

Islamic Development Bank
Banque Islamique de Développement



البنك الإسلامي للتنمية

Request for Information

Request for Information (RFI) for:

Market Consultation and Interest Solicitation Regarding the:

Comprehensive and Independent Assessment of OMS System

Reference number: RFI/2026/001

Issue Date: 7 May 2026

Deadline: **Thursday, 21 May 2026, 11:00 PM (KSA time / GMT+3)**

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1. DISCLAIMER

This Request for Information does not create any representation, either express or implied, that:

- any tender or procurement process will proceed; or
- if a tender or procurement process does proceed, that the participant's tender or other form of application (if any) will be given any preference or special consideration.

Participants are still required to follow any tender or procurement process that may take place.

This Request for Information does not indicate a commitment to any particular course of action.

2. INTRODUCTION

1.1 Background

The Islamic Development Bank (IsDB) is preparing to launch a competitive selection process for a consulting assignment focused on a comprehensive assessment of its Operations Management Solution (OMS), the Bank's core business platform for managing the project lifecycle from its technical, functional and governance perspective.

This RFI is targeted at qualified firms with expertise in designing Enterprise level software architecture, Management Information Systems, Database solutions, and Operations Management systems. Full details of the assignment are provided in the attached Terms of Reference (**Annex A**).

1.2 Purpose

This RFI aims to collect input from the market to inform the Bank's upcoming procurement. Specifically, IsDB seeks feedback on:

- Feasibility and practicality of the TOR;
- Technical, costing, and logistical considerations;
- Indicative cost ranges and workstream structures;
- Suggestions for sequencing or alternative implementation approaches.

It also allows qualified firms to express their interest in being considered for the upcoming selection phase (see Section 6).

1.3 An Opportunity to Contribute and Shape

This RFI is an opportunity for qualified firms to help shape a strategically important assignment. Respondents may:

- Provide full or partial answers to the questions in Section 5;
- Offer feedback on the TOR via tracked changes or in-line comments;
- Express interest for the forthcoming procurement phase.

Participation is voluntary and does not impact eligibility in future processes.

1.4 Confidential

All responses will be treated as confidential and used solely for internal review and planning.

1.5 Contact Person

The Contact Person for this Request for Information is:

Name: Wahidullah Alokozay

Title: Corporate Procurement Officer

Address:

Telephone:

Email: walokozay@isdb.org

1.6 Lodgement

Responses must be submitted no later than:

Thursday, 21 May 2026, at 11:00 PM (KSA time / GMT+3)

Submit responses to: RFI Responses - RFI - OMS Assessment
e1fb2916.isdb.onmicrosoft.com@emea.teams.ms

Use subject line: “**RFI – OMS Assessment – [YourFirmName]**”

Ensure files are virus-checked before submission.

3. SCOPE

The scope of the assignment is detailed in the attached Terms of Reference (ToR). Respondents are encouraged to review the TOR (in Annex A) thoroughly before submitting feedback or expressions of interest.

4. INSTRUCTIONS FOR RESPONDENTS

Before responding to the questions in **Section 5**, please ensure that:

- You have reviewed the Terms of Reference (Annex A) in full
- Your organization’s name and contact details are clearly indicated
- If expressing interest (see Section 6), you have also completed the EOI Form (Annex C)
- Any proposed revisions to the TOR are provided using **track changes** in the Word version of **Annex A**.

You may respond using your own document format, as long as it follows the structure and numbering in **Section 5**. Partial responses are accepted.

You are encouraged to include:

- Comments or suggestions not explicitly covered in the questions
- Supporting materials such as case studies, capability statements, or team bios

Please ensure your submission is clear, well-structured, and complete.

5. RESPONSE SCHEDULE / SPECIFIC INFORMATION REQUESTED

A. Clarity of Scope and Feasibility

a. Assignment Scope and Structure

- i. Is it feasible to deliver all the objectives and scope of work in a single assignment, as currently designed?
- ii. Or would you recommend breaking it down into separate phases or contracts?

b. Information Gaps

- i. Are there any critical information gaps or missing inputs that would prevent you from preparing a sound technical and financial proposal? The standard response forms (technical and financial), used when submitting proposals at the RFP stage, are attached for reference (**Annex B**).
- ii. Are there any materials required as a pre-requisite from the IsDB for you to proceed with the submission of a proposal?

