REQUEST FOR EXPRESSIONS OF INTEREST

CONSULTING SERVICES FOR BANK-EXECUTED OPERATIONS

SIMPLIFIED COMPETITIVE SELECTION PROCESS

PROJECT NAME: Establishment of a TES Climate-Smart Diagnostic Module linked to the Digital Checkup Platform
SELECTION PROCESS #: RG-T4668-P007
SELECTION METHOD: Simplified Competitive
COUNTRY: Regional
SECTOR OR DEPARTMENT: Productivity, Trade and Innovation / Competitiveness, Technology, and Innovation (PTI/CTI)
TC NAME: Mainstreaming Climate Action in Private Sector Development Projects in the Caribbean
FUNDING – TC #: ATN/CO-21518-RG
LINK TO TC DOCUMENT: https://www.iadb.org/en/project/RG-T4668

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

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.)

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[1] or Territory[2] to be eligible to submit an Expression of Interest (EOI). *For this procurement process, as stated in the Compete Caribbean+ Trust Fund Proposal (GN-2851-2), CF from countries recognized as eligible by the donors of the Facility — namely the Government of Canada, the United Kingdom (FCDO), and the Caribbean Development Bank (CDB) — in addition to Bank Member Countries, are eligible to submit an EOI*. CF with the required experience relevant to the assignment shall be assessed. The Bank will conduct the assessment and ranking of the EOI submitted by the CF that expressed interest. The Bank will invite CF to submit a proposal in the order in which the ranking is established. If the proposal of the first-ranked CF is acceptable, the CF will be invited to negotiate a Contract. If the negotiations with the first-ranked CF fail, the next-ranked CF may be invited to submit a proposal and negotiate.

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: *Friday 6th November 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. If 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.

[1] **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.

[2] **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, Saint Marten, Saba, St Eustatius – as Departments of the Netherlands; d) Hong Kong – as a Special Administrative Region of the People's Republic of China.

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.

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: Kayla Grant (kaylag@iadb.org), copying Dario Pile (dpile@iadb.org) and Ibrahim Sekou Abdullah (iabdullah@iadb.org).

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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 climate resilience diagnostic module for micro, small and medium-sized enterprises (MSMEs), integrated into the IDB's Digital Checkup platform, for use across the Compete Caribbean+ countries. The estimated timeframe for the services is fifteen (15) weeks, and the estimated budget available for the consultancy is USD 75,000.

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: ***US$ 75,000***

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

Establishment of a TES Climate-Smart Diagnostic Module linked to the Digital Checkup Platform

1. Background and Justification

The Digital Checkup tool was developed by the Division of Competitiveness, Technology and Innovation (PTI/CTI) to help close the information gap on the state of digital maturity in the region. It is a free self-diagnosis tool that allows micro, small and medium-sized enterprises (MSMEs) to measure their level of digital maturity and understand the key concepts behind digitalization and its benefits. In addition, the tool provides MSMEs with personalized recommendations to start or accelerate digital transformation, facilitating its articulation with the offer of locally available resources. It is currently available in 18 Latin American and Caribbean (LAC) countries and more than 55,000 MSMEs have used the self-testing tool. The achieved scope has highlighted the need to update the tool both technologically and functionally, and the tool was modernized under RG-T4502.

Concurrently, under the RG-T4668 operation, Compete Caribbean+ (CC+) is establishing the Technology Extension Services (TES) mechanism, to be executed by the Caribbean Export Development Agency (CEDA) under RG-T4923. A fundamental mandate of this program is to incorporate climate technology adoption and resilience into MSME support frameworks across the 13 CC+ countries. Despite the existence of some climate vulnerability assessment tools, notably including the Jamaica Systemic Risk Assessment Tool (J-SRAT), no Caribbean context specific tool exists to provide the assessments and guidance for firms in this region to build their resilience.

The Inter-American Development Bank (IDB) is clear that in an increasingly digitized context, the management of data and administrative processes—particularly avoiding redundant infrastructure and survey fatigue—is essential. Creating separate, isolated diagnostic platforms generates operational inefficiencies for both the Bank and the end-user. Therefore, this project seeks to adapt, parameterize, and implement a dedicated Climate-Smart Diagnostic (Module 2) directly into the modernized Digital Checkup platform (Module 1), as a second independent form sharing the platform's authentication, hosting and administration, with its own scoring, routing and output logic.

