

## **IFAD/2017/020/ITB**

### **Provision of Asset Liability Management Study for the After Service Medical Coverage Scheme Trust Fund**

The Treasury Services Division of the International Fund for Agricultural Development (IFAD) requires an **Asset Liability Management Study for the After Service Medical Coverage Scheme Trust Fund** to be performed by an external financial advisor every three years. This is as per the requirements of the IFAD After-Service Medical Coverage Scheme Trust Fund Investment Policy Statement approved by the Thirty-eighth Session of the Governing Council.

**INSTRUCTIONS ON HOW TO ACCESS ITB DOCUMENTS:** In order to have access to the Tender Documents, it is necessary to register in UNGM portal ([www.ungm.org](http://www.ungm.org)). **Please read the instructions that follow this page on how to register and have access to the tender documents.**

**CONDITIONS:** Commercial offer should be with prices quoted net of VAT. IFAD is exempt from payment of taxes, levies, duties, and thus prices must be quoted net of such taxes. The prices will remain fixed for the entire duration of the contract and its subsequent extensions, if applicable.

**DEADLINE:** Your proposal should be submitted through UNGM portal by 2 June, 2017, 15:00 CEST, Rome.

**REFERENCE CODE:** IFAD/2017/020/ITB

#### **CONTACTS:**

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# INSTRUCTIONS ON HOW TO ACCESS THE ITB/RFP DOCUMENTS

The IFAD e-tendering system, In-tend, is integrated with the United Nations Global Marketplace portal ([www.ungm.org](http://www.ungm.org)). Below some instructions on how to access the tender documentation.

## 1. REGISTRATION IN UNGM

To access the tender documents, you need to be fully registered in UNGM (Basic Level is sufficient).

The screenshot shows the 'UNG M – Start Registration' page. At the top, there is a navigation bar with the United Nations Global Marketplace logo and a row of small images. Below the navigation bar, the main content area is titled 'UNG M – Start Registration'. It contains two numbered instructions:

- 1-Click on "Register"
- 2- Click on "Continue to registration" button

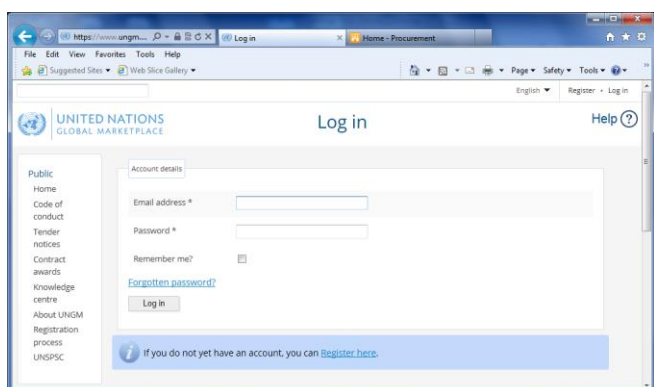
The first instruction points to a 'Register' button on a page that also displays the United Nations Global Marketplace logo. The second instruction points to a 'Continue to registration' button on a page that contains information about the registration process, including a link to 'Help?' and a 'Continue to registration' button. A red arrow indicates the flow from the 'Register' button to the 'Continue to registration' button.