B. Timeline and Cost Considerations

a. Timeline Assessment

- i. Is the proposed duration of 4–5 months sufficient to achieve the assignment objectives?
- ii. If not, what scope of meaningful delivery could be completed by the deadline, assuming a start date of 1 June 2026?

b. Costing Confidence

- i. Given the complex nature of the assignment (technical, functional and governance) and the inclusion of travel, are you able to estimate costs with reasonable confidence at this stage?

c. Indicative Cost Ranges

- i. Without quoting exact prices, what would be a reasonable cost range for this type of assignment? (where possible, please indicate key cost drivers, level of efforts, team composition – remuneration breakdown, travel or other major cost components)
- ii. If possible, please share indicative cost ranges per section (technical, functional and governance related assessment).

C. Fieldwork and Logistics

a. Travel and On-Site Work

- i. Are you able to travel to one of the Regional Hubs (Almaty, Dakar, or Abuja) for the understanding the user experience issues phase?
- ii. Which city would you prefer to travel to, and why?
- iii. How much time would you propose to spend on-site?
- iv. Would you also recommend a checkpoint visit(s) to Headquarters (Jeddah) to help ensure successful delivery??
- v. Which institutions would you choose to perform the benchmarking, and why?

D. Technical Feedback on TOR

a. Track-Change Feedback on TOR

- i. If you have suggestions to improve the TOR, please provide comments directly in the attached Word document using track changes or in-line comments feature.

E. Delivery Experience and Capabilities

a. Relevant Experience

- i. Have you delivered similar assignments earlier?
- ii. If so, please provide brief examples or links to case studies (no marketing brochures, just relevant examples).

- iii. Have you worked with similar organizations like IsDB, or within the country or region?

F. Methodology and Tools

- i. Do you have any preferred agile methods or toolsets for delivering assignments of this nature?
- ii. Are there any collaboration platforms you recommend or prefer?

G. User Research Approach

a. User Engagement Strategy

- i. What is your preferred approach for user research in complex institutions with distributed teams (e.g., HQ + regional hubs)?
- ii. Do you recommend any methods we haven't included in the TOR?

H. Future-Proofing and Modularity

a. Flexibility

- i. Based on your experience, what architectural choices should we prioritize to make the system flexible in terms of adapting to the changing needs of the business?

6. ATTACHMENTS

- Annex A – Terms of Reference (TOR)

Annex A: Terms of Reference (TOR)

Terms of Reference (TOR)

TERMS OF REFERENCE (TOR)

Comprehensive and Independent Assessment of the Operations Management Solution (OMS) System

A. BACKGROUND AND CONTEXT

Institutional Overview and the Role of OMS

1. The Islamic Development Bank (IsDB) is a multilateral development bank with 57 member countries, headquartered in Jeddah, Saudi Arabia, and supported by a global network of Regional Hubs. It primarily provides project financing to clients in support of key sectors such as energy, transportation, education, health, agriculture, and water and sanitation across its member countries and Muslim communities worldwide. In addition to financing, IsDB also undertakes a range of non-financing activities, including technical assistance, capacity-building, knowledge-sharing, research and training.
2. To support the delivery of its core mandate in project financing, the IsDB relies on the Operations Management Solution (OMS), its principal digital business platform for managing the full project lifecycle, from planning and preparation to approval, implementation, and completion. OMS is a mission-critical platform, built on an SAP-based backend.
3. OMS serves as the central repository of the Bank's project and financing records, containing both structured data (e.g., project details, financial data, timelines) and unstructured data (e.g., reports, memos, and supporting documents). It provides a structured environment for staff across Headquarters and Regional Hubs to manage workflows, maintain institutional records, and support policy compliance and performance monitoring. As the Bank's primary system for managing its financing operations with clients, OMS plays a vital role in enhancing operational efficiency, transparency, and accountability.

Challenges and Strategic Priority

4. In 2024, an internal audit of the OMS highlighted serious concerns regarding the system's **agility** and **usability**. These findings aligned with repeated strategic and reputational concerns previously raised by IsDB Management about OMS at the Bank-wide level. The audit specifically pointed to limitations in user-friendliness, UI design, and operational efficiency, concluding that OMS had evolved into more of a compliance tool than a productivity enabler. These concerns were also echoed by the leadership of Regional Hubs, who represent the Bank's client-facing functions and serve as primary end-users of the system—particularly those engaged in field operations and direct delivery to clients.
5. The audit and subsequent feedback also highlighted fragmentation in how the project lifecycle is managed. While OMS is intended to be the central platform, several processes continue to operate outside it—handled manually or through parallel tools like Jira, Excel, or unit-specific applications.

