

## **Consultant for the Development of Data Transfer Protocols for the Mexican Government at the IFD-ICS**

### **Post of Duty: Mexico**

The IDB Group is a community of diverse, versatile, and passionate people who come together on a journey to improve lives in Latin America and the Caribbean. Our people find purpose and do what they love in an inclusive, collaborative, agile, and rewarding environment.

### **About this position**

We are looking for a consultant with higher formation in Information Technology, Computer Science, Data Management, Digital Transformation, or a closely related field, and a strong foundation in data architecture, systems integration, or digital governance to support the development of data user transfer and protocols in the Government of Mexico.

You will work in the Innovation for Citizen Services Division (ICS) which is part of the Institutions for Development (IFD) department. This team aims to improve the provision of public services and address its work into four clusters: (i) Public Management, (ii) Digital Government, (iii) Transparency, and (iv) Citizen security. This consultancy will support the better regulation team within the Digital Government Cluster, who provides technical and financial support to governments to design and implement regulatory reforms as a key element to modernize the state, improve productivity and increase confidence in public institutions.

This consultancy is essential because Mexico currently lacks standardized protocols and syntax for data transfer, which hinders the integration and efficiency of its digital systems. The absence of these standards makes it difficult for different levels of government—federal, state, and municipal—to effectively communicate and share information. This fragmentation creates inefficiencies in public service delivery and undermines the potential benefits of digital transformation.

As Mexico increasingly adopts technology to optimize and reengineer public processes, the need for a unified data transfer architecture becomes more urgent. Without standardized data protocols, the country cannot fully realize the benefits of digital tools, such as streamlined services, enhanced transparency, and improved citizen well-being. This consultancy aims to address these challenges by developing a robust framework for data interoperability, ensuring that digital services are effectively integrated and aligned with the broader goals of modernizing public administration.

### **What you'll do:**

- **Design and Development of Protocols:** Lead the creation and implementation of a conceptual framework, standards, and syntax for data transfer, ensuring interoperability across federal, state, and municipal government systems.
- Facilitate collaborative workshops with representatives from various levels of government and experts in data management to co-develop data transfer protocols that align with the broader goals of digital transformation.

## HRD Terms of Reference

## ANNEX A

- Design and deliver comprehensive training programs for IT personnel and data managers across different levels of government, ensuring they are equipped to implement and maintain the new data transfer protocols.
- Document the processes, outcomes, and lessons learned from the development and implementation of data transfer protocols, providing actionable insights to the Mexican government.

### Deliverables and Payments Timeline:

Click or tap here to enter text.

<u>Deliverable #</u>	<u>Description</u>	<u>Percentage</u>	<u>Planned Date to Submit</u>
Technical Training and Capacity Building:	Training materials, including manuals and presentations, and a report on the completion and outcomes of training sessions provided to IT personnel and data managers.	25%	One months after starting the contract
Workshops with representatives from federal, state, and municipal governments	Minutes and reports from collaborative workshops, including a finalized set of protocols agreed upon by stakeholders from federal, state, and municipal levels.	25%	Within 2 months after starting the contract
Design and Development of Protocols:	A comprehensive conceptual framework document, along with developed standards and syntax for data transfer protocols, ensuring interoperability across government systems.	25%	Within 4 months after starting the contract
Reporting and Documentation:	A final comprehensive report documenting the entire process, outcomes, challenges, and lessons learned during the development and implementation of data transfer protocols, provided to the Mexican government.	25%	Within 8 months after starting the contract

### What you'll need

- **Education:** A Master's degree or higher in Information Technology, Computer Science, Data Management, Digital Transformation, or a closely related field. A strong foundation in data architecture, systems integration, or digital governance is essential.
- **Experience: Minimum of 7-10 Years of Professional Experience:** Demonstrated experience in the design, development, and implementation of data transfer protocols, standards, and interoperability frameworks across complex systems, preferably within government or large-scale organizations

- **Languages:** Proficiency in Spanish and English, spoken and written, is required. Additional knowledge of French and Portuguese is preferable.

**Key skills:**

- Learn continuously.
- Collaborate and share knowledge.
- Focus on clients.
- Communicate and influence.
- Innovate and try new things.

**Requirements:**

- **Citizenship:** IDB: You are either a citizen of one of our 48-member countries eligible to obtain a valid residency or legal permit to work in Mexico without the need for sponsorship by the IDB.
- **Consanguinity:** You have no family members (up to the fourth degree of consanguinity and second degree of affinity, including spouse) working at the IDB, IDB Invest, or IDB Lab.