- United Nations Global Marketplace • [www.ungm.org](http://www.ungm.org) -

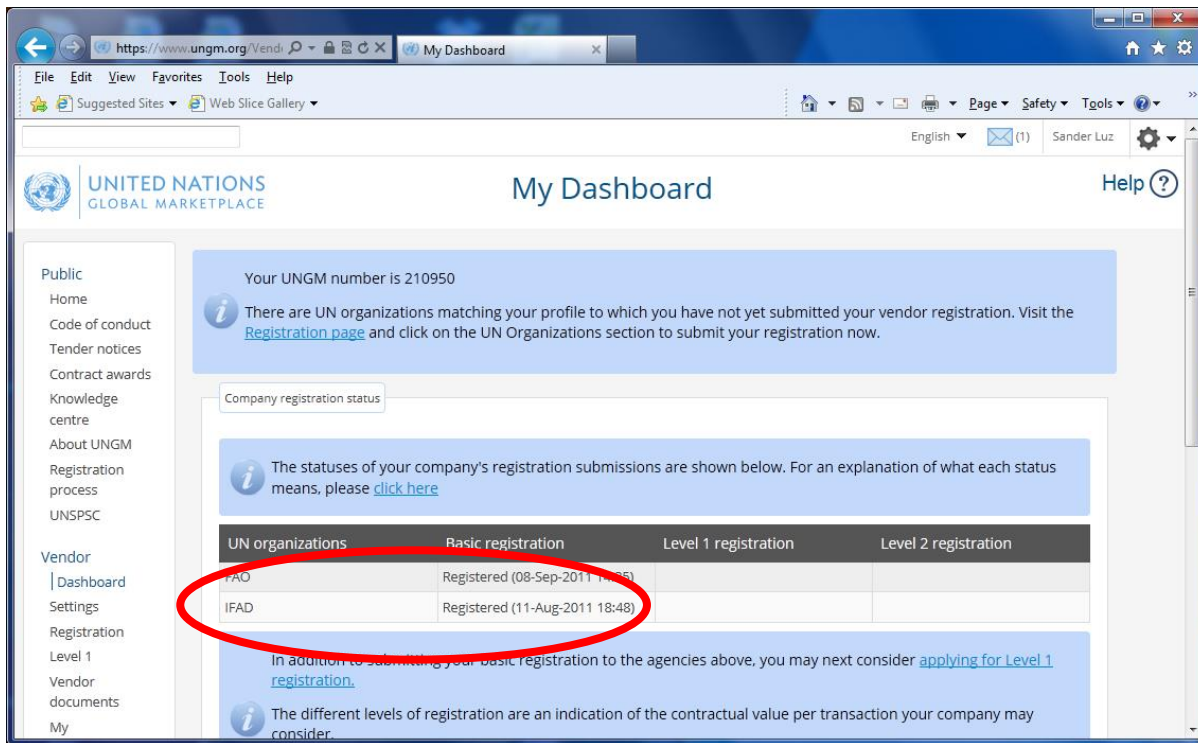
Follow the instructions and define your UNGM LOG-IN account (your e-mail) and password.

## 2. LOG-IN IN UNGM

Once the registration at Basic Level is complete, please log-in with your e-mail address and password