This results in duplication, inefficiencies, and user frustration, especially when coordination is required across teams. Some internal stakeholders have opted out of using OMS due to its complexity. Improving usability could help rebuild trust in OMS and support the reintegration of these workflows into a single institutional system.

6. Given the above, the Vice President of Operations (VPO), as the relevant member of Management most directly impacted by OMS performance, has prioritized this as one of his top issues to be resolved during 2025-27. The VPO has tasked his Office to lead this effort, in close collaboration with the Information Management and Disruptive Technology Department (IMDT), i.e., the Bank's IT department, and other key stakeholders.
7. There are two key issues that need to be resolved as highlighted in the internal audit: agility and usability. The agility issue will require a comprehensive analysis of the situation involving a review of the entire system, governance, and other foundational components, hence will require a medium-to-long term plan. While usability will also be part of the longer-term agility improvements, there is an opportunity to address it more immediately. Therefore, tackling usability (UX, UI and Front-End) while maintaining the existing backend of the system was the first major milestone that was addressed by the end of 2025.
8. Beyond usability concerns, the audit report also recommends conducting a comprehensive and independent evaluation of the OMS system that encompasses functional, technical, and governance dimensions. Considering the rapid pace of technological advancement, the IsDB should carefully consider its IT strategy for the platform. This assessment should thoroughly examine the OMS from multiple perspectives and deliver actionable recommendations to senior management—specifically, whether to continue with incremental system enhancements or to migrate to a new platform altogether. The objective is to ensure that the OMS continues to meet the evolving and dynamic needs of the organization in a sustainable manner.

User Pain Points and Productivity Impact

9. Following the above, in April 2025, IsDB organized a “Pain Points” workshop with the main end-users of the OMS, consolidating over 80 issues that highlighted poor usability—characterized by unintuitive interfaces, cumbersome navigation, and fragmented workflows—as well as a rigid system architecture and unclear ownership, all of which were key factors undermining user efficiency, delaying internal processes, and ultimately affecting timely and effective delivery to clients.
10. It is estimated that the heaviest users—those responsible for data entry—spend up to one full day per week (20% of their time) feeding information into the OMS interface, reflecting a significant productivity and morale issue. These users are the Project Management Specialists (PMS) and Field Procurement Officers (FPO) who spend significant time entering and managing data. Other notable roles involving supervisory and oversight functions include Operations Team Leaders

(OTLs), Regional Procurement Officers (RPOs), and Country Operations Managers (COMs) are involved in OMS workflows.

11. The key affected user groups include: 41 Project Management Specialists (PMS) and 22 Field Procurement Officers (FPO).

Assignment Overview

12. The Operations Management Solution (OMS) assessment aims to conduct a comprehensive and independent evaluation of the current OMS environment in response to the challenges identified by the Internal Audit Department. These challenges have affected governance, adaptability, and the system's ability to meet evolving operational needs, with direct implications for efficiency, execution, and service delivery. The assessment will take stock of the existing system and determine the most appropriate way forward, whether through continued enhancement of the current solution or transition to a new platform suitable for the Bank operations.
13. The assignment will examine the OMS across technical, functional, and governance dimensions, including system architecture, process alignment, user adoption, institutional arrangements, and decision-making frameworks. It will identify gaps, inefficiencies, and risks influencing operational performance and assess how well the OMS supports current business processes and strategic objectives.
14. A key aspect of the assessment will be ensuring alignment with IsDB's broader institutional priorities, particularly the ongoing IsDB 10-year Strategy (10YS) Framework. The consultant will evaluate how the OMS and its supporting structures can be strengthened or restructured to support long-term operational efficiency and agility, while remaining responsive to changing business needs.
15. The expected output includes a Comprehensive Assessment Report, to be delivered by 31 October 2026, presenting clear findings, strategic options, and prioritized recommendations. This will be followed by an Implementation Plan and Transformation Roadmap by 31 November 2026, outlining phased actions, resource requirements, and governance arrangements for execution. The assignment is advisory in nature and will focus on analysis and recommendations rather than system redevelopment, requiring close collaboration with relevant IsDB stakeholders throughout the process.

B. OBJECTIVES

16. The objectives of this assignment are as follows:
 - a. **Diagnose Current System Challenges:** Determine the gaps in system governance, adaptability and alignment with the evolving business needs. The assessment should analyze the current system challenges primarily focusing on the issues highlighted by the

IAD report. This will help us identify the root causes for the system issues that have persisted since its implementation. This would reflect the current system limitations that are affecting the operational efficiency, execution and system delivery.