This document of terms of reference establishes the guidelines for a consulting firm to develop Module 2 on the modernized Digital Checkup architecture. Implementation will be coordinated jointly by the Digital Checkup business team and the CC+ team. This approach will allow for a secure, adaptable environment aligned with Bank best practices, leveraging the existing authentication, hosting, and user management infrastructure to execute the climate diagnostic either after the Digital Checkup or as a standalone assessment.

The diagnostic will be completed by MSMEs either independently through the public platform or with support from a business support organization (BSO) facilitator. Its final output is a resilience profile with tailored recommendations for the MSME.

2. Objectives

2.1. General Objective:

Develop and integrate a dedicated TES Climate-Smart Diagnostic module within the modernized Digital Checkup architecture for computers, cell phones and tablets using modern technologies, ensuring its scalability, seamless data interoperability, and the generation of a unified resilience profile (the RAP), combining digital maturity results where available, for MSMEs in the 13 CC+ countries.

2.2. Specific Objectives:

The main functionalities that the TES Climate-Smart Diagnostic module must have are:

- Implementation of a relational data bridge to seamlessly inherit a defined set of MSME baseline variables from the Digital Checkup to the Climate Diagnostic. Where no Digital Checkup record exists, the module collects these variables directly.
- Implementation of a dynamic front-end interface to host an approximately 60-67 question climate diagnostic featuring progressive profiling and conditional routing based on sector and inherited data, completable with or without a facilitator.
- Implementation of the TES Climate Diagnostic calculation methodology in its own business layer, executing a scoring algorithm to generate categorical resilience ratings across thematic blocks and to assign each MSME a routing profile.
- Implementation of an automated rules engine that routes each MSME to recommended climate technology pathways.
- Generation of customized reports, specifically a unified Resilience Assessment Profile (RAP) synthesizing assessment results and tailored recommendations in a single visual dashboard and server-side generated downloadable format.
- Expansion of the anonymized application programming interfaces (APIs) and database schema to allow IDB and CC+ to receive flattened, combined digital and climate metrics for the CC+ results matrix, in compliance with the IDB Group Personal Data Privacy Policy and Access to Information Policy.
- Support in the installation, integration testing, regression testing, and remote commissioning of the combined tool for use across the CC+ countries.

3. Scope of Key Services and Activities

3.1. Scope

Functional Scope

The solution must include the following functional features as a direct extension of the core platform:

- **Assessment Session Management and Interoperability:** Implement persistent session state that allows MSMEs to complete the Digital Checkup (Module 1) and transition automatically to the Climate-Smart Diagnostic (Module 2) under a single MSME ID, without loss of data or the need to log in twice. Sessions must support save-and-resume. The Climate Diagnostic may be completed on its own or after the Digital Checkup.
- **Data Handshake and Inheritance Payload:** Build an automated data bridge that captures the baseline variables from the Digital Checkup (Module 1) record where one exists (otherwise collecting them directly) and injects them into the initialization of Module 2 to prevent redundant data entry and protect Module 1 data integrity.
- **Dynamic Form Engine (Progressive Profiling):** Develop a dynamic front-end interface to host the approximately 60-67 question climate diagnostic. The form must execute conditional routing, automatically mounting or hiding specific optional climate questions based on the inherited payload (e.g., activating coastal hazard questions strictly for Tourism/Blue Economy sectors or firms near a shoreline). The thematic architecture, routing rules and scoring are fixed. Wording, response labels, ordering and grouping may be refined in Output 1 provided scoring and routing logic remain intact.
- **Implement Business Layer (API) for Climate Scoring:** Implement all the logic that performs the calculations to generate the climate resilience profile. This includes converting responses into scored ratings across thematic blocks and assigning a routing profile, with priority cases flagged for follow-up.
- **Automated Pathway Rules Engine:** Implement a rule-based algorithm within the business layer that evaluates the calculated sub-scores and specific question responses against defined trigger rules to automatically assign climate technology pathways.
- **Dashboard with Visualizations for the MSME (RAP Generation):** When the MSME finishes the Climate Diagnostic, whether facilitated or self-administered, the system must automatically synthesize the digital maturity results (where a Digital Checkup has been completed) and the

climate pathway recommendations into a formatted, server-side generated, accessible, downloadable three-page Resilience Assessment Profile (RAP) as a PDF, with the full list of matched technologies as an appendix. This includes the MSME's results and tailored recommendations.

