

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

PROJECT NAME: ANALYZING AND SUPPORTING THE DEVELOPMENT OF SECTOR MANUALS FOR GUIDING IDB CLIMA OPERATIONS IN THE EDUCATION AND HOUSING AND URBAN DEVELOPMENT SECTORS
SELECTION PROCESS #: B260284

SELECTION METHOD: Simplified Competitive

COUNTRY: Regional

SECTOR OR DEPARTMENT: CCS/CSD

TC NAME: Supporting the deployment and implementation of the IDB CLIMA Pilot Program

FUNDING – TC #: ATN/OC-22545-RG

LINK TO TC DOCUMENT: <https://www.iadb.org/en/project/RG-T4945>

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 Country¹ or Territory² to be eligible to submit an Expression of Interest (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: **November 9, 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.

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..

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.

2.4 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: [\[Federico Brusa: fbrusa@iadb.org\]](mailto:fbrusa@iadb.org)

Inter-American Development Bank

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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 *[analyzing and supporting the development of the Green Transition Framework (GTF) Sector Manuals for the Education (EDU) and Housing and Urban Development (HUD) divisions, which will guide the design of IDB CLIMA Pilot Program operations and other IDB climate and biodiversity interventions in these sectors. The consulting firm will review relevant IDB and external frameworks, interview IDB and counterpart stakeholders, and draft both manuals. The manuals will include guidance on the green transition context of each sector and on the definition of actions, products, and Key Performance Indicators (KPIs) covering climate change mitigation, adaptation, and biodiversity. The firm will also facilitate validation sessions with IDB specialists and prepare executive summaries and a training presentation for Bank staff. The services are expected to be performed over approximately 10 months, from November 2026 to August 2027. The estimated budget available for this consultancy is up to US\$38,000, inclusive of all fees and expenses.]*

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\$38,000]**

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

1. Analyzing and supporting the development of sector manuals for guiding IDB CLIMA operations in the Education and Housing and Urban Development sectors

RG-T4945

ATN/OC-22545-RG

Supporting the deployment and implementation of the IDB CLIMA Pilot Program _

1. Background and Justification

1.1. The IDB has vast experience working with Latin America and Caribbean countries to support climate- and nature- related action aligned with national development priorities. Through policy and financial support, it helps countries translate these priorities into practical solutions and measurable outcomes over time. Aligning IDB Group financing to the goals of the Paris Agreement is part of this agenda and therefore since January 1st, 2023, all operations are assessed to ensure they do not obstruct the transition to low greenhouse gas and climate resilient economies in line with the goals of the Paris Agreement.

1.2. On a global scale, current financial flows are inadequate to meet national environmental objectives. Green thematic debt issuances in capital markets may offer countries in the region an opportunity to mobilize additional financing that has not yet being fully leveraged. In that context, Multilateral Development Banks (MDBs) have been called to develop new financial instruments that reward investments aligned with countries' climate and nature priorities and help strengthen their access to capital markets through green thematic debt issuances.

1.3. For this purpose, the IDB designed the IDB CLIMA Pilot Program, which aims to incentivize sector driven investments that will help accelerate the access of sovereign borrowers to green thematic capital markets. To attain this goal, IDB CLIMA offers a grant to borrowers that successfully reach measurable results through Key Performance Indicators (KPIs) in sectoral investments that: i) reduce development gaps while delivering impact in terms of biodiversity and climate (KPI#1), ii) strengthen the sector's capabilities to

develop sectoral project pipelines that include climate and/or biodiversity considerations (KPI#2), and iii) strengthen sector-driven biodiversity and climate monitoring, reporting and verification systems to meet international climate, biodiversity and green thematic debt standards (KPI#3). To define investments pertaining to KPIs #2 and #3, borrowers must first assess their existing capabilities through an assessment questionnaire designed for this end, taking as a reference the fit-to-purpose Green Transition Framework (GTF). The GTF is a CCS-led framework currently under development to support capacity building and to help diagnose and guide borrowers' efforts toward the green transition. This framework is being conceptualized and piloted through IDB CLIMA. The GTF reflects the recognition that capacities across LAC differ significantly across and within countries and sectors, and that each country operates in a distinct development context. It follows a three-stage sequential approach that allows borrowers to benefit from IDB technical and financial support as they evolve from an incipient stage –in which they have limited capabilities to access green thematic debt markets– to a stage in which they are able to systematize green thematic debt issuances. The GTF bottom-up approach consists of three main instruments that operationalize its ambitions during loan design: the GTF Sector Manuals, the GTF Assessment Questionnaire, and the GTF Roadmap.

