

**REQUEST FOR EXPRESSIONS OF INTEREST**  
**CONSULTING SERVICES**  
**BANK-EXECUTED OPERATIONS**  
**FULL COMPETITIVE SELECTION PROCESS**

**PROJECT NAME:** Consultancy to Develop a Toolkit for Climate-Resilient Strategies for Water and Sanitation Management in Latin America and the Caribbean

**SELECTION PROCESS #:** B260190

**SELECTION METHOD:** Full Competitive

**COUNTRY:** Regional

**SECTOR OR DEPARTMENT:** INE/WSA

**TC NAME:** Toolkit for Climate-Resilient Strategies for Sustainable Water and Sanitation Management in the Caribbean

**FUNDING – TC #:** ATN/OC-21319-RG

**LINK TO TC DOCUMENT:** <https://www.iadb.org/en/project/RG-T4611>

**Attention Consulting Firms: Important Update Regarding BEO Bidder Portal Registration**

**All consulting firms**, both new and previously registered in the [BEO Portal](#), **must add their Business Partner Number (BP Number)** to their organization's profiles to participate or continue participating in a BEO procurement process.

Please refer to the [FAQs](#) in the Portal for more details on **"How to Find or Obtain Your BP Number"**.

**Avoid delays** by not waiting until the last moment to complete this update. This process may take up to **48 hours** to complete and could prevent your organization from participating in a BEO Process.

For further questions or assistance, use the [live chat](#) on the BEO Bidder Portal page or email us at [ocs.procurement@iadb.org](mailto:ocs.procurement@iadb.org)

The Inter-American Development Bank (the Bank) was established in December of 1959 to help accelerate economic and social development in Latin America and the Caribbean. Today, the Bank is a major catalyst in mobilizing resources for the region (For more information about the Bank, please refer to the Bank's website at [www.iadb.org](http://www.iadb.org).)

**Section 1. Purpose of this Request for Expression of Interest**

**1.1** The Bank is executing the above-mentioned project. The Bank intends to contract consulting services described in this Request for Expressions of Interest (REOI). The purpose of this REOI is to obtain sufficient information to enable the Bank to evaluate if the eligible consulting firms (CF) have the experience and qualifications relevant to provide the consulting services requested by the Bank.

**1.2** As defined in the Corporate [Procurement Policy \(GN-2303-33\)](#), participating CF must be from a Bank's Member Country<sup>1</sup> or Territory<sup>2</sup> to be eligible to submit an Expression of Interest (EOI). The Bank will conduct the shortlisting process of the CF that expressed interest. The shortlisted CF will then be invited to continue further in the procurement process.

**1.3** This REOI is not to be construed as either an RFP or an offer to contract and in no way obligates the Bank to contract anyone. The Bank reserves the right to reject any and all participating CF for any or no reason without having to provide an explanation. The Bank does not bind itself in any way to select any participating consulting firm. No debrief will be provided as to why CF have or have not been shortlisted.

## Section 2. Instructions to the eligible consulting firms

2.1 Expressions of interest must be delivered using the *Bidder Portal for the Selection and Contracting of Consulting Firms for Bank-Executed Operations* (the Portal) (<http://beo-procurement.iadb.org>) by: **16<sup>th</sup> October 2026** 5:00 P.M. (**Washington, D.C., Time**) in PDF format only (Max. 45MB).

2.2 To access the Portal, the CF must generate a registration account, including **all** the data requested by the Portal. In the event that any of the information requested is not included, the consulting firm will not be able to participate in this or any other Bank-executed selection process for operational work. If the consulting firm has been previously registered, please validate that you have **all** the consulting firm's information updated and complete before submitting an EOI.

2.3 Eligible CF may partner in the form of a Consortium/joint venture (JV) to enhance their qualifications. Such Consortium/JV shall appoint one of the CF as the representative responsible for the communications, the registration in the Portal, and the submission of the corresponding documents (Lead Firm). If submitting as a Consortium/JV, the proposed structure, as well as the Lead Firm, must be maintained if the Consortium/JV proceeds in this selection process.

