultant to negotiate the contract.

Please also refer to RFP ITC / DS 14.1.4 and 27.2.

86 Describe how the combined quality and cost evaluation is done in case of LCS?

In the case of LCS, the client will select the consultant with the lowest ETP from among the consultants that achieved the minimum technical score, and invite the consultant to negotiate the contract.

Please also refer to RFP ITC 27.4.

H. Contract Negotiations

87 When is an invitation to negotiate a contract sent to a consulting firm?

An invitation to negotiate a contract is normally sent to a consulting firm when

- (i) under QCBS, a first-ranked firm has been selected after technical and financial evaluation;

- (ii) under QBS, a first-ranked firm has been selected after technical evaluation;
- (iii) under FBS, a first-ranked firm has been selected after technical evaluation and the financial proposals have been verified as correctly presented within budget;
- (iv) under LCS, the firm with the lowest ETP from among firms with technical score of at least 750 points has been selected after technical evaluation and review of the financial proposals; or
- (v) under CQS and SSS, the proposal of the firm invited to submit a proposal has been reviewed and is considered acceptable from both technical and financial points of view.

88 What are the main activities in preparing for negotiations?

The main activities in preparing for negotiations are

- (i) review of relevant documentation,
- (ii) review of standard draft contracts,
- (iii) identification of and agreement on key issues, and
- (iv) preliminary preparation of the special conditions section of the standard contract.

Please also refer to Procurement Staff Instructions, part II, section B, Appendix 13: Negotiations, page 166, available at <https://www.adb.org/sites/default/files/institutional-document/545721/procurement-staff-instructions-complete.pdf>.

89 What is the main purpose of negotiations?

The main purpose of the negotiation is to turn the firm's proposal into a contract that can be implemented to the mutual benefit of both parties and, critically, to the benefit of the overall project.

90 What should the invitation letter for contract negotiation contain?

The invitation letter for contract negotiation should contain

- (i) confirmation that the firm has been ranked first;
- (ii) an invitation to send an authorized representative to negotiate the proposal and finalize a contract on behalf of the firm (bringing a letter of authority);
- (iii) a proposed schedule and agenda;
- (iv) a request to confirm the availability of team members nominated in its technical proposal (through signed undertaking from the relevant experts); and
- (v) a summary of issues identified during the technical or financial evaluation that could be subject to clarification or correction during negotiations.

Please also refer to Procurement Staff Instructions, part II, section B, Appendix 13: Negotiations, page 166, available at <https://www.adb.org/sites/default/files/institutional-document/545721/procurement-staff-instructions-complete.pdf>.

91 What checks shall be made by the executing agency during contract negotiations?

During contract negotiations, the executing agency shall ensure that

- (i) the consultant representative has a written power of attorney to negotiate and sign a contract on behalf of the consultant;
- (ii) the consultant confirms the eligibility and performance records of each member of the team proposed by the selected firm;
- (iii) any team member rated “below average” or “non-complying” is replaced by the consultant;
- (iv) the consultant confirms the availability of all team members nominated in its technical proposal for participation under the contract;
- (v) it provides the support and facilities it has committed to the consultant in the course of the contract and arrives at mutually agreed responsibilities; and
- (vi) issues identified during the technical or financial evaluation that could be subject to clarification or correction during negotiations are indicated in the letter of invitation for contract negotiations.

Please also refer to Procurement Staff Instructions, part II, section B, Appendix 13: Negotiations, page 166, available at <https://www.adb.org/sites/default/files/institutional-document/545721/procurement-staff-instructions-complete.pdf>.

92 How can the availability of all team members nominated by the consultant in its technical proposal be confirmed by the executing agency?

The availability of all team members nominated by the consultant in its technical proposal can be confirmed by requiring the relevant experts to sign an express undertaking to this effect.

93 Why is it important for the executing agency to confirm its counterpart support?

If it turns out that the counterpart support outlined in the RFP will not, in reality, be forthcoming, then additional funding may need to be provided, generally under OPE, to procure this support from other sources.

94 Under what circumstances should the executing agency allow the consultant to replace personnel?

The executing agency should only allow the consultant to replace personnel in exceptional circumstances wherein the proposed team member becomes unavailable due to reasons beyond the bidder's control, including unforeseen events such as illness or death.

95 Under what circumstances can the executing agency request the consultant to replace a team member?

The executing agency may request the consultant to replace experts who are

- (i) rated "below average" or "non-complying" during the evaluation;
- (ii) rated unsatisfactory on a previous assignment; or
- (iii) ineligible.

Please also refer to Procurement Staff Instructions, part II, section B, Appendix 13: Negotiations, page 166, available at <https://www.adb.org/sites/default/files/institutional-document/545721/procurement-staff-instructions-complete.pdf>.

