The New Development Bank

Request for Proposal

(This is not a Purchase Order)

1. **Introduction**

The New Development Bank (NDB) is issuing a Request for Proposal (RFP) to invite qualified suppliers to provide proposals to NDB's S-IT-2023-01192 IT Strategy Consultancy Services. Please refer to the following information or attached TOR (Service Scope) for detailed requirements.

Those interested and qualified companies please register into NDB's e-procurement system (EPS) to be **NDB's registered suppliers** and participate in the bidding process (**please be noted the contact information provided in registration especially email address must be correct as all communications regarding the bid including RFP distribution and award notice will be sent through it**). NDB will choose the most suitable one(s) from the shortlisted suppliers. NDB at its sole discretion reserves the right to reject all proposals in accordance with its internal policy and guidelines.

2. **RFP Schedule**

Please be noted the following activities could take place in the RFP process. NDB will inform the specific arrangements in advance and the suppliers are requested to respond timely.

Activity	Date
Distribution of RFP	August 21st, 2023
Deadline for Questions	September 12th, 2023
Proposal Response Due*	September 15th, 2023
Negotiation on contract	TBC
Signing Contract	TBC
Project Kick Off	TBC

*Decision about second round can be done based on the results of first proposals review.

3. Instruction to bidders

3.1 Contact Information

Please use the following contact information for all correspondence with NDB concerning this RFP. **Suppliers who solicit information about this RFP either directly or indirectly from other sources will be disqualified.**

Mr. Ivan Nepeivoda
Email: nepeivoda.ivan@ndb.int

3.2 Submission of Proposals

Proposals shall be prepared in English. Both hard copy and electronic version is acceptable. Hard copy (6copies at least) is **optiona**l and shall be sent in sealed covers. Electronic version is **obligatory** and shall be submitted online via Electronic Procurement System.

For submission of proposal, the qualified suppliers should register to NDB's e-procurement system to be **NDB registered suppliers** (subject to NDB's internal approval) in advance. Then registered suppliers need to **ENROLL** in the procurement notice (for open competitive bidding) or **ACCEPT** the invitation (for limited competitive bidding) before submitting proposal online according to the timeline. (https://www.ndb.int/data-and-documents/corporate-procurements/)

The mentioning of deadline, due time, closing date, etc. herein means Beijing time; and NDB's business time is from 9:00AM to 5:15PM in working days.

3.3 Questions

Please submit questions in writing by e-mail. Vendors should refer to the specific RFP paragraph number and page and should quote the questioned passage. NDB will be prompt in responding to questions. Questions can be responded to as a group and sent to all vendors.

3.4 Ownership of Materials

All materials submitted in response to this RFP become the property of NDB. Proposals and supporting materials will not be returned to vendors.

3.5 Proposal Costs

NDB is not responsible for any costs incurred by the vendor in the preparation of the proposal or the site visit.

3.6 Proposal Format (if applicable)

NDB recommends that the proposal should contain two parts as follows. **The vendor may choose other format if you desire so.**

Volume 1 – Main Proposal

       Section 1   Executive Summary

       Section 2   Functional Section

       Section 3   Technical Section

Section 4   Project Management Section

Section 5   Support Section

The above format is only a recommendation. Suppliers could use other formats if you desire so.

Volume 2 – Price Proposal – Should be separate but integral part of the proposal. The currency is USD; if quoting in other currencies, the exchange rate should be clearly defined. **The price shall be inclusive of applicable taxes (if not, please specify)**; and other charges shall also be clearly defined. Note: The payment will be done by international wire transfer, then NDB recommends that the tax fee must be included in the proposal, with respective details. Payment terms applicable - **not less than 30 days.**

3.7 Validity Period

The proposal including pricing quotation shall be valid at least for 120 days.

3.8 RFP Amendments

New Development Bank reserves the right to amend this RFP any time prior to the closing date. Amendments will be issued only to vendors who are going to complete a proposal.

3.9 Sub-contractor

NDB expects to negotiate and sign contract with one winning vendor. NDB will accept only complete solutions from a primary vendor, and will not accept any proposals that are on only one item or a combination of items from the RFP. The prime vendor will be responsible for the management of all subcontractors. NDB will not accept any invoices from subcontractors or become part of any negotiations between a prime vendor and a subcontractor.