- b. **Evaluate Governance and Institutional Arrangements:** Propose a better governance model to ensure better accountability, agility and sustainability. This assessment will also look into the Governance structures and decision-making processes that are governing the OMS System. This would assess the roles and responsibilities of various stakeholders and business units in the Operations Complex and its partners.
- c. **Assess System Effectiveness and Agility:** Identify the technological, architectural and process constraints that are limiting agility of the system. The assessment would thoroughly review how the OMS System supports the operational workflows and data management. In addition, the study would also inform us how well the OMS System adapts to changing business and strategic requirements.
- d. **Reporting and Analytics:** The assessment shall review the current reporting and analytics capabilities supporting operational data within the OMS ecosystem. The review shall identify key limitations, inefficiencies, and structural constraints that hinder timely, accurate, and seamless reporting and analytics. Based on benchmarking against practices and solutions adopted by other Multilateral Development Banks (MDBs) and leading international financial institutions, the assessment shall propose an ideal future-state reporting and analytics model assisting in data-driven decision making.
- e. **User Engagement and System Adoption:** Provide a recommendation on improving the user ownership and system usability. This will be assessed from the levels of user engagement, system adoption and satisfaction. The assessment will also look at the user training and the change management processes that are currently in place to support the system acceptance.
- f. **Align OMS with Strategic and Institutional Objectives:** Provide a strategic roadmap for implementation of a new system or enhancement of the current system. The assessment will measure how well the OMS system aligns with the new strategy of the Bank and the institutional objectives and future plans.

C. SCOPE OF WORK AND RESPONSIBILITIES OF THE CONSULTING FIRM

17. The IsDB will designate a Task Team Lead (TTL) to lead and coordinate the project from IsDB and to act as the IsDB counterpart to the consulting firm.
18. The scope of the assessment comprises of three main aspects technical, functional and governance or institutional, which should be summarized into a comprehensive report. These aspects would together provide an overview on the current environment, its challenges and the strategic way of moving ahead. The consulting firm is expected to employ industry best practices

at every step. In addition, a set of foundational delivery requirements related to collaboration, handover, and sustainability apply across all workstreams to support effective execution and long-term maintainability.

Technical Review

19. Conduct a thorough assessment of the technology and infrastructure of the current OMS to diagnose scalability issues and pinpoint areas for improvement. Activities in this phase include:
 - a. Review the overall system architecture, including integration points with SAP and external systems.
 - b. Evaluate the data model of the system including data integrity, synchronization, and data management mechanisms.
 - c. Assess the level of customization of the OMS System in relation to key backbone platforms, including SAP, CML and other integrated systems. Identify and highlight customizations that pose significant risk by deviating from SAP industry best practices.
 - d. Assess the technology stack, performance, scalability, and maintainability. Identify technical limitations and legacy components constraining agility.
 - e. Review system security, access controls, and compliance with IT standards and policies.
 - f. Assess readiness for modernization and compatibility with the Bank's long-term IT strategy.
 - g. Assess the environment landscape (DEV, TEST, UAT, PROD), deployment processes, and CI/CD or release management practices to ensure controlled, consistent, and traceable system updates.
 - h. Review middleware and integration mechanisms (e.g., NetWeaver, APIs, ETL jobs), including error handling, message queues, retries, and overall interface robustness.
20. The technical review should provide the following insights into the Comprehensive Assessment Report
 - a. Technical Assessment detailing system performance, architecture, and scalability gaps.
 - b. Risk register outlining key technical, cybersecurity, and infrastructure risks.
 - c. Recommendations for modernization or re-platforming options.

Functional Review

21. Conduct an audit from the functional aspect to understand how well OMS supports the business operations and process efficiency. In addition, this study would also look into how well the system adapts to the evolving functional changes. Key tasks include:
- a. Review end-to-end business processes supported by the OMS and their integration with different systems.
 - b. Assess process efficiency, workflow automation, and alignment with operational requirements.
 - c. Evaluate functional coverage, including areas of duplication, redundancy, or manual intervention.
 - d. Analyse user experience, adoption levels, and overall satisfaction.
 - e. Review existing reporting, analytics, and performance monitoring capabilities.
 - f. Benchmark OMS functionality against leading MDBs.
22. The functional review should provide the following insights into the Comprehensive Assessment Report
- a. Functional Fit-Gap Analysis identifying strengths, limitations, and process bottlenecks.
 - b. User adoption and satisfaction summarizing key operational pain points.
 - c. Benchmarking matrix comparing current OMS features with modern, best-in-class systems.
 - d. Recommendations for functional enhancement or replacement priorities.