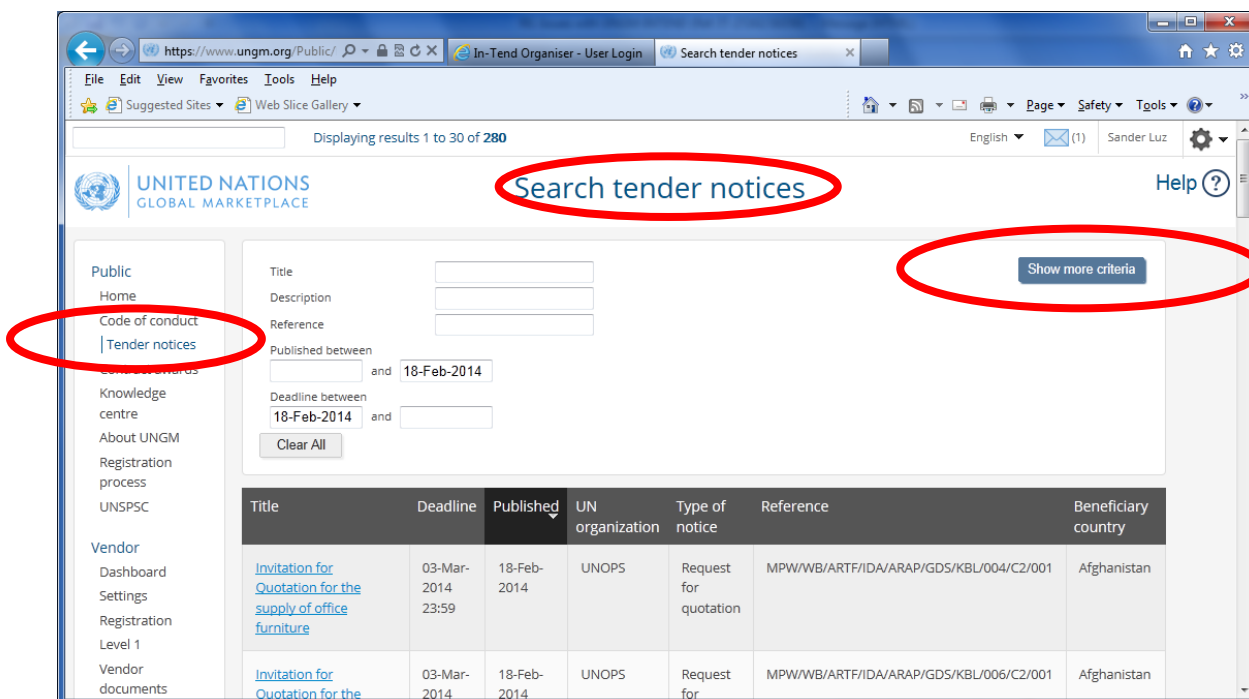


Please ensure that your BASIC REGISTRATION in UNGM with **IFAD** is complete. If not, please add the information requested by the UNGM system before proceeding.



### 3. SEARCH FOR THE TENDER NOTICE ISSUED BY IFAD

From the UNGM Home page, select BUSINESS OPPORTUNITIES, or from any other webpage, select TENDER NOTICES on the left-hand menu. Click on SHOW MORE CRITERIA on the upper right side.



In the “UN Organization” Field, type **IFAD** . The system will automatically show all the active tender notices issued by IFAD.

Displaying results 1 to 30 of 280

Search tender notices

Public

Home

Code of conduct

Tender notices

Contract awards

Knowledge centre

About UNGM

Registration process

UNSPSC

Vendor

Dashboard

Settings

Registration

Level 1

Vendor documents

Title

Description

Reference

Published between 18-Feb-2014 and 18-Feb-2014

Deadline between 18-Feb-2014 and 18-Feb-2014

Clear All

UN Organization IFAD

Country/area IFAD

UNSPSC Codes

Type

Not set Request for EOI Request for proposal Request for quotation Invitation to bid Request for pre-qualification Request for information

Hide advance criteria

Title	Deadline	Published	UN organization	Type of notice	Reference	Beneficiary country
<a href="#">Invitation for Quotation for the supply of office furniture</a>	03-Mar-2014 23:59	18-Feb-2014	UNOPS	Request for quotation	MPW/WB/ARTF/IDA/ARAP/GDS/KBL/004/C2/001	Afghanistan

On the right side of each line, you will see a green button with either “EXPRESS INTEREST” (if this is the first time) or “VIEW DOCUMENTS” .

In case of first access, click on “EXPRESS INTEREST” to notify IFAD that you are interested in participating in this Tender. After few seconds, the button will change in a green button “VIEW DOCUMENTS” .

Click on this VIEW DOCUMENTS button (on the left side) to have access to the tender documents.

