GOVERNMENT OF PAKISTAN
PLANNING COMMISSION
MINISTRY OF PLANNING, DEVELOPMENT AND SPECIAL INITIATIVES
(PROJECTS WING)
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EXTENSION OF TIME/CORRIGENDUM

PRE-QUALIFICATION OF MONITORING & EVALUATION FIRMS FOR THIRD PARTY MONITORING /INSPECTION OF MEGA PSDP PROJECTS

Reference publication in the print media No. PID (1)3075/22 dated 16th November, 2022. The closing date for the receiving the bids from the prospective bidders has been extended upto 28th November, 2022. The ToRS and eligibility criteria have been updated/amended for attracting more potential; bidders.

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GOVERNMENT OF PAKISTAN
PLANNING COMMISSION
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TERMS OF REFERENCE FOR…PRE-QUALIFICATION OF M&E FIRMS FOR THIRD PARTY INSPECTION OF MEGA PSDP PROJECTS

Public Sector Development Program (PSDP) reflecting development priority of Government of Pakistan is implemented by the Federal Ministries/Division/ autonomous organizations and Provincial/Area Governments. PSDP 2022-23 comprises of 395 mega projects, out of which 17 projects are costing above Rs. 100 billion, 145 above Rs. 10 billion and 233 above Rs. 2 billion. It has been observed that around 50-60% development projects are facing time and cost overrun leading to delay in achieving the desired objectives as per approved PC-I. The delay in project implementation ranges between 2 -20 years.

Monitoring of development projects is a regular function of the Ministry of Planning, Development and Special Initiatives under S. No 30 (2&3) of Schedule-II of the Rules of Business 1973. The Prime Minister of Pakistan while visualizing the increase in cost and delay in benefits, has directed the Ministry of Planning, Development & Special Initiatives, to undertake Third Party monitoring/ Inspection of all mega PSDP projects to mitigate the risk of time and cost overrun.

ABSTRACT

The Expression of Interest (EoI) is meant to pre-qualify – based on a pre-defined criterion – a list of M&E firms which could be contracted immediately for specialized M&E tasks, mainly (i) third party Inspection/monitoring; and (ii) external evaluations. Through this advertisement, the Planning Commission of Pakistan will (i) establish a pool of pre-qualified firms; (ii) invite them for TPM/I of selected projects, by issuing task-based ToRs; (iii) award contracts to selected firms pre-qualified for the given sector and competitiveness of their technical & financial proposals; and iv) commission M&E tasks.

The ToRs for the M&E Consultants include projects background, objective, scope of work, capital cost along with its phasing, annual work/cash plan, activity-wise physical & financial progress, quality tests of completed works, identify deviations & violations, implementation issues and way forward for corrective measures, risk mitigation of time & cost overrun.

MINISTRY OF PLANNING, DEVELOPMENT AND SPECIAL INITIATIVES

The Planning Commission (denoted as PC) is a financial and public policy development institution of the Government of Pakistan. The Planning Commission undertakes research studies and state policy development initiatives for the growth of national economy and the expansion of the public and state infrastructure of the country in tandem with the Ministry of Finance (MoF). Since 1952, the commission have had a major influence and role in formulating the highly centralized and planned five-year plans for the national economy, for most of the 20th century in Pakistan. Although the five-year plans were replaced by Medium Term Development Framework (MTDF), the commission still played an influential and central role in the development of the programme. Furthermore, the Public Sector Development Programmes (PSDP) also placed under the domain of the Planning Commission. The commission's authoritative figures includes a Chairman who is the Prime Minister, assisted by the Deputy Chairman, Planning Commission.