Governance and Institutional Review

23. This review shall assess the governance structures, institutional arrangements, and decision-making processes that influence the performance, sustainability, and adaptability of the OMS. Key tasks include:
- a. Review OMS governance framework, including ownership, accountability, and oversight mechanisms.
 - b. Evaluate coordination and communication between the Operations Complex, IMDT, SBCP, and other partners.
 - c. Assess existing change management, decision-making, and prioritization processes.
 - d. Review alignment between OMS governance and the Bank's broader institutional strategies and digital transformation roadmap.
 - e. Identify lessons learned from the evolution of the current OMS to inform future governance models.
24. This review should add the following findings to the Comprehensive Assessment Report.

- a. Governance and Institutional Assessment identifying gaps and systemic issues.
 - b. Recommended governance framework for OMS oversight and decision-making.
 - c. Definition of institutional roles and coordination mechanisms for future system management.
 - d. Contribution to the overall transformation roadmap to ensure institutional alignment.
25. At the conclusion of the assessment, key outputs will include a comprehensive report integrating technical, functional, and governance findings to provide an evidence-based analysis of OMS performance, along with a strategic recommendation for system enhancement or replacement. An implementation roadmap will also be delivered, outlining priority actions, timelines, required resources, and robust governance and monitoring mechanisms to guide operational and digital transformation and ensure effective execution and oversight.

Cross-Cutting Workstream: Collaboration, Handover, and Change Management

26. This assignment requires close collaboration with the organization's internal teams and a plan for sustainable handover:
- a. **Project Governance & Communication:** The consultant's project team will work under the guidance of the IsDB TTL. Regular check-ins are expected—daily, weekly, or monthly, as appropriate—to review milestones, risks, and decisions with key stakeholders. Agile ceremonies (sprint planning, demos, retrospectives) should involve the TTL or representatives to ensure transparency and alignment. These coordination mechanisms form part of the cross-cutting workstream on collaboration, handover, and sustainability, which supports all phases of the assignment.
 - b. **Cross-Functional Teamwork:** The consultant's team must work hand-in-hand with the IsDB's IT team. This cooperation is critical during system and process review. The consulting firm is expected to be proactive in knowledge sharing and receptive to input from the internal team, leveraging their institutional knowledge of the OMS's business logic.
 - c. **Internal Project Management & Team Coordination:** The consulting firm is expected to ensure strong internal coordination across its teams. Given the complexities of the activities, the firm must establish a clear internal project management structure that enables timely handoff of design deliverables, alignment on technical feasibility, and iterative feedback loops. Internal roles and responsibilities should be clearly defined, and the project manager or designated team leader must serve as the single point of coordination with the IsDB TTL to ensure coherence across workstreams.
 - d. **Handover & Capacity Building:** As the project concludes, a comprehensive handover will be done. This includes the transfer of all assets and documentation as specified in the deliverables.

27. The scope of the assignment will be limited to conducting a detailed assessment and submitting a comprehensive report and an implementation roadmap on the future of the OMS System that will enable the management to make an informed decision.

D. DELIVERABLES AND MILESTONES

28. The following are the key deliverables expected from this assignment, aligned with the main workstreams outlined in the Scope of Work (SoW). All deliverables should follow industry-standard formats and use tools that support collaborative review and feedback by the client.
- a. **Inception Report & Project Charter:** Delivered within the first 2 weeks, these brief outlines the proposed approach, team roles, sprint and milestone schedule, and roadmap for agile delivery. It also includes the consultants' plan to support the Scope of Work (SoW), including a light communication strategy to keep end users informed about overall progress, particularly on responses to OMS pain points raised during the workshop. Requires approval before moving forward.
 - b. **Current State Assessment Report:** This report provides an overview of the OMS architecture, detailing its core functionalities and its integration with different systems. It includes a comprehensive mapping of business processes, illustrating how the OMS supports operational execution across various workflows. The report also identifies key challenges, system limitations, and operational inefficiencies that impact performance. The report shall analyse the costs of OMS implementation, maintenance, and support to enable strategic decision-making in the Comprehensive Assessment. Additionally, it summarizes audit findings, highlights lessons learned and incorporates perspectives from stakeholders to inform future improvements.
 - c. **Comprehensive Assessment Report:** The Comprehensive Assessment Report serves as the core deliverable, providing an integrated, evidence-based evaluation of the OMS system across technical, functional, process, governance, and benchmarking areas. It systematically reviews architecture, performance, data flows, and security, analyzing scalability, modernization readiness, and compliance, while documenting legacy issues and technical debt with recommendations for improvement or migration. The report maps OMS functionalities to operational processes, identifying overlaps, gaps, and inefficiencies, and benchmarks against industry best practices to recommend process optimizations and usability enhancements. It assesses governance structures, accountability, and resource allocation, proposing a future framework to foster continuous improvement and institutional alignment. A benchmarking section compares OMS with market leaders and peer institutions, evaluating "Enhance versus Replace" scenarios, including cost, risk, value considerations and benefit realization. Ultimately, the report presents a holistic summary of the system's condition, strategic options, and a recommendation aligned with the Bank's