- **Dashboard with Visualizations for the Administrator:** Update the administrator view so that country administrators can see the combined results of both the Digital Checkups and the Climate Diagnostics of all the MSMEs within their jurisdiction, through new tabs and data columns added to the existing dashboard, without redesigning it. The view must show completion mode and any records flagged for review.
- **Anonymized API Extension:** Adjust the anonymized API to allow the expanded dataset (including the specific climate metrics, routing results, program status indicators, and combined CC+ results matrix indicators) to be shared in a centralized environment so that IDB and CC+ staff can use these results for program monitoring and decision-making. The API must not expose personally identifiable information. IDB and CC+ do not require administrator access to the platform. Export formats will be agreed in Output 1.
- **Data Protection and Privacy by Design:** The consultant must ensure the module incorporates robust data protection and privacy protocols. The design must adhere to IDB security standards for the handling of sensitive MSME information, utilizing the encrypted authentication and secure hosting infrastructure of the modernized Digital Checkup. The module must comply with the data protection clauses of the contract.
- **Completion Modes:** The module must support facilitated and self-administered completion, including in-form help text, a recorded completion mode, and automated consistency checks that flag contradictory responses for review without blocking submission.
- **Integrity and Administration:** The module must include assessment integrity controls, program activation by administrators, qualification-status tracking and versioned audit records.

Technical Reach

The module must seamlessly inherit and adhere to the technical requirements established in the Digital Checkup modernization:

- Technical Information Package: The IDB will provide the selected firm with the existing Database Schema, API specifications, the Authentication Model, and the administrator and technical documentation of the modernized Digital Checkup at kickoff to eliminate assumptions during development.
- Interaction Boundaries: The consultant must ensure strict decoupling of Module 2. The firm is responsible for Full-Stack Regression Testing of the Administrator Dashboard to ensure Module 2 integration does not degrade existing functionalities or performance of Module 1.
- Shared Authentication and User Control: The module must utilize the exact authentication model and role management system implemented for the core Digital Checkup, introducing no new roles or permission matrix.
- Database Schema Extension: Expand the relational database model to securely store the approximately 60-67 new climate variables, sub-scores, routing results and generated outputs, ensuring strict relational mapping to the primary MSME profile without altering legacy checkup data structures via documented migration plans and rollback scripts.
- Technology Stack Compatibility: Ensure the front-end components and back-end logic are built using the identical open-source technologies defined for the core application: Angular 18, TypeScript, Node.js 20+, Express 4.21, Sequelize 6 and SQL Server (Azure SQL recommended).
- Possibility of Deployment: The integrated solution will be deployed within the environment hosting the modernized Digital Checkup (Cloud4LAC development, quality assurance (QA) and production environments), utilizing the same redundancy and advanced security tools, and must remain installable on country infrastructure, in the cloud or on-premises, as the core platform is.
- Multi-language: The climate module must be configured to work in English, Spanish, Portuguese, Dutch, and French, matching the core platform.
- Data Model Verification: The consultant must verify that the baseline variables are available and correctly mapped in the modernized Digital Checkup data model. Migration of historical records from legacy Digital Checkup instances is outside the scope of this consultancy. Migration of Caribbean Export's existing Digital Checkup to the modernized platform is managed separately and is also outside the scope of this consultancy.

- Performance: Module 2 must introduce no noticeable latency on core page loads.
- Quality Gates: Code must pass the core platform's continuous integration and delivery (CI/CD) pipeline and static-analysis quality gates before deployment.
- Responsiveness and Connectivity: The interface must be fully responsive across desktop, tablet and smartphone. The module operates online only; offline data capture is not required.
- User Interface: The firm designs the UX for Module 2 using the Digital Checkup design system, visual guidelines and co-branding assets provided at the design phase. No changes to the existing Digital Checkup interface are required.