Displaying results 1 to 15 of 19

Search tender notices

Public

Home

Code of conduct

Tender notices

Contract awards

Knowledge centre

About UNGM

Registration process

UNSPSC

Guidelines

Vendor

Dashboard

Settings

Registration

Level 1

Vendor documents

My tenders/contract

Tender Alert Service

Title

Description

Reference

Published between 26-Jun-2013 and 26-Jun-2014

Deadline between 26-Jun-2013 and 26-Jun-2014

Clear All

UN Organization IFAD

Country/area IFAD

UNSPSC Codes

Type

Not set Request for EOI Request for proposal Request for quotation Invitation to bid Request for pre-qualification Request for information

Hide advance criteria

Click Expression of interest button to view notice in intend

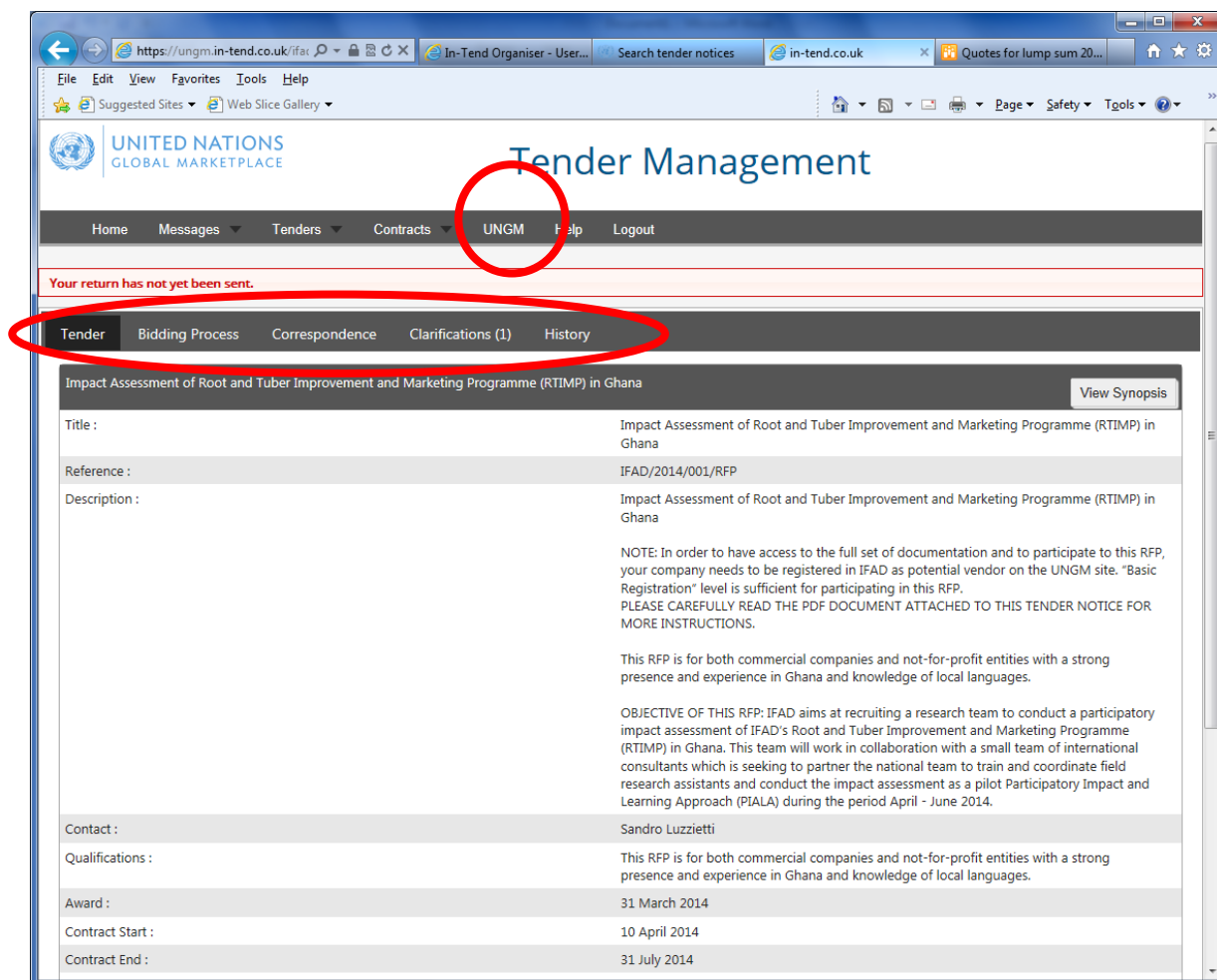
Title	Deadline	Published	UN organization	Type of notice	Reference	Beneficiary country
<a href="#">Financial Disclosure Programme</a>	16-Jun-2014 15:00	13-May-2014	IFAD	Request for proposal	IFAD/2014/006/RFP	Italy
<a href="#">Cisco Network Equipment and Trade-in of old Cisco switches</a>	04-Jun-2014 15:00	12-May-2014	IFAD	Invitation to bid	IFAD/2014/005/ITB	Italy
<a href="#">Market Research (Baseline Survey) on Usage of Rural Post Offices for Remittances in 11 African Countries</a>	10-Apr-2014 15:00	03-Apr-2014	IFAD	Request for proposal	IFAD/2014/004/RFP	Italy
<a href="#">Bolivia: Design and development of the baseline and impact assessment</a>	20-Mar-2014 15:00	17-Mar-2014	IFAD	Request for proposal	IFAD/2014/003/RFP	Bolivia
<a href="#">Nicaragua: baseline and impact assessment</a>	20-Mar-2014 15:00	13-Feb-2014	IFAD	Request for proposal	IFAD/2014/002/RFP	Nicaragua