long-term objectives, with findings documented in industry-standard formats to support collaborative review and decision-making.

- d. **Implementation Plan and Transformation Roadmap:** This roadmap shall outline short, medium, and long-term actions to drive transformation, supported by resource and budget estimates for effective implementation including financial investment, staffing requirements, and skill needs. It will provide recommendations on a robust governance structure to ensure execution and monitoring, highlighting the initiatives that will deliver the greatest impact.
- e. **Management Briefing and Decision Support Materials:** This executive summary shall outline the key findings, strategic options, and recommendations, supported by an “Enhance vs. Replace” decision matrix that applies clear evaluation criteria. It will include concise briefing materials designed for presentation to key committees and stakeholders, ensuring informed decision-making and alignment with organizational priorities.

29. All major deliverables must be clearly documented, professionally presented, and supported by visual or explanatory materials, as appropriate. The consultant is expected to present key deliverables to the client at each stage to ensure clarity, validation, and alignment.

30. The consultant is expected to work closely with the designated IsDB team throughout the assignment to ensure ongoing alignment, co-creation of output, and internal capacity building. This collaborative approach aims to equip IsDB staff with the tools, methods, and practices used during the project, enabling them to sustain, adapt, and apply these approaches independently beyond the project’s conclusion. As part of this engagement, the consultant may also be requested to periodically present the project scope and progress to Bank management.

E. APPROACH AND METHODOLOGY REQUIREMENTS

31. The consultant’s proposal shall present a clear, structured, and evidence-based methodology that demonstrates how the OMS Assessment will be conducted in line with the Scope of Work and project objectives. The approach must ensure analytical rigor, institutional alignment, and practical applicability of recommendations. Key elements shall include:

- a. **Structured and Evidence-Based Assessment:** The methodology should be grounded in recognized best practices for enterprise system and institutional assessments, combining qualitative and quantitative techniques such as system reviews, process analysis, document review, and performance evaluation.
- b. **Stakeholder Engagement and Participatory Approach:** The proposal must outline how the consultant will engage key stakeholders, including business users, process owners, IT teams, and management, through interviews, workshops, surveys, and feedback sessions. Continuous collaboration and validation of findings will be essential.

- c. **Integrated Multi-Stream Analysis:** The methodology should clearly demonstrate how the assessment will be conducted across the three streams – Technical, Functional, and Governance & Institutional – and how findings will be consolidated to provide a holistic view and coherent recommendations.
 - d. **Benchmarking and Strategic Option Analysis:** The approach should include benchmarking against industry best practices and comparable institutions, as well as a structured evaluation of strategic options (enhance vs. replace), incorporating considerations of feasibility, risk, cost, and long-term alignment with IsDB’s strategic framework.
 - e. **Risk and Quality Management:** The consultant shall identify potential risks related to data access, stakeholder availability, system constraints, and timelines, and propose mitigation measures to ensure delivery quality and project continuity.
32. The proposal should clearly demonstrate how the proposed methodology will translate into tangible outputs, including the assessment report, strategic recommendations, and a practical implementation roadmap that supports informed decision-making and long-term sustainability.

F. DURATION OF ASSIGNMENT, TIMEFRAME, TIMELINE AND REPORTING

33. The assignment is expected to last approximately **4 to 5 months** from the date of contract signature, with all major deliverables to be completed no later than **31 November 2026**, unless otherwise agreed. The consultant is expected to commence immediately upon contract signing. The timeline reflects a multi-phase agile approach, beginning with current state assessment proceeding to comprehensive assessment and benchmarking, followed by a detailed transformation roadmap and presentation to the management.
34. The indicative timeline below outlines expected phases and deliverables. Consultants may refine this schedule in their proposals based on their team’s capacity and methodology:
- a. **Month 0 (Kickoff):**
Deliverables: Inception Report & Project Charter
 - b. **Month 1–2: Phase 1 – Current State Assessment**
Deliverables: Current State Assessment Report
 - c. **Month 2–3: Phase 2 – Comprehensive Assessment and Benchmarking**
Deliverables: Comprehensive Assessment and Recommendations Report
 - d. **Month 3–4: Phase 3 – OMS Transformation Roadmap Development**
Deliverables: Implementation Plan, OMS Transformation Roadmap Report
 - e. **Month 4+: Management Briefing**
Deliverables: Management Briefing and Decision Support Materials