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<sup>1</sup> **Member Countries:** Argentina, Austria, Bahamas, Barbados, Belgium, Belize, Bolivia, Brazil, Canada, Colombia, Costa Rica, Chile, Croatia, Denmark, Dominican Republic, Ecuador, El Salvador, Finland, France, Germany, Guatemala, Guyana, Haiti, Honduras, Israel, Italy, Jamaica, Japan, Mexico, Netherlands, Nicaragua, Norway, Panama, Paraguay, People's Republic of China, Peru, Portugal, Republic of Korea, Slovenia, Spain, Suriname, Sweden, Switzerland, Trinidad & Tobago, United Kingdom, United States, Uruguay and Venezuela.

<sup>2</sup> **Eligible Territories:** a) Guadeloupe, French Guiana, Martinique, Reunion – as Departments of France; b) U.S. Virgin Islands, Puerto Rico, Guam – as Territories of the USA; c) Aruba – as a constituent country of the Netherlands; and Bonaire, Curacao, Sint Maarten, Saba, St Eustatius – as Departments of the Netherlands; d) Hong Kong – as a Special Administrative Region of the People's Republic of China.



2.4 Interested CF may obtain further information during office hours, 09:00 AM to 05:00 PM (**Washington, D.C. Time**), by sending an email to: [Lucio Javier Garcia Merino LUCIOGA@iadb.org](mailto:LUCIOGA@iadb.org) |

### **Inter-American Development Bank**

Division: [INE/WSA](#)

Attn: [Lucio Javier Garcia Merino](#)

1300 New York Ave, NW

Washington DC, 20577

Tel:

E-mail: [LUCIOGA@iadb.org](mailto:LUCIOGA@iadb.org)

Web site: [www.iadb.org](http://www.iadb.org)

2.5 The Bank hereby invites eligible CF to indicate their interest in providing the services described below in the draft Terms of Reference for the consulting services. Interested CF must provide information establishing that they have the necessary experience and are qualified to perform the services. So that all responses may be properly evaluated, eligible CF must include in their submissions the information requested in the following section, with full and clear explanations.

### **Section 3. Consulting Services**

3.1 The consulting services include [the development of a toolkit for climate resiliency actions that covers, among others, circular economy, NRW reduction and renewable energy and energy efficiency (RE/EE) for carbon neutrality for LAC water and sanitation utilities. Close coordination with the IDB project team, participating utilities, and other relevant stakeholders will be required to achieve the proposed objective. The estimated duration is 12 months, with an estimated budget of USD 215.000.]

3.2 Although there is no standard format for presenting an Expression of Interest, eligible CF must submit an EOI containing the following information:

- 1) Basic Information—Provide the official name of CF, the contact's name, email address, phone numbers, and office address (es) of the key contact (s) responsible for the EOI.
- 2) Background—Provide a description of the CF. The CF may include brochures or documents that provide information about its organization, history, mission, structure, and number of staff.
- 3) Experience related to the requested consulting services—Provide all kinds of evidence the CF considers appropriate to show its experience and expertise in delivering services similar to those described in Annex A, Terms of Reference (e.g., brochures, reports, studies, description of similar assignments, references to cases in which it has provided similar services, experience in similar conditions, availability

of appropriate skills among staff, etc.)

3.3 Estimated budget: USD 215.000 (two hundred fifteen thousand United States dollars).

## **Annex A. Draft Terms of Reference**

Please note that the attached Terms of Reference may be subject to changes by the Bank. The CF that have been shortlisted will be notified of these changes.

### ***ANNEX A – Terms of reference***

#### **1. Background and Justification**

The IDB Water and Sanitation Division (INE/WSA) has approved a regional technical cooperation for enhancing the resilience and sustainability of water and sanitation services for Caribbean water utilities. The project '**Toolkit for Climate-Resilient Strategies for Sustainable Water and Sanitation Management in Latin America and the Caribbean (LAC)**' will be funded under the IDB Regional Public Goods initiative which promotes regional cooperation in LAC to address shared development challenges through collective action. The impact of climate change on water and sanitation services is an urgent development challenge common to Caribbean countries, among other countries. The sector is especially vulnerable to decreased availability of freshwater and increased risks of damage to infrastructure with extreme weather events. Further, the lack of action in watershed and source water protection, energy inefficiency in the provision of water and sanitation services, high levels of non-revenue water (NRW) and low uptake of resource recovery in wastewater treatment comprise missed opportunities for building the resilience of the sector to climate change. Given the scope of these challenges, there is a pressing need for a unified, regional response that equips utilities with the tools and knowledge to enhance resilience and sustainability.

