

## **Invitation for Expression of Interest (IEOI) For the Selection of Individual Consultants**

February 1, 2019

### **Capacity Development Consultant, Equity Investments (Strategy, Policy and Budget Department, “SPB”)**

**Ref: AIIB-CP-IC-19020**

1. The Asian Infrastructure Investment Bank (AIIB, or the Bank) has approved an administrative budget for financing consulting services (the Services) to engage a *Capacity Development Consultant, Equity Investments* for the Strategy, Policy and Budget Department (SPB) during a period of twelve (12) months for 100 actual working days. The Terms of Reference (TOR) of the Services is in Appendix A. The Services will be provided by an individual consultant (the Consultant) who may be a self-employed professional or an employee of a consulting firm. AIIB will select and engage the Consultant in accordance with the AIIB Corporate Procurement Policy (the Policy).
2. AIIB now invites qualified candidates to submit an Expression of Interest (EOI) as a potential individual applicant for consideration. The EOI Form-Appendix B and a copy of your CV shall be incorporated into a single PDF document and submitted in the prescribed format provided in Appendix A.
3. The deadline for submission of responses is **February 12, 2018 (COB) 23:59 Beijing time**. Any response received after this date will **NOT** be accepted.
4. If you wish to submit an EOI, please complete the EOI Form in Appendix B and submit it by email to the following authorized representative of AIIB:

**Deo Delaney**  
**Procurement Specialist**  
**Facilities and Administration Services Department**  
**Asian Infrastructure Investment Bank**  
[individual.consultant@aiib.org](mailto:individual.consultant@aiib.org)

## Appendix A: Terms of Reference

### Capacity Development Consultant, Equity Investments (Strategy, Policy and Budget Department, “SPB”)

#### BACKGROUND

The Asian Infrastructure Investment Bank (AIIB) wishes to engage a **Capacity Development Consultant, Equity Investments (the “Consultant”)** for its Strategy, Policy and Budget Department on a short-term basis. The term has a maximum of 100 days and the Consultant will be asked to provide the services offsite with intermittent travels to AIIB’s Headquarter office in Beijing.

AIIB is now in the concluding stage of developing its *Strategy on Investing in Equity* (the “Strategy”). Further capacity building for equity investments is the central theme of the draft Strategy. The key deliverable for the **Capacity Development Consultant, Equity Investments** is to contribute to the preparation of the *Equity Investment Implementation Guidelines* that define internal capacity requirements for investments in equity funds, co-investment, and stand-alone direct equity investments. This will include review of background materials, sharing best practices, working effectively across relevant departments of the Bank, helping build necessary capacities across different areas and drafting the required documents. The role involves closely coordinating with the other members of the team who are also working on finalizing the draft Strategy.

#### FUNCTIONAL RESPONSIBILITIES

Under the overall supervision of the Principal Strategy Officer, **the Consultant** will have the following responsibilities:

- Assist the development of *Equity Investment Implementation Guidelines* in consistency with the draft Strategy and with other policies of the Bank;
- Work in coordination with the incumbent team responsible for drafting the Strategy;
- Closely interact with relevant departments and senior officials of the AIIB;
- Drafting documents, conducting research, sharing best practices, connecting teams with the relevant experts and deliver other supporting tasks as needed.

#### KEY DELIVERABLES

The key deliverable for the **Capacity Development Consultant, Equity Investments** is to contribute to the preparation of the *Equity Investment Implementation Guidelines* that define internal capacity requirements for investments in equity which would include;

- Methodologies for identification of high priority funds and subsectors, type of products, and key partners for co-investments and direct equity investments
- Set of structures and key terms of a typical investment fund

- Changes to the existing *Operational Policy of Financing*
- Job descriptions and training programs for equity
- An *Administrative Guidance on Investing in Equity*, that would *inter alia* cover:
  - due diligence
  - reporting formats and tables of contents for different types of equity investments
  - guidelines for fund Advisory Committees and Board of Directors
  - technical input for valuations, accounting, internal controls and key reporting concepts
  - terms to ensure key Bank policies are implemented
  - linking Bank's accounting systems and portfolio management systems
  - integrating equity products into the MIS
- Other input that would facilitate investment decisions and review of progress by the AIIB Management.

### **REQUIRED COMPETENCES and QUALIFICATIONS**

The successful candidate should demonstrate the following competencies;

- Adherence to the highest ethical and professional standards
- Judgment and leadership to execute diverse projects by balancing competing demands on time, cost, and quality.
- Ability to play different roles and propose constructive ways to keep the project moving forward
- Ability to work in cooperation and collaboration with different teams and build strong working relationships at all levels.
- Commitment to the mission and activities of the AIIB

The successful candidate should meet the following qualifications;

- Master's Degree in a discipline relevant to finance, or a comparable advanced degree.
- At least ten years of diverse experience in executing and managing equity investments in developing countries
- Strong and diverse experience on building the required supporting capacities for equity investments in institutions that follow best international financial and ESG standards
- Excellent verbal and written communications skills in English

### **ASSIGNMENT LOCATION**

The assignment is expected to be carried out offsite with estimated of three travels to the AIIB Headquarter in Beijing.

### **SERVICE PERIOD**

The assignment is for a maximum duration of **100 days** between **March 1, 2019 and December 31, 2019**.

## SUBMISSION PROCEDURE

The submission of qualified EOIs should meet the above deadline. The subject line of your email should read:

- **Capacity Development Consultant, Equity Investments: AIIB-CP-STC-19020**

The EOI Form- Appendix B and a copy of your CV shall be incorporated into a single PDF document and the file named in the following format:

- **Capacity Development Consultant, Equity Investments: AIIB-CP-STC-19020\_***Applicant Surname\_First Name*

## SELECTION

The qualified consultant will be selected in accordance with the bank's Corporate Procurement Policy using established criteria listed under this Terms of Reference. The Corporate Procurement Unit will be responsible for selecting, contacting and engaging the consultants of choice on behalf of AIIB.

Submissions not meeting these requirements will **NOT** be accepted.

### Evaluation Criteria

- Demonstrated competencies (30%)
- Relevant experience (50%)
- English proficiency and inter personal skills (20%)

**Rating Scale** (minimum passing mark is 75%):

Excellent: 90-100%

Good: 80-89%

Pass: 75-79%

Fail: 74% and below