35. The consultant will provide bi-weekly progress updates, participate in review meetings at key milestones, maintain an issue log and risk register for joint review, and be available to deliver periodic briefings to Bank management on the project’s objectives and progress, when requested.
36. All deliverables and communications must be in English. The consultant’s project manager will serve as the central point of contact and will coordinate across all workstreams to ensure timely and effective reporting.

G. QUALIFICATIONS AND REQUIRED CORE EXPERTISE

37. The consultant must provide a multidisciplinary team with strong capabilities covering the full delivery lifecycle from user research and pain point analysis to design systems and front-end implementation. The team should bring a proven track record delivering enterprise-grade, internal-facing platforms—such as ERP systems, project workflow tools, or similarly complex environments—with an emphasis on usability, operational efficiency, and maintainability.
38. Beyond technical proficiency, the consultant is expected to engage as a strategic thought partner—bringing in global best practices while constructively challenging existing assumptions and guiding stakeholders toward effective, user-centric solutions. The team must be confident working in agile sprints, facilitating iterative feedback with diverse user groups, and balancing practical constraints with forward-looking design choices aligned to institutional goals.
39. The following roles are indicative of the core expertise required. While titles, qualifications and responsibilities may vary, the consultant must clearly demonstrate how their team will collectively fulfill the objectives of this assignment.

Table: Detailed Qualifications and Expertise

Project Role	Experience	Education	Skills and other requirements
Team Lead / Senior Enterprise Expert	<p>12–15 years of relevant experience, including 8+ years leading system or operational assessments.</p> <p>Demonstrated experience with ERP/MIS reviews and IT governance assessments.</p> <p>• Strong leadership, stakeholder management, and synthesis/reporting skills.</p>	<p>Bachelor’s or Master’s in Information Systems, Engineering, Business Administration, or related field.</p>	<p>Strong leadership and coordination skills.</p> <p>Proven ability to synthesize multidisciplinary findings.</p> <p>Excellent communication, stakeholder engagement, and report-writing capabilities.</p> <p>Experience in similar institutional or development contexts.</p>

Project Role	Experience	Education	Skills and other requirements
Technical Systems Expert	<p>Minimum 10 years of experience in enterprise systems architecture and performance evaluation.</p> <ul style="list-style-type: none"> • Proven work on SAP-based or custom ERP/MIS platforms. • Experience with system modernization, integration, and cybersecurity. 	<p>Degree in Computer Science, Information Technology, or related discipline</p>	<p>Deep understanding of APIs, middleware, and data integration.</p> <p>Expertise in system scalability, cloud readiness, and IT governance standards.</p> <p>Strong analytical and diagnostic capabilities.</p>
Business Process and Functional Specialist	<p>At least 10 years of experience analyzing and improving operational workflows.</p> <ul style="list-style-type: none"> • Demonstrated work in ERP/MIS functional analysis and process automation. 	<p>Bachelor's in Business Administration, Operations Management, or Banking sector</p>	<p>Expertise in banking or finance sector preferably development sector.</p> <p>Strong analytical and documentation skills.</p> <p>Ability to perform fit-gap analysis and benchmark against best practices.</p>
Governance and Institutional Specialist	<p>Minimum 10 years in institutional assessment, governance review, or organizational design.</p> <ul style="list-style-type: none"> • Proven experience with IT governance or institutional reform initiatives. 	<p>Bachelor's in Public Administration, Management, or Organizational Development.</p>	<p>Strong understanding of decision-making, accountability, and oversight mechanisms.</p> <p>Excellent facilitation and stakeholder consultation skills.</p> <p>Familiarity with governance in multilateral or large institutional settings.</p>