The primary objective of this consultancy is to enhance the resilience and sustainability of water and sanitation services in LAC by developing and disseminating a comprehensive toolkit that enables water utilities to implement concrete actions to mitigate the impacts of climate change.

#### **2. Objectives**

2.1 The objective of consulting services is to develop a toolkit for climate resiliency actions that covers, among others, circular economy, NRW reduction and renewable energy and energy efficiency (RE/EE) for carbon neutrality for LAC water and sanitation utilities. Close coordination with the IDB project team, participating utilities and other stakeholders will be necessary to accomplish the proposed objective.

#### **3. Scope**

The consulting firm will be responsible for developing a comprehensive Toolkit for Climate-Resilient Strategies for Sustainable Water and Sanitation Management in LAC. Tasks will include conducting a needs assessment and stakeholder kickoff workshop for participating water utilities, data collection, desktop and field assessments of existing climate resilient strategies for sustainable water and sanitation management, and available reports; developing a preliminary toolkit for identifying and structuring resilience interventions, conducting feedback sessions on pilot toolkit, and creating training materials to conduct training sessions for utilities. It will take into consideration, among others, Trinidad and Tobago's Vulnerability and Capacity (VCA) Report (2018) as a basis of the vulnerabilities and hazards faced in the

water sector due to the impacts of Climate Change. The Toolkit must also consider financing mechanisms (public funds, Public Private Partnerships (PPPs), donor support and incorporate a Monitoring, Evaluation, and Learning framework to track progress towards national and international sanitation targets.

#### 4. **Key Activities**

- **Activity 1**: Conduct a needs assessment and stakeholder kickoff workshop for participating water utilities.
- **Activity 2**: Collect data on climate risks and climate resilience actions for water and sanitation utilities in LAC.
- **Activity 3**: Develop the preliminary toolkit for identifying and structuring resilient interventions for participating utilities.
- **Activity 4**: Conduct feedback sessions on pilot toolkit with participating utilities for ensuring functionality and relevance.

##### 4.1 **Activity Details**

A detail of the five main activities to develop in this consultancy are provided below:

###### ***4.1.1. Conduct a needs assessment and stakeholder kickoff workshop for participating water utilities.***

Organizing collaborative virtual workshop to gather input from key stakeholders, including water and sanitation utility managers, government representatives, and community leaders. Participants will discuss current challenges, climate risks, and existing resilience measures. The needs assessment will identify gaps and prioritize areas for intervention. This foundational meeting aims to foster relationships among stakeholders and ensure that the toolkit development aligns with the specific needs and contexts of participating utilities.

###### ***4.1.2. Collect data on climate risks and climate resilience actions for water and sanitation utilities in the LAC region.***

Comprehensive data collection will focus on climate-related risks, greenhouse gas mitigation opportunities, resilience investment needs, and financing mechanisms. Data collection further involves, among others, analyzing historical climate patterns, assessing vulnerability to extreme weather events, aquifer levels, Key Performance Indicators (KPIs) and documenting current resilience strategies. Additionally, research will explore how water and sanitation utilities can leverage carbon credits to fund resilience initiatives and assess the feasibility of their adoption in carbon markets. Engaging regional experts and utilizing existing research will help create a robust database, informing tailored climate resilience actions that are financially viable and context specific.