## 4. TENDER MANAGEMENT

You will be transferred from the UNGM portal to the IFAD e-tendering system. The following “Tender Management” screen should appear.

At any time you will be able to return to UNGM by selecting the “UNG” tab on the upper menu.

**IMPORTANT:** If it does not show the Tender Management screen, please inform immediately IFAD ([procurementsection@ifad.org](mailto:procurementsection@ifad.org))



You are now in the IFAD e-tendering system. Under this area you have few menu tabs.

- **TENDER:** General information about this tender
- **BIDDING PROCESS:** IMPORTANT! here there is the **deadline** plus all the **documents of the tender process (RFP or ITB)**. In the same area, you have the placeholders for **uploading your proposal and all your documents**.
- **CORRESPONDENCE:** an area where you can write email and receive answers from IFAD
- **CLARIFICATIONS:** an area for reading the **clarifications issued by IFAD** and made available to all bidders. Please ensure to read all the clarifications as they become part of the specifications.
- **HISTORY:** a log of past activities related to this tender.

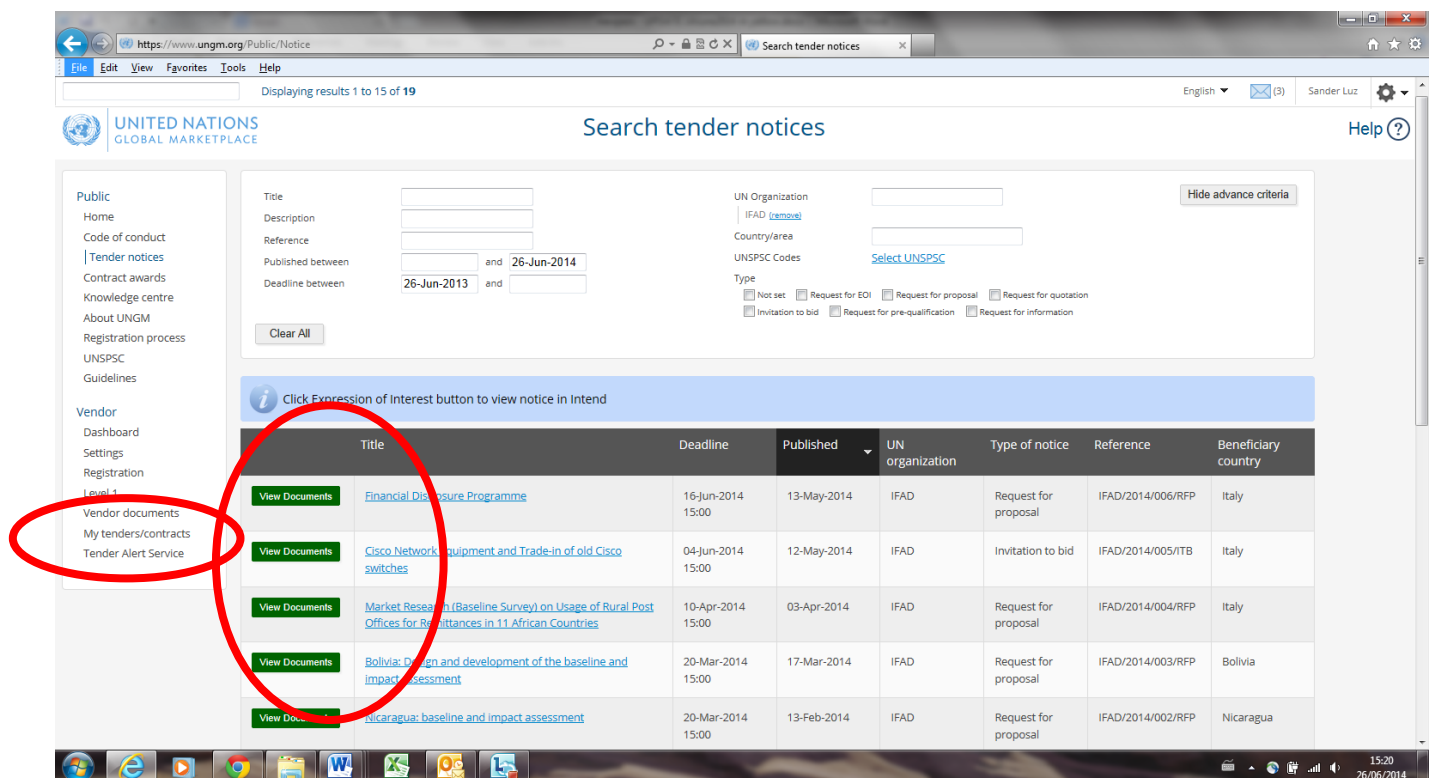
If you click on **UNG** in the upper menu, you can return to the UNGM home page

From this point onward, we think that the system is more intuitive and you will be able to navigate without major difficulties. But if you have questions, please contact us using the CORRESPONDENCE function of the e-tendering system or via email at [procurementsection@ifad.org](mailto:procurementsection@ifad.org).

## 5. IF YOU RE-ENTER UNGM AT A LATER STAGE

There is a short-cut to the tender notices.

After the LOGIN in UNGM, you can select the Menu option **MY TENDERS/CONTRACTS**, under the Vendor Menu on the left side of the UNGM main page. Again, click on **VIEW DOCUMENTS** to see the details of the Tender Notice and its document.