Some of the key planning documents produced and managed by the Planning Commission are:

- Vision 2025 Pakistan
- Public Sector Development Programme (Annual Development Programme, with projects and budget allocations by Ministry/ Division)
- Medium-term Development Framework (3 year rolling development programme)
- Manual for Development projects

PUBLIC SECTOR DEVELOPMENT PROGRAMME (PSDP)

The Public Sector Development Programme (PSDP) is an important document – developed annually and as part of the budget – that reflects the public sector investments on development programmes and projects prepared by the Federal Government and its Ministries/Division. The PSDP is designed to prioritize sectoral investment to accelerate economic growth, reduce regional disparity, uplift of the backward areas, employment generation, human resource development, food security, and enabling environment for private sector investments. The PSDP also includes projects co-financed by the Federal and Provincial governments.

PSDP 2022-23 includes 1219 projects with a financial outlay of Rs. 800 billion to be implemented by the Federal ministries/Divisions and autonomous organizations. The projects fall in the following sectors:

a. **INFRASTRUCTURE DEVELOPMENT:** construction of dams for water storage and power generation, railways, bridges, roads, highways & motorways, airports, energy, housing/buildings and special development packages etc.
b. **SOCIAL SECTOR:** public health/ health, education, social protection, labor & manpower, sustainable development goals, youth programmes, climate change, green Pakistan etc.
c. **PRODUCTION SECTOR:** manufacturing, agriculture and minerals.

MONITORING & EVALUATION FRAME-WORK

i. Execution of development projects as per approved capital cost, scope of work and implementation period/Annual Work/Cash Plan.
ii. Procurement of goods & services as per PPRA Rules to ensure transparency.
iii. Develop database of development projects for analysis, periodical review, sectoral

performance and policy decisions to accelerate project implementation.

iv. Develop linkage between physical achievements and financial utilization of development initiatives.

v. Identify bottlenecks/problems being faced by the executing agencies in implementation of projects.

vi. Develop Result-Based Monitoring (RBM) indicators and ensure sustainability of investment.

vii. Promote timely execution, financial management and observance of rules & regulations during implementation of development projects.

PROJECT CYCLE MANAGEMENT: DEVELOPMENT PROFORMAE

PC-I PROFORMA (PROJECT PREPARATION)

- Production Sectors
- Infrastructure Sectors
- Production Sectors

PC-II PROFORMA (PROJECT PREPARATION)

- Survey & Feasibility Study

PC-III PROFORMA (MONITORING)

- Progress Reporting (Annual Targets & Physical Progress)

PC-IV PROFORMA (EVALUATION)

- Project Completion

PC-V PROFORMA (IMPACT EVALUATION)

- Project Evaluation after Completion of Project

M&E SYSTEM OF PLANNING COMMISSION

MONITORING

i. Digitalization of PC-Is receipt for consideration and approval of CDWP/ECNEC

ii. Develop PSDP financed projects key statistics on Management Information System (MIS)

iii. Desk-based monitoring: periodical update of physical and financial progress

iv. Generate monitoring reports based on MIS data

v. On Site/Field monitoring: verification of qualitative & quantitative physical progress against projects / annual work plan targets

vi. Third-Party verification to validate the physical and financial progress

EVALUATION

i. Mid-term evaluation of selected projects through mix-method approach to assess the efficiency and effectiveness towards outputs/outcomes of the projects.

ii. End-term evaluation of selected completed projects

iii. Impact evaluation of selected projects to define a roadmap for future investments.

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PURPOSE

i. To identify, prelist and engage M&E firms for Inspection /monitoring and evaluation of selected PSDP projects. Specifically, the Planning Commission intends to engage services of external firms, having specialization in M&E and related sectoral and geographical experience to undertake M&E of selected PSDP projects on behalf of the Commission.

The objective is to:

ii. Engage professional/ specialized firms with experience, capability and expertise in undertaking M&E of large scale, complex and multidisciplinary projects; and

iii. Brining in external, expert's perspective on delivery, efficiency, effectiveness, impact and sustainability of PSDP funded projects.