Project Role	Experience	Education	Skills and other requirements
Financial Analyst	Minimum 8–10 years of professional experience in financial analysis for large-scale IT or enterprise system projects, including conducting Total Cost of Ownership (TCO), Cost-Benefit Analysis (CBA), and financial modeling to support strategic decision-making (e.g., enhance vs. replace options). Experience in multilateral development banks or complex institutional environments is desirable.	Degree in Finance, Accounting, Economics, Business Administration, or related field.	Strong expertise in financial modelling, ROI and lifecycle costing analysis; ability to assess implementation, maintenance, and support costs; proficiency in scenario analysis and investment appraisal; strong analytical, reporting, and presentation skills; familiarity with IT project costing and procurement processes.
Project Manager / Team Lead	8+ years managing digital or design–tech projects, with experience coordinating multi-disciplinary teams	Bachelor’s in business, tech, design, or related field	Serves as overall engagement lead Acts as the main interlocutor with the IsDB Task Team Leader (TTL) Skilled in project planning, stakeholder coordination, and delivery management Familiar with agile practices and adaptable to client processes Strong organizational and communication skills May be combined with another lead role

40. The consultant’s proposal should include CVs of the proposed team and case studies of relevant past projects demonstrating experience with enterprise systems. Experience with multilateral institutions, development finance organizations, or similarly complex operational environments will be viewed favorably.

H. EVALUATION AND MEASUREMENT OF SUCCESS

41. The success of this assignment will be assessed through a combination of delivery quality, measurable improvements in usability and productivity, and the quality of engagement with IsDB teams, as a key enabler of successful delivery and adoption. This includes proactive

coordination, openness to feedback, responsiveness to user needs, and meaningful knowledge transfer. The consultant will also support the client in defining a baseline and conducting a Productivity Impact Assessment, both before and after implementation, as part of the project scope.

42. Key indicators of success will be tied to a set of agreed-upon KPIs and targets established during the inception phase. These include:
- a. **Improved usability and user experience**, demonstrated through usability testing and user feedback (e.g., enhanced task intuitiveness, smoother navigation, and positive responses from key user groups such as PMSs, FPOs, OTLs, and COMs).
 - b. **Productivity gains**, such as reduced time spent on data entry and workflows, fewer user errors, and lower volume of support requests—measured against the established baseline.
 - c. **High system adoption and engagement**, including widespread use of the redesigned interface, low resistance to change, and observable improvements in user behavior.
 - d. **Quality and timely delivery of outputs**, with all deliverables meeting TOR specifications.
 - e. **Strong collaboration and knowledge handover**, demonstrated by regular and constructive engagement with the IsDB TTL and relevant teams, clear documentation of technical and design decisions, and sufficient capacity-building to ensure internal teams can sustain and extend the solution after the consultant's exit.
43. Final acceptance will be based on the delivery of all contracted outputs, including the productivity impact assessment, and reasonable evidence that the objectives defined in this TOR have been achieved.

I. ADDITIONAL NOTES - DATA, LOCAL SERVICES, PERSONNEL AND FACILITIES TO BE PROVIDED BY IsDB

44. **Institutional Support:** The IsDB will provide the necessary documents, access credentials (where applicable), and points of contact across relevant departments to support the consultant in completing the assignment. These may include internal workflows, OMS documentation, prior user feedback, analytics reports, and technical architecture diagrams.
45. **Confidentiality:** All information, data, documents, and design assets provided by IsDB or developed by the consulting firm during this engagement shall be treated as strictly confidential. No part of this information may be published or disclosed to any third party without prior written approval from IsDB.
46. **Ownership of Deliverables:** All plans, reports, photographs, designs, prototypes, code, and other documents produced as part of this assignment shall become and remain the exclusive property of IsDB. The firm shall submit all such deliverables, along with a complete inventory, by the

conclusion or early termination of the assignment. The firm may retain copies strictly for archival purposes and shall not reuse the outputs for unrelated engagements without written consent from IsDB.

47. **Travel for Field Mission:** Consultants must include in their financial proposals the cost for at least one field mission to a Regional Hub (Almaty [preferred], Abuja or Dakar), involving international travel. This mission is mandatory and is expected to take place early in the assignment.
48. **Data Security and Research Ethics:** The OMS contains sensitive operational and institutional data. The consultant must comply fully with IsDB's internal data protection and security protocols. Access to live production environments may be limited; anonymized or test datasets will be provided when necessary.
49. **Backend Constraints and Technical Feasibility:** Given that OMS is built on an SAP ECC backend, certain data structures, workflows, and business logic are immutable under this assignment. Coordination with IsDB's SAP technical team will be essential to clarify any limitations or required integration touchpoints.
50. **Intellectual Property (IP):** All work products delivered under this assignment—including source code, design files, documentation, and testing artifacts—shall be transferred in full to IsDB. The consultant may not repurpose, distribute, or commercially reuse any part of the deliverables without written authorization from IsDB.

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