96 What shall be included in technical negotiations?

Technical negotiations shall include a discussion on the TOR, the proposed methodology, the client's inputs, the special conditions of the contract, and finalizing the "Description of Services" of the contract.

These discussions shall not substantially alter the original scope of services under the TOR or the terms of the contract, lest the quality of the final product, its price, or the relevance of the initial evaluation be affected.

Please also refer to Procurement Staff Instructions, part II, section B, Appendix 13: Negotiations, page 166, available at <https://www.adb.org/sites/default/files/institutional-document/545721/procurement-staff-instructions-complete.pdf>.

97 What shall be included in financial negotiations?

Financial negotiations shall include the clarification of the consultant's tax liability in the client's country and shall define how it should be reflected in the contract.

For QCBS, FBS, and LCS, negotiations on any aspect of the bidder's price proposal is normally not permitted in the absence of manifest error or other exceptional circumstances.

Please also refer to Standard RFP, Special Conditions of Contract (SCC), sections 43.1 and 43.2, available at <https://www.adb.org/sites/default/files/business-guide/436006/summary-changes-standard-rfp-202011.docx>, which states that, "The Bank leaves it to the Client to

decide whether the Consultant (i) should be exempted from indirect local tax, or (ii) should be reimbursed by the Client for any such tax they might have to pay (or that the Client would pay such tax on behalf of the Consultant)”.

98 What shall be done by the executing agency in case the negotiations fail?

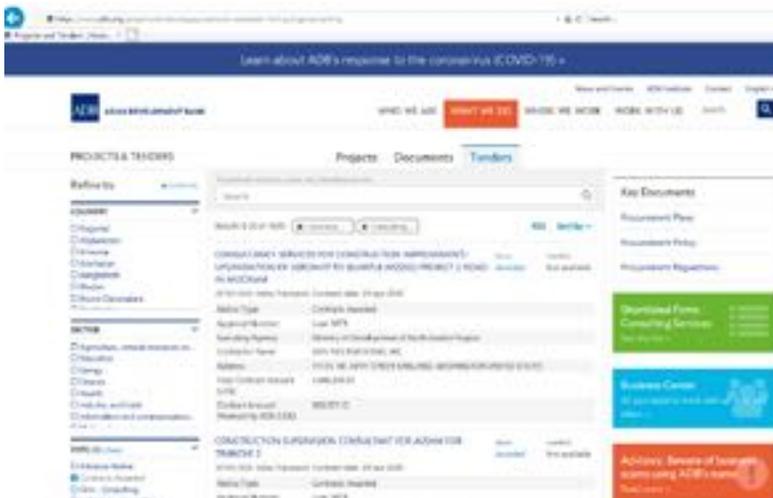
If the negotiations fail, the executing agency shall inform the consultant in writing of all pending issues and disagreements and provide a final opportunity to the consultant to respond. If the disagreement persists, the executing agency shall terminate the negotiations, with ADB’s prior approval, informing the consultant of the reasons for doing so in writing, and start negotiations with the next-ranked consultant, and so on until an agreement is reached.

99 What information shall be normally disclosed by the executing agency after the signing of a consulting contract?

Sample content on a typical ADB Contracts Awarded page:

- (i) Package Name
- (ii) Project Number
- (iii) Loan Approval Number
- (iv) Executing Agency
- (v) Consultant’s Name
- (vi) Consultant’s Address
- (vii) Contract Amount (US\$)
- (viii) Contract Amount Financed by ADB (US\$)

<https://www.adb.org/site/business-opportunities/operational-procurement/goods-services/contracts-awarded>



Frequently Asked Questions on Consulting Services

This document aims to capture and disseminate knowledge on consultant selection procedures for projects financed by the Asian Development Bank (ADB). The materials were based on ADB's experience and interactions with executing and implementing agencies over the years while reviewing consulting services transactions of ADB-financed projects in India, and issues raised in procurement clinics and trainings organized by the ADB India Resident Mission's Capacity Development Resource Center. The document is designed to serve as a ready reckoner for ADB's executing and implementing agencies, particularly the newer ones, and to guide them on procurement matters in their day-to-day operations.

About the Asian Development Bank

ADB is committed to achieving a prosperous, inclusive, resilient, and sustainable Asia and the Pacific, while sustaining its efforts to eradicate extreme poverty. Established in 1966, it is owned by 68 members—49 from the region. Its main instruments for helping its developing member countries are policy dialogue, loans, equity investments, guarantees, grants, and technical assistance.



ASIAN DEVELOPMENT BANK

6 ADB Avenue, Mandaluyong City

1550 Metro Manila, Philippines

www.adb.org