SCOPE OF WORK:

Since the PSDP for 2022-23 has 1219 projects, with an outlay of Rs. 800 billion, spanning across various geographical areas and sectors, the scope of M&E tasks is narrowed to following ;

i. **TECHNICAL FOCUS:** external firms would be around (i) third-party Monitoring/ Inspection of selected projects, through task-based ToRs; and (ii) formative, summative and impact evaluation of selected projects as identified by the Planning Commission, through task-based ToRs

ii. **THEMATIC OR SECTOR FOCUS** of assigned M&E tasks would be around multiple sectors such as infrastructure, social, and productive sectors.

iii. **GEOGRAPHICAL FOCUS** of the assigned M&E tasks would be around provinces, regions and districts of Pakistan.

THE M&E TASKS WOULD REQUIRE THE FOLLOWING SUB-TASKS FROM SELECTED FIRMS

i. Inception report, defining the objectives, scope, methodology, sampling, data collection tools, data analysis approach, field plan, outline of the M&E report, and overall timelines of the M&E task.

ii. Data collection, both primary and the secondary data, wherever required; quantitative and qualitative, using data collection tools and formats as agreed/ approved in the inception report.

iii. Analysis and presentation of findings to the PC/ M&E focal persons and other staff as PC would deem appropriate.

iv. Development of a draft report, as per TORs and the outlines approved in the inception report.
v. Receiving and incorporating Planning Commission feedback and comments in the draft report
vi. Finalizing and submitting the report, written in English, formatted and copy-edited.

KEY CONSIDERATIONS FOR PRE-QUALIFIED M&E FIRMS

Planning Commission is inviting an expression of interest (EoI) from all interested firms, meeting the eligibility criteria, for acquiring of M&E services. There is no limit on numbers of pre-qualified firms, as the M&E tasks are enormous and require range of firms with M&E expertise to deliver the function. Also, the Planning Commission understands that considering the number of projects which need to be monitored and evaluated, the diversity in projects' sectors, and the geographical spread; therefore, a pool of firms would resolve the challenge of finding appropriate firms for the M&E task.

The general qualification for eligible firms for prelisting would be as follows:

i. At least 10 years extensive experience of designing, managing and delivering M&E assignments, particularly Third-Party Monitoring/ Inspection and external evaluations.
ii. Specialized data management, collection, analysis, interpretation and presentation skill
iii. Must have a qualified and experienced team of M&E, with the background of IT, Statistics/Econometrics and Engineering professionals and other subjects relevant to the given sectors (CVs of the team must be made part of the bid).
iv. Demonstrated experience in use of technology and advance statistical software for data collection, analysis and presentation
v. Sectoral experience, with specialization in one or more preferential areas of Planning Commission mentioned in the advertisement for PSDP projects
vi. Geographical experience, with existence and outreach in one or more geographical areas of the Planning Commission and around PSDP projects (Urban/ Rural; Districts, Regional, Provincial, or National)
vii. Firms must have demonstrated capacity/ capability of conducting such assignments in all Provinces, GB and AJK. (Evidence to be attached)
viii. Firms must have demonstrated capacity/capability of use of IT based M&E systems such as primavera and MS projects
ix. Clients' satisfaction Certificate must be made part of the bid.

PROCUREMENT PROCESS - PROCEDURES OF OPEN COMPETITIVE BIDDING (AS PER PPRA RULES)

Single stage – one envelope procedure will be followed for the pre-qualification of M&E firms. This means that each bid (submitted by interested firms) will comprise of one single envelope containing the technical proposal on below mentioned criterion. All bids received will be opened by the evaluation committee for review, approval and notification of pre-qualified firms.