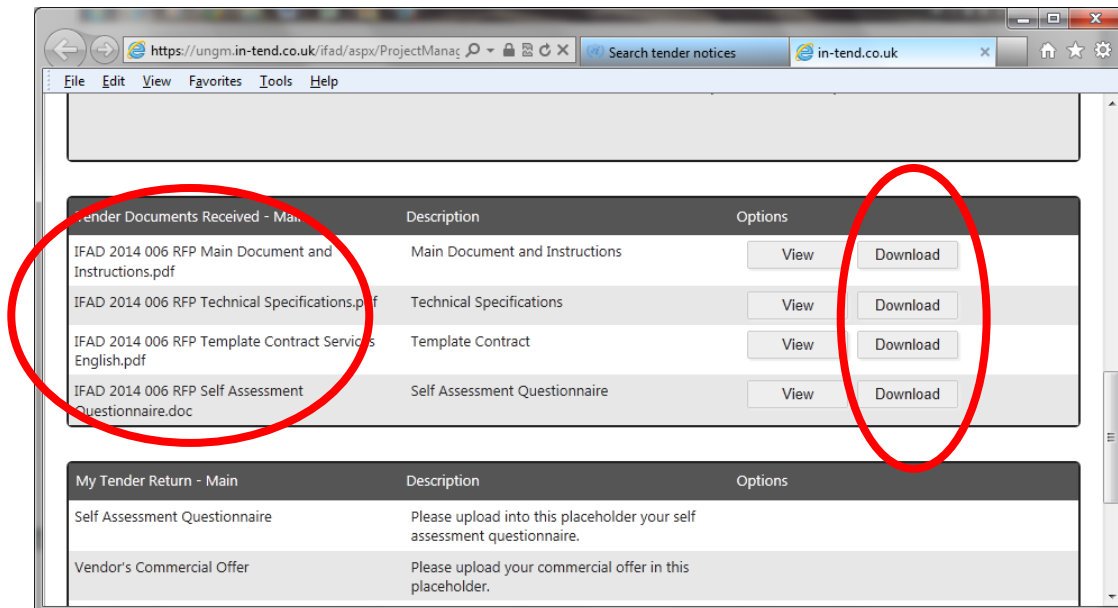


The screenshot shows the UNGM website interface. The left sidebar contains a menu with options like 'Public', 'Vendor', and 'My tenders/contracts'. The main content area is titled 'Search tender notices' and displays a table of tender notices. A red circle highlights the 'View Documents' button for the first tender notice, 'Financial Disclosure Programme'.

Title	Deadline	Published	UN organization	Type of notice	Reference	Beneficiary country
<a href="#">Financial Disclosure Programme</a>	16-Jun-2014 15:00	13-May-2014	IFAD	Request for proposal	IFAD/2014/006/RFP	Italy
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## 6. HOW TO DOWNLOAD THE TENDER DOCUMENTS

In the TENDER MANAGEMENT, select the BIDDING PROCESS menu tab, scroll down until the section TENDER DOCUMENTS RECEIVED, and download all documents.

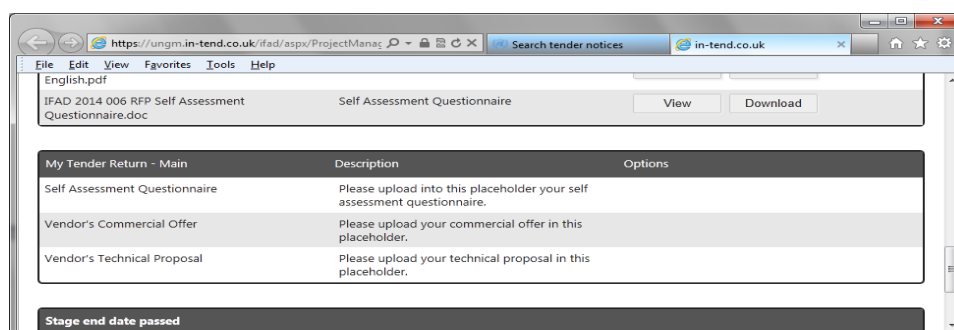


## 7. HOW TO ATTACH & SUBMIT DOCUMENTS

1. If any mandatory documents have been requested, they will be shown in the **MY TENDER RETURN** section against a Red button. You will need to attach them using the **Attach Documents** button within the My Tender Return section to the bottom of this screen.
2. If a Questionnaire is required to be completed, it will be shown in Red and marked Not Started in the My Tender Return section. It is mandatory that any Questionnaire's must be completed.
3. To attach additional documents you wish to submit as part of your tender return, click the Attach Documents button under the My Tender Return section (if available). These will then appear in the My Tender Return section.

NOTE : Large files may take some time to upload. We advise you to keep the files under 5MB.

4. **IMPORTANT** : When you have completed all the above steps and are ready to submit your tender return, click the red **Submit Return** at the bottom of this page.



## 8. IF YOU HAVE QUESTIONS

Please note that the UNGM system has been recently upgraded, and it may present some issues. We apologise for any inconvenience caused. In case, you can also contact directly via email or over the phone.

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