###### ***4.1.3. Develop the preliminary toolkit for identifying and structuring resilient interventions for participating utilities.***

The toolkit will be designed as a practical, decision-support resource with implementation pathways, prioritization criteria, financing options, and monitoring indicators. The preliminary version will include:

- **Climate Risk Screening Framework**: A step-by-step methodology for utilities to identify, assess, and prioritize climate risks affecting water supply, wastewater, and critical infrastructure.
- **Resilience Intervention Menu**: Practical guidance on selecting and prioritizing structural, operational, and nature-based resilience interventions based on risk levels, utility capacity, KPIs, financial impacts in the utility and investment needs.

- **Implementation Roadmaps:** Templates to support utilities in developing phased resilience action plans, including institutional responsibilities, indicative costs, financing options, and monitoring indicators.
- **Best Practices and LAC Case Studies:** Examples of successful resilience interventions from the LAC region, with a focus on Caribbean utilities, highlighting lessons learned and replicable approaches.
- **Carbon Finance Guidance:** Practical guidance on identifying, assessing, and developing carbon credit opportunities, including eligibility criteria, project development steps, monitoring requirements, and options for using carbon revenues to finance resilience investments.
- **Decision-Support Tools:** Simple checklists, screening matrix, and prioritization templates to facilitate decision-making and integration of resilience considerations into utility planning and asset management.

The toolkit will be aligned and complemented with an instrument currently under development by INE/WSA for risk-based investment prioritization: the Blue Spot Analysis (BSA) WASH, a digital and georeferenced methodology that enables the prioritization of infrastructure based on its levels of risk and vulnerability to extreme natural events. Once both tools become operative, the BSA WASH will use the same Climate Risk Screening Framework to be developed under this consultancy, and once the infrastructure has been prioritized, the Toolkit will identify the optimal interventions required to enhance climate resilience.

#### ***4.1.4. Stakeholder validation of pilot toolkit with participating utilities for ensuring functionality and relevance.***

The preliminary toolkit will be refined through consultations with utilities to ensure that it is practical, user-friendly, and tailored to the operational and institutional realities of LAC water and sanitation utilities. Feedback sessions will be organized with at least 6 water and sanitation utilities in LAC region (4 utilities will be beneficiaries from the Caribbean region) to evaluate the pilot version of the toolkit. These sessions aim to gather insights on the usability of the platform, functionality, and relevance of the resources provided. Stakeholders will have the opportunity to share their experiences, suggest improvements, and highlight any additional needs. This iterative process is crucial for refining the toolkit, ensuring it effectively supports utilities in implementing climate resilience strategies tailored to both common challenges and specific country context.

## **5. Expected Outcomes and Deliverables**

Different deliverables will be requested and processed through a task order that may include but are not limited to reports and presentations. With each task order, the firm will be expected to create a work plan that includes a start and end date, outline key processes needed to complete the work, and identify stakeholders from water utilities and key sector agencies, that will be contacted to complete the work.

**5.1 Deliverable 1.** Inception report and workplan, outlining the consultancy's approach, methodology, work plan, and timeline for completing the project.

**5.2 Deliverable 2.** Established stakeholder alignment and identified priority needs for climate resilience in participating utilities. A comprehensive needs assessment completed following a stakeholder kickoff workshop, with clearly identified challenges, climate risks, and priority intervention areas. Strengthened engagement and collaboration among key stakeholders ensure alignment with

utility-specific contexts.

**5.3 Deliverable 3.** Comprehensive database on climate risks (probability, impact and exposure), resilience actions, and carbon credit opportunities for LAC water utilities. A robust and evidence-based dataset developed, detailing climate vulnerabilities, existing resilience measures, and potential pathways for integrating carbon financing. This will support informed decision-making and tailored intervention planning.

**5.4 Deliverable 4.** Preliminary climate resilience toolkit developed for participating utilities in both English and Spanish languages. A draft, user-oriented toolkit produced, including user guidelines, best practices, case studies, and frameworks to identify and structure resilience interventions. The toolkit will also incorporate initial guidance on leveraging carbon credits to support resilience investments.

**5.5 Deliverable 5.** Validated and refined toolkit reflecting stakeholder feedback and operational needs. The pilot toolkit tested and improved through structured feedback sessions with utilities, resulting in an enhanced, practical, and context-relevant tool that effectively supports resilience planning and implementation.