**Type of contract and duration:**

- **Type of contract:** Products and External Services Consultant (PEC), Lump Sum.
- **Length of contract:** 8 months.
- **Work Location:** Remote

**Our culture**

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We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job interview process. If you are a qualified candidate with a disability, please e-mail us at [diversity@iadb.org](mailto:diversity@iadb.org) to request reasonable accommodation to complete this application.

**Our Human Resources Team reviews carefully every application.**

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**About IDB**

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## **Consultant for the Design and Implementations of Pilot intervention of the Virtual Data Manager VDM at the Municipal Level in Mexico – IFD-ICS**

### **Post of Duty: Mexico**

The IDB Group is a community of diverse, versatile, and passionate people who come together on a journey to improve lives in Latin America and the Caribbean. Our people find purpose and do what they love in an inclusive, collaborative, agile, and rewarding environment.

### **About this position**

#### **Description**

We are looking for a consultant to coordinate support the IDB to test the scalability of the Virtual Data Manager (VDM) by implementing it at the municipal level with vertical integration.

You will work in the Innovation for Citizen Services Division (ICS) which is part of the Institutions for Development (IFD) department. This team aims to improve the provision of public services and address its work into four clusters: (i) Public Management, (ii) Digital Government, (iii) Transparency, and (iv) Citizen security. This consultancy will support the better regulation team within the Digital Government Cluster, who provides technical and financial support to governments to design and implement regulatory reforms as a key element to modernize the state, improve productivity and increase confidence in public institutions.

The Virtual Data Manager (VDM), previously known as the Expediente Electrónico Empresarial (EEE), is an electronic tool created by the Mexican Government and established in the Regulatory Improvement Law. Its purpose is to ensure that government entities do not need to request documents from citizens and businesses that they already possess. This aims to streamline administrative processes, procedures, and formalities for both businesses and citizens. The tool has been continuously developed and expanded in its functionalities, with its application tested through pilot programs involving business-related procedures and services.

The IDB has been supporting the development and implementation of the VDM as a mechanism for the consultation and transparency of digital or digitized documents. It aims to reduce administrative burdens for individuals and businesses through datafication, improve legal certainty, and address corruption.

Key benefits include eliminating the need for physical document handling, centralizing digital interactions, providing anonymized or personalized access to

For this consultancy, it is required to design the scalability strategy of the Virtual Data Manager (VDM) and implement it through pilots at subnational authorities. The lessons learned from these pilots will guide improvements to make the VDM more agile and adaptable to the diverse needs of federal entities. In line with these efforts, this TC will continue to strengthen the institutional capacities at both federal and subnational levels to foster a more favorable business environment across the country.

**What you'll do:**

- **Design a Scalability and Vertical Integration Strategy:** Develop a comprehensive strategy that outlines how the VDM can be expanded to include all relevant business procedures and services at the subnational level. This strategy will serve as a blueprint for future implementations and ensure that the VDM can be seamlessly integrated across different levels of government.
- **Pilot Development and Implementation:** Select a specific municipal procedure that relies on data from state or federal entities. Implement the VDM to manage this procedure, allowing for an assessment of the tool's functionality and its integration with existing systems.
- **Evaluation and Feedback Loop:** Establish a continuous evaluation process during the pilot, gathering feedback from municipal officials and users. This will help identify areas for improvement and ensure that the VDM is refined to meet the specific needs of municipal-level operations.

**Deliverables and Payments Timeline:**

Click or tap here to enter text.

<b><u>Deliverable #</u></b>	<b><u>Percentage</u></b>	<b><u>Planned Date to Submit</u></b>
Vertical Integration Strategy Document: A comprehensive strategy for integrating the VDM across municipal, state, and federal levels, detailing the approach for vertical integration.	25%	Within 1 month of starting the contract
Pilot Design: Detailed design of a pilot intervention for a specific municipal procedure, including identification of the procedure, state or federal data dependencies, and the customization plan for the VDM.	25%	Within 3 months of starting the contract
Technical Support Report: A framework for providing ongoing technical support and maintenance during the pilot phase.	25%	Within 6 months of starting the contract
Final Pilot Evaluation Report: A report on the outcomes of the pilot, including lessons learned and recommendations for scaling the VDM across other municipalities and states.	25%	Within 10 months of starting the contract

**What you'll need**

- **Education:** A Bachelor's degree in Computer Science, Information Systems, Public Administration, Engineering, or a related field. A Master's degree or higher in Digital Governance, Data Management, or a related discipline is preferred.
- **Experience:** Minimum **7-10 years** of professional experience in designing and implementing digital transformation projects, particularly in public sector environments. Proven experience in **data management** and **system integration** projects, with a focus on intergovernmental data exchange and digital service delivery. **Track record** of developing strategies for the adoption of digital tools at various levels of government (federal, state, and municipal). Experience in **conducting pilot interventions** and scaling

digital solutions in complex, multi-stakeholder environments. Previous experience working with **public administration** and familiarity with regulatory frameworks in Mexico is highly desirable.