3.2. Key Activities

- Perform a user experience and user interface (UX/UI) design exercise to integrate the new climate flow of approximately 60-67 questions for both facilitated and self-administered completion, ensuring the interface remains user-friendly and prevents survey fatigue with a target completion time of 15–20 minutes.
- Develop a comprehensive migration plan including rollback scripts, for the extension of the production database.
- Design with the team the new Resilience Assessment Profile (RAP) visualization dashboard for the MSMEs, and the expanded control dashboard for Administrators.
- Extend the database model to accommodate the TES climate parameters while ensuring that data privacy and encryption standards are maintained across all new relational data bridges.
- Development and testing of the dynamic front-end form, specifically ensuring the conditional routing rules execute perfectly based on inherited sector and location data.
- Creation of the API with the business layer for the climate scoring, profile assignment and recommendation logic.
- Adjust the anonymized API for centralized results integration, ensuring CC+ indicators can be extracted by IDB/CC+ personnel.
- Conduct rigorous system-wide regression testing to ensure the combined tool remains stable post-integration, specifically validating the Administrator Dashboard and core data contracts.
- Conduct rigorous interoperability testing to ensure the payload passes securely from Module 1 to Module 2 without data loss or latency.
- Carry out the documentation (technical, functional, user manuals) specifically detailing the climate algorithm logic, the data bridge mapping, and the RAP generation process.
- Review the technical documentation provided and maintain an issues log of inconsistencies, gaps and assumptions, to be resolved with CC+ at inception and recorded in the Algorithm Logic Manual.

4. Team Composition

For the correct execution of the service, the following team is required:

- UX/UI Designer: Interface and user experience design specifically for the approximately 60-67 question climate diagnostic, progressive profiling flows, and the 3-page Resilience Assessment Profile (RAP) dashboard.
- Frontend Developer: Implementation of the dynamic interface, conditional routing logic, and visualization reports.
- Backend Developer: API implementation, construction of the relational data bridge (payload inheritance), the climate scoring algorithm, profile assignment and recommendation logic.
- Testing Professional: Quality, security, and interoperability testing, specifically validating system-wide regression testing for the administrator dashboard.
- Cloud and On Premises Specialist: Infrastructure oversight to ensure the expanded database schema for the climate variables deploys correctly utilizing mandatory migration and rollback protocols.
- Data Analytics Expert (or equivalent dashboard experts): Deploying the combined visualizations (digital maturity + climate resilience) for the Administrator control panels and the MSME RAP outputs.
- Project Leader: Coordination and fulfillment of objectives, ensuring simultaneous alignment with both the

PTI/CTI and CC+ teams.

5. Project Schedule and Expected Outputs

The service will be executed over a **15-week period**, operating on an iterative phased approach to ensure technical feasibility, security alignment, and operational stability. Weekly technical syncs will be held with the IDB (PTI/CTI) Digital Checkup team and Compete Caribbean+ (CC+) to manage cross-module dependencies.

The tasks for this consultancy will be distributed as follows:

- Output 1 – Technical Onboarding, Architecture Extension and Prototyping (Week 4):

  Deliverable defining the extended database model, the relational data bridge mapping the baseline variables, and the conditional routing logic map. This must include the mandatory technical migration plan and rollback scripts for the Climate Diagnostic database extension on the modernized Digital Checkup. Includes the finalized User Interface design of the Climate Diagnostic flow and the Resilience Assessment Profile (RAP) output, confirmation of the final question set, version 1 of the Algorithm Logic Manual, and resolution of the issues log, all validated and accepted by CC+ and IDB staff.
- Output 2 – Frontend Integration and Data Inheritance (Week 8):

  Report and test environment demonstration of the implemented climate module front-end. This must document the successful implementation of the session persistence and save-and-resume, the variable inheritance payload from the Digital Checkup, standalone issuance, and the dynamic mounting of sector-specific climate questions verified against the provided API specifications.
- Output 3 – Business Logic, Scoring, and RAP Generation (Week 12):

  Documentation and test environment demonstration proving the successful implementation of the backend climate scoring engine. This must detail the execution of the scoring algorithm, profile assignment, recommendation logic, consistency checks, and the successful automated, server-side generation of the RAP dashboard and downloadable PDF.
- Output 4 – Regression Testing, APIs, Deployment, and Start-up (Week 15):

  Successful completion of full system-wide regression testing ensuring Administrator Dashboard stability. Detail ensuring the expanded database successfully captures the new variables for combined CC+ results matrix reporting. Update of the anonymized API for centralized results integration. Deployment in the production environment, final end-to-end tests, training of administrators, and delivery of all final technical documentation including the final Algorithm Logic Manual.