3.10 Award Notification

NDB could negotiate with all shortlisted suppliers before deciding the winning vendor. And NDB reserves the right to negotiate further with the winning supplier before and in the contracting process. The remaining vendors will be notified in writing of their selection status.

4. Evaluation Criteria

The proposals will be reviewed and evaluated by NDB's team in accordance with the related policy and guidelines, especially the six principles (Economy, Efficiency, Competition, Transparency, Value for Money, Fit for Purpose) contained in NDB's corporate procurement policy. NDB is interested in obtaining a complete solution to the requirements contained in this RFP. Proposals that meet the proposal instructions and requirements will be given a thorough and objective review. Proposals that are late, or do not comply with proposal instructions, or take exceptions to mandatory requirements will be eliminated without further consideration. The following are the key factors that would be taken into consideration for evaluating the proposals.

i. Technical Approach and Methodology or Software Solution

Primary consideration will be given to meet the mandatory requirements as listed in this RFP.

The following are factors in the evaluation.

1. Meeting the requirements as stated in this RFP;
2. Understanding of the work to be performed;
3. Technical approach and methodology to accomplish the work;
4. Completeness and competence in addressing the scope of work.

ii. Project Management

NDB also believes that effective project management is essential for a successful implementation. Vendors will be evaluated on the completeness and responsiveness of their project management plans and the project team assigned.

As part of the project management plan, vendors must demonstrate adequate experience in developing and implementing the requested project. NDB's confidence in the vendors' ability to meet deadlines and successfully manage similar projects will be a primary consideration.

Special consideration is given to vendors who propose a detailed project plan with sufficient breakdown of tasks and steps to demonstrate a complete understanding of the project.

iii. Pricing

NDB will consider pricing as part of the evaluation criteria. **Lowest price is not essential to win**; however, large pricing differentials between vendors will be carefully examined. Price will be used as a final indicator for determining the vendor finalists when all other criteria have been normalized.

iv. Presentation and Demonstration

The results of Presentation and Demo will be evaluation factors.

v. Support and Maintenance

NDB believes the ability to perform timely support is also an important factor for the success of this project. Therefore, vendors should provide adequate information to demonstrate their capabilities to fulfill this task.

5. Contract
The participant shall review the service agreement template provided by NDB in advance. The use of NDB's version of the agreement is preferable. Template agreement and general terms and conditions can be found on the NDB's official web-site https://www.ndb.int/data-and-documents/corporate-procurements/

Attachment 1:

<p align="center">**Service scope**</p>

<p align="center">**Information Technology and Security Strategy Consultancy Service**</p>

Executive Summary
Project Description

This project is to request information technology and security strategy consultancy service to:

- Update the Information Technology and Security Strategy 2022-2026 document in accordance with NDB General Strategy.
- Provide assessment on current and future state vision, analysing the organization's technology and security infrastructure, processes, and capabilities.
- Define a clear mission, vision and objectives for Information Technology and Security.
- Define a high-level implementation prioritized roadmap with key initiatives, and milestones that would realize the strategy.

Functional Requirements

FR1. General requirement to the solution provider team

- Expertise and Experience: The consulting team should have strong background and extensive experience, particularly in the financial sector and MDB (Multilateral Development Banks) communities, in Information Technology and Security strategy, technology, operation and service, and deep knowledge of industry best practices, frameworks (such as ITIL, COBIT), and regulatory requirements related to IT management and governance. The consultant team should also demonstrate and apply a clear globalized and state-of-art perspective about technology trend and service adoptions.

- Relevant Skills and Certifications: The consulting team should have a team of consultants with the necessary skills and certifications. This may include certifications such as ITIL Foundation, COBIT, PMP (Project Management Professional), or CISA (Certified Information Systems Auditor). Ensure that the team has expertise in areas such as IT strategy, IT service management, IT governance, risk management, and compliance.

- Understanding of Organizational Context: The consulting team should demonstrate a strong understanding of NDB's organization, industry, size, complexity, and specific IT management and governance challenges. They should be able to align the recommendations and solutions with NDB's context and strategic objectives.