- **Languages:** Proficiency in Spanish and English, spoken and written, is required. Additional knowledge of French and Portuguese is preferable.

**Key skills:**

- Learn continuously.
- Collaborate and share knowledge.
- Focus on clients.
- Communicate and influence.
- Innovate and try new things.

**Requirements:**

- **Citizenship:**  
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**Type of contract and duration:**

- **Type of contract:** Products and External Services Consultant (PEC), Lump Sum.
- **Length of contract:** 10 months.
- **Work Location:** On site.

**Our culture**

At the IDB Group we work so everyone brings their best and authentic selves to work, willing to try new approaches without fear, and where they are accountable and rewarded for their actions.

Diversity, Equity, Inclusion and Belonging (DEIB) are at the center of our organization. We celebrate all dimensions of diversity and encourage women, LGBTQ+ people, persons with disabilities, Afro-descendants, and Indigenous people to apply.

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## **HRD Terms of Reference**

## **ANNEX A**

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**Individual consultant to support prepare a study case on the lessons learned for the implementation and integration of Virtual Data Manager****Post of Duty: remote**

The IDB Group is a community of diverse, versatile, and passionate people who come together on a journey to improve lives in Latin America and the Caribbean. Our people find purpose and do what they love in an inclusive, collaborative, agile, and rewarding environment.

**About this position**

We are looking for consultant in the field of economics, public policy, public administration or other related, to conduct a report on the lessons learned for the implementation and integration of Virtual Data Manager (VDM).

You will work in the Innovation for Citizen Services Division (ICS) which is part of the Institutions for Development (IFD) department. This team aims to improve the provision of public services and address its work into four clusters: (i) Public Management, (ii) Digital Government, (iii) Transparency, and (iv) Citizen security. This consultancy will support the better regulation team within the Digital Government Cluster, who provides technical and financial support to governments to design and implement regulatory reforms as a key element to modernize the state, improve productivity and increase confidence in public institutions.

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The IDB has been supporting the development and implementation of the VDM as a mechanism for the consultation and transparency of digital or digitized documents. It aims to reduce administrative burdens for individuals and businesses through datafication, improve legal certainty, and address corruption.

Key benefits include eliminating the need for physical document handling, centralizing digital interactions, providing anonymized or personalized access to digital channels, and ensuring universal validation of digital data by authorities. However, the tool requires further strengthening, as it currently does not have the capability to store data or to create a dedicated client file containing all their data.

**What you'll do:**

- Document review and preliminary analysis
- Stakeholder interviews and consultation

- Identify the main challenges encountered during the VDM implementation, both technical and operational.
- Document of lessons learned: Draft a detailed report documenting the lessons learned during the VDM implementation process, highlighting the aspects that contributed to the project's success and those that presented difficulties.
- Development and Presentation of the Case Study:
- Prepare and deliver a presentation of the case study to stakeholders, emphasizing the lessons learned and their applicability in other contexts

### **Deliverables and Payments Timeline:**

Click or tap here to enter text.

<b><u>Deliverable #</u></b>	<b><u>Percentage</u></b>	<b><u>Planned Date to Submit</u></b>
Preliminar report on a study case on the lessons learned for the implementation and integration of Virtual Data Manager	30%	Within one month of starting the contract
Preliminar report on a study case on the lessons learned for the implementation and integration of Virtual Data Manager	30%	Within 3 months of starting the contract
Final report	40%	Within 6 months of starting the contract

### **What you'll need**

- **Education:** Master's degree in public administration, public policy, economics, law or other related fields or equivalent experience
- **Experience:** Minimum of 5 years of experience in public sector management in Latin America, both at national and sub-national level, particularly in aspects of regulatory process improvement and regulatory capacity building
- **Languages:** Proficiency in Spanish and English, spoken and written, is required. Additional knowledge of French and Portuguese is preferable.

### **Key skills:**

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- Collaborate and share knowledge.