S.NO	CRITERIA POINT	TOTAL SCORE	SCORING CRITERIA
1	**Relevant Experience present and past**	**50**	
	Relevant experience in designing, managing and delivering M&E assignments, particularly third-party inspection and external evaluations	20	Years of experience □ 10-years or more: 15-20 marks □ 5-9 years: 8-14 marks □ 4-years or less: 0-7 marks The certificate of satisfactory completion of past M&E projects (from clients) will be used for scoring.
	Experience of working with the Federal and/or provincial governments (in public sector, and related to planning, appraisal, implementation, and monitoring and evaluation of development projects)	10	Number of assignments □ 10 or more: 8-10 marks □ 6-9 assignments: 4-7 marks □ Less than 5: 0-3 marks The certificate of satisfactory completion of past M&E projects from relevant government department will be used to define scores within each range.
	Highly specialized data management, collection, analysis, interpretation and presentation skills	10	Certified software with subscription – list of software □ Statistical analysis (advance): 0-3 marks □ Descriptive analysis: 0-3 marks □ Qualitative analysis: 0-2 marks □ Interpretation/ Pres: 0-2 marks
	Sectoral experience, with specialization in one or more preferential areas of Planning Commission and around PSDP projects (Roads, water, power, education, Science & Technology, health, buildings, climate change)	10	Number of PSDP project sectors □ 3 or more sectors: 7-10 marks □ 2-3 sectors: 4-6 marks □ 1 sector: 0-3 marks
2	**Capabilitieswith respect to personnel, techn: & geographical coverage**	30	
	Core team of M&E and sectoral professional (current)	20	Team on payroll □ M&E professionals: 10 marks □ Sectoral experts: 5 marks □ Data analysts: 5 marks
	Geographical experience, with existence and outreach in one or more geographical	05	Presence in Pakistan's geographical area (direct/ firm's offices/ staff or through partners □ All four provinces: 5 marks

S. #	Criteria point	Total score	Scoring criteria
	areas of the PSDP projects		☐ One or more provinces: 2-4 marks ☐ Federal (only): 1-2 marks
	Clients Satisfaction	05	5 or more: 5 marks Less than 2: 3 marks
3	**Financial Position**	**10**	
	Annual turnover in PAK Rupees (last three years, verified from financial and audit reports)	5	Annual turnover in PAK Rupees (last three years, verified from financial and audit reports) ☐ PKR. 20 million or more: 5 marks ☐ PKR. 10-15 million: 3 marks ☐ PKR. 5 million or less: 1 marks
	Audited reports	5	Number of years for which audit reports are available ☐ 5 years: 5 marks ☐ 1-3 years: 3 marks
4	**Appropriate Managerial Capability**	**10**	
	Governance & management structure	5	Availability of system ☐ Yes: 5 marks ☐ No: 0 marks
	Financial and HR management system: 0-3 marks	5	Availability of system (manuals, software etc.) ☐ Yes: 5 marks ☐ No: 0 marks
	Total	**100**	

STEP-WISE PROCESS TO SELECT AND ENGAGE M&E FIRMS

STEP-1. DEVELOPED DATABASE FOR PRE-QUALIFIED FIRMS

Ministry of PD&SI Ministry of Planning, Development & Special Initiatives, based on the prescribed criteria will shortlisted consultancy firms for Monitoring & Evaluation / Inspection of PSDP projects. The selected firms will be notified of their selection for the M&E assignment. No formal contract will be signed at this stage. However, Planning Commission will select a pre-qualified firm for any Third-Party M&E / Inspection activity. In case of a written decline by the selected firm, the Planning Commission will contract others pre-qualified firm for the assigned task.

STEP-2. SHARING OF M&E TASK-BASED TORS (one or package of projects) with pre- qualified firms for technical and financial proposal. This will be issued internally among pre-qualified firms (based on their technical capability in terms human resource to be assigned for TPM/I, testing lab facility, geographical outreach, financial competitiveness and reasonability), and the most economical will be offered a task-based contract. The contracts will be deliverable based i.e. payments will be in tranches (on proportionate basis) and linked to key deliverables/outputs in the ToRs.

STEP-3. CLOSURE OF CONTRACT, with feedback and certificate on quality of TOR's delivery. These would be used to (i) provide appreciation certificates to firms exceeding expectations (against ToRs); (ii) constructive feedback to firms meeting or moderately meeting expectations (against ToRs); and (iii) warnings/ exclusions from per-qualified list of firms to those firms who fail to meet expectations.