1.4. Central to this approach are the GTF Sector Manuals, developed to guide and support teams across the IDB VPS divisions in designing investment projects and defining KPIs that promote a bottom-up, sector-driven green transition. Sector manuals are developed progressively as IDB CLIMA pilot projects are approved in different sectors. GTF Sector Manuals for Water and Sanitation (WSA), Energy (ENE), and Connectivity, Markets and Finance (CMF) are already being prepared, generating useful lessons on how these manuals can be structured and developed.

1.5. More recently, an IDB CLIMA pilot project was approved in the Education (EDU) division, and another pilot project in the Housing and Urban Development (HUD) division is currently at an advanced stage of design. In that context, this consultancy will aid in developing the GTF Sector Manuals for Education (EDU) and Housing and Urban Development (HUD), which will contribute to framing the sectors within a GTF. Additionally, these manuals will outline how to measure results using KPIs, aligning with the types of interventions required by relevant Bank programs and instruments for a green transition, like IDB CLIMA Pilot Program. For this first version of the Sectoral Manuals, each KPI will cover three dimensions: climate change mitigation, climate change adaptation, and biodiversity conservation, restoration, and sustainable use. These Sectoral Manuals will build upon and align with relevant IDB Group and IDB documents and initiatives, ensuring consistency across IDB VPS sectors as they define their interventions within the scope of the IDB CLIMA Pilot Program. This includes, but is not limited to, the IDB Group Institutional Strategy, Sector/Thematic Frameworks/Action Plans, the climate change and natural capital/biodiversity action plans, as well as the Paris Alignment Implementation Approach (PAIA) and its sectoral technical guidance.

2. Objectives

2.1. This consultancy will assess and support the development of sectoral manuals for guiding green transition through IDB CLIMA Operations and other IDB climate and biodiversity interventions in the Education (EDU) and the Housing and Urban Development (HUD) divisions.

3. Scope of Services

3.1. This consultancy aims to assess and support the development of sectoral manuals to guide the Green Transition Framework in the Education (EDU) and the Housing and Urban

Development (HUD) divisions through IDB CLIMA Operations and other IDB climate and biodiversity interventions. The consultant will review existing practices, engage stakeholders, and create comprehensive manuals that include best practices, strategies for integrating climate and biodiversity considerations, and tools for implementation. Additionally, the consultancy will provide recommendations for designing Key Performance Indicators (KPIs) that may align with the SGDeltacatalog of root indicators defined by SPD. If agreed with the Bank, a list of suggested impact indicators may also be provided. This effort will facilitate a sector-led approach to green transition, contributing to the development of the Green Transition Framework (GTF) from a bottom-up perspective.