- Methodology and Approach: The consulting team should have a structured and proven approach for conducting assessments, developing policies and frameworks, and implementing governance structures. This ensures a systematic and effective engagement.

- Collaboration and Communication: The consulting team should demonstrate excellent communication skills, actively listen to NDB's needs and requirements, and foster collaborative working relationships with project stakeholders. It is imperative to understand the organization objectives and requirements with interviews, surveys and other data collection methods with the management and related business units of the Bank. It is required for the consulting team to support in communication in the review and revision of the strategy and road map document and the process to obtain approval from the Board.

- Tailored Solutions: Look for a consulting team that can provide tailored solutions to meet your specific needs. They should be able to customize policies, frameworks, and governance structures to align with NDB's culture, processes, and industry regulations.

- Project Management and Timelines: The consulting team should have a track record of delivering projects on time and within budget, proven project management methodologies, deliverable milestones, and reporting mechanisms to ensure effective project oversight and transparency.

- References and Reputation: The consulting team should have high reputation in the industry with testimonials, case studies, or client success stories that demonstrate their ability to deliver value and achieve desired outcomes.

FR2. Deliverable 1: general requirements to the information technology and security strategy

- The strategy should provide introductory context in line with NDB's business goals, strategy, policies, guidelines, and information collected from business units and the management.
- The strategy should include Information Technology and Security domains.
- The strategy should consider NDB's context, policies, guidelines, strategy, previous assessments, and information collected from business units and the management on the analysis.
- The strategy should describe the methodology used to create it.
- The strategy should describe its principles and/or pillars and/or imperatives and/or values that supports and guides the IT strategy.
- The strategy should provide an assessment analysis of the current and future state of the technology.
- The assessment should contain gap analysis, strengths, weakness, opportunities, and threats.
- The assessment should provide key success factors analysis.
- The strategy should provide an industry analysis and position NDB with the benchmark of other established financial institutions and MDBs.
- The strategy should provide Information Technology and Security industry trend analysis.
- The strategy should provide clear vision, mission, objectives to reflect the most optimal and practical targets and approaches for the technology unit with principles/pillars/imperatives to support it.
- The strategy should only contain SMART objectives (Specific, Measurable, Achievable, Relevant, and Time-bound).
- The strategy should describe the core Information Technology and Security capabilities required to deliver it.

FR3. Deliverable 2: general requirements to the information technology and security roadmap

- The roadmap should consider all data from Deliverable 1 as input.
- The roadmap should include Information Technology and Security.
- The roadmap should describe its methodology to identify and prioritize initiatives and projects based at least on impact, importance.
- The roadmap should contain a prioritized list with specific technology projects and initiatives to support the future state vision and achieve the business goals.
- The roadmap should include milestones, risks, resources, and estimated timeline to deliver them.
- The roadmap should consider its dependencies and potential impact.
- The roadmap should describe a governance process including KPIs to manage their risks and monitor progress.
- The governance process should include a visual tool (e.g., PPT slide) used to monitor and report progress per objective.
- The governance process should define clear roles and responsibilities of key stakeholders involved in implementing the IT strategy.

FR4.	Deliverable 3: general requirements for the visual one-page Information Technology and Security strategy

- The one-page Information Technology and Security strategy is high-quality visual tool to aid communication of the strategy.
- The one-page should contain mission, vision, objectives, principles, business drivers, core IT capabilities aligned with NDB General Strategy

Non-Functional Requirements

NF1.	Location

Details   Service resource to work with NDB HQ staff. (Shanghai, China)

NF2.	Language

Details   English is mandatory as the medium of communication and documentation

NF3.	Deliverables Format

Details   Deliverables 1, 2 and 3 should be delivered in Microsoft Word and Adobe PDF formats in narrative format, following our policies and guidelines.

Deliverables 1, 2 and 3 should also be compiled in a high-quality visual slide deck in PowerPoint format.

NF4.	Price proposal

Details   The participant should provide capped fee for overall engagement.

The Participant should also provide detailed cost structure breakdown with indication of each deliverables cost, resources needed to be involved, hourly rates of the resources etc.

NF5.	Payment terms

Details   Payment terms 30 days.

Advance payment is not acceptable.

Progress payment is possible.