4. Key Activities

- 4.1.** Conduct a comprehensive review of all relevant documents related to the IDB CLIMA Pilot Program and collaborate with the team to ensure a thorough understanding of the program.
- 4.2.** Analyze key external frameworks and internal strategic documents, including the IDB Group Institutional Strategy, Strategy Action Documents, Sector/Thematic Frameworks, Climate Change Action Plan, the Natural Capital and Biodiversity Mainstreaming Action Plan, and non-IDB sources that might document best international practice (e.g. MDB publications on resilience for the selected sectors and MDB frameworks for adaptation and resilience indicator design for HUD and EDU projects). Emphasize climate and nature finance, particularly in relation to the Corporate Results Framework and the Paris Alignment Implementation Approach.
- 4.3.** Interview key IDB stakeholders in the VPC and VPS sectors to identify requirements and critical issues for assessment in the Sector Manuals (up to ten interviews in total).
- 4.4.** Interview a group of key IDB and IDB counterpart stakeholders to pinpoint requirements and key issues that they deem should be assessed through the Sector Manuals (up to ten interviews).
- 4.5.** Create a draft section for the EDU and HUD sector manuals that outline the context of the Green Transition. This section will highlight the challenges, gaps, and opportunities for IDB Divisions to assume a transformational role in advancing the Green Transition, drawing on insights from reviewed documents and feedback from interviews conducted in tasks 4.1 to 4.4. In particular, this draft section will need to (1) focus on the most relevant IDB business lines in the sector, (2) incorporate a vision that goes beyond individual projects towards a systemic transition perspective (i.e. including elements like territorial planning, sectoral governance, etc.), and (3) provide guidance on considerations that have usually been left behind when implementing projects in the sector, like addressing the slow-onset impacts of climate change.
- 4.6.** Develop a draft section for the EDU and HUD sector manuals to guide the design of IDB CLIMA pilot projects. This section will address key aspects such as the operational cycle, vertical logic, and the definition of actions, products, and KPIs, incorporating insights from reviewed documents and feedback from interviews conducted in tasks 4.1 to 4.4. Special emphasis will need to be placed on topics that surface in interviews as the most relevant challenges in practice for project teams, like the design of adaptation and resilience indicators.
- 4.8.** Facilitate collaborative work sessions with relevant IDB specialists, including the Paris Alignment tracking team, to present the proposed sections of the EDU and HUD Sector Manuals. Gather feedback during these sessions and incorporate it into the final draft.
- 4.9.** Compile the sections developed in tasks 4.5, 4.6, and 4.7 into a comprehensive final draft proposal for the sector manuals for EDU and HUD. Ensure that all defined sections and appendices are included and that the proposal reflects feedback gathered from

collaborative work sessions conducted in task 4.8.

4.10. Create a presentation on the sector-specific considerations for the use and application of the EDU and HUD Sector Manuals, intended for the IDB CLIMA team to deliver training to specialists in relevant areas within the Bank.

5. Expected Outcome and Deliverables

5.1. Workplan outlining approach and milestones

Draft Sector Manuals for EDU and HUD

5.2. Executive summaries for sectoral manuals for EDU and HUD.

5.3. Presentation on the sector-specific considerations for the use and application of the EDU and HUD Sectoral Manuals.

6. Project Schedule and Milestones

<u>Deliverables</u>	<u>Planned Date to Submit</u>
1. Workplan	December 2026
2. Draft EDU Sector Manual.	February 2026
3. Draft HUD sector Manual	April 2026
4. Executive summaries for sectoral manuals for EDU and HUD	June 2027
5. Presentation on the sector-specific considerations for the use and application of the EDU and HUD Sectoral Manuals.	August 2027

7. Reporting Requirements

7.1. The consulting firm will submit the deliverables according to the schedule established in section 5 of these Terms of Reference.

8. Acceptance Criteria

8.1. The IDB will disburse payments after approval of the deliverables. The acceptance of deliverables will be given by the IDB when all comments received during the revision process are included in the submitted reports.

9. Consulting Firm and Team Requirements

9.1. Previous experience with the IDB or other multilateral agencies in operations in the Housing and Urban Development Sector (including definitions of indicators), with knowledge of the challenges and opportunities presented in climate change in said sector. Must also have knowledge related to the IDB strategy in the sector, including the HUD/EDU Sector Framework Document and the Paris Alignment Implementation Approach. Experience and knowledge in climate and nature policy for the HUD/EDU sector will also be highly valued. Describe the general experience and main characteristics expected to be met by the consulting firm, as well as the composition of the team to carry out the consultancy. If necessary, indicate the characteristics that are expected from each of the key experts that will make up the work team, including abilities, experience, etc.)

10. Supervision and Reporting

10.1. The IDB Climate Change Division will have technical responsibility for the execution of this process as well as for the approval of the deliverables prepared by the consulting firm. In representation of the IDB, the technical coordination and leadership for this consultancy rests with IDB's staff member Federico Brusa, climate change senior specialist.

11. Schedule of Payments

- 11.1.** Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required. The Bank wishes to receive the most competitive cost proposal for the services described herein.
- 11.2.** The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

Payment Schedule	
<i>Deliverable</i>	%
1. Workplan	20
2. Draft EDU Sector Manual	20
3. Draft HUD sector manual	20
4. Executive summaries for EDU and HUD Sector Manuals	20
5. Presentation on the sector-specific considerations for the use and application of the EDU and HUD Sectoral Manuals.	20
TOTAL	100%