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**Requirements:**

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## TERMS OF REFERENCE

### Consultant for Implementation of the Virtual Data Manager VDM in two federal states of Mexico— IFD-ICS

MEXICO

ME-T1530

Support for administrative simplification and regulatory improvement at the federal and subnational levels in Mexico

#### 1. Background and Justification

##### **1.1. (Provide a brief background of any information that is important to understand in order to accomplish the project/contract goals.)**

The Virtual Data Manager (VDM), previously known as the *Expediente Electrónico Empresarial (EEE)*, is an electronic tool created by the Mexican Government and established in the Regulatory Improvement Law. Its purpose is to ensure that government entities do not need to request documents from citizens and businesses that they already possess. This aims to streamline administrative processes, procedures, and formalities for both businesses and citizens. The tool has been continuously developed and expanded in its functionalities, with its application tested through pilot programs involving business-related procedures and services.

The IDB has been supporting the development and implementations of the VDM as a mechanism for the consultation and transparency of digital or digitized documents. It aims to reduce administrative burdens for individuals and businesses through datafication, improve legal certainty, and address corruption.

Key benefits include eliminating the need for physical document handling, centralizing digital interactions, providing anonymized or personalized access to digital channels, and ensuring universal validation of digital data by authorities. However, the tool requires further strengthening, as it currently does not have the capability to store data or to create a dedicated client file containing all their data.

#### 2. Objectives

##### **2.1. We are looking for a consultant to support the implementation of the Virtual Data Manager VDM in two federal states of Mexico**

#### 3. Scope of Services

##### **3.1. The consultancy for the *Implementation of the Virtual Data Manager (VDM) in Sonora and Tamaulipas* will involve a comprehensive set of activities designed to ensure the successful adaptation, deployment, and integration of the VDM at the state level.**

#### 4. Key Activities

**Selection and Analysis of Candidate Procedures:**

- Identify and evaluate two specific procedures in Sonora and Tamaulipas that can benefit from the Virtual Data Manager (VDM) and analyze of the data needs, data sources, and processes involved in these procedures.
- Collaborate with state and local government officials to select procedures that have significant impact and data-sharing requirements.
- Adapt the VDM to meet the specific needs of the selected procedures, including adjustments to accommodate local data formats and integration requirements.
- Develop and configure the VDM to interface with the relevant state and federal data systems involved in the chosen procedures.

#### **Pilot Implementation and Testing:**

- Deploy the customized VDM for the selected procedures in both Sonora and Tamaulipas.
- Monitor and evaluate the performance of the VDM during the pilot phase, addressing any technical issues and making necessary adjustments.
- Collect feedback from users and stakeholders to assess the effectiveness of the tool in real-world scenarios.

#### **Technical Support and Maintenance:**

- Provide ongoing technical support to address any issues that arise during the pilot implementation.
- Update the VDM based on feedback and performance data to enhance its functionality and reliability.

#### **Reporting and Documentation:**

- Prepare progress reports and documentation detailing the implementation process, challenges encountered, and solutions applied.
- Document the outcomes of the pilot implementation, including any improvements needed and lessons learned.
- Provide a final report summarizing the results of the pilot phase and recommendations for broader implementation and scaling of the VDM.

### **5. Expected Outcome and Deliverables**

**Diagnostic Report:** Identification of two candidate procedures in Sonora and Tamaulipas for VDM implementation and Definition of the data-providing and data-consuming entities involved.

**VDM Implementation Strategy:** Detailed document describing the adaptation and customization of the VDM for the selected procedures. Contains an action plan for VDM implementation in each state, including a timeline, required resources, and execution phases.

**Technical Progress Report:** Periodic reports on the progress of VDM implementation, including any necessary adjustments to system adaptation. Documentation of technical support and maintenance provided during the implementation.

## Progress and Final Implementation Report:

- Progress Report of Pilot implementation in Sonora
- Progress Report of Pilot implementation in Taumalipa
- Final Report of Pilot implementation in Sonora
- Final Report of Pilot implementation in Taumalipa
- Recommendations for replicating and scaling the VDM in other states and documentation of lessons learned and suggested improvements for the tool.

## 6. Project Schedule and Milestones

	<u>Months</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>
<b>Diagnostic Assessment and Planning</b>	Kick off meeting										
	Diagnostic Assessment Report detailing the existing data management systems, identified procedures, and entities involved										
<b>Strategy development</b>	Draft implementation strategy										
<b>Pilot Implementation Phase</b>	Report of Pilot implementation in Sonora										
	Report of Pilot Implementation in Taumalipa										
<b>Final Evaluation and Reporting</b>	Progress and Final Reports										
	Recommendation and Lessons Learned										

## 7. Acceptance Criteria

**Submission Method:** Deliverables must be submitted electronically to the supervisor via email or a secure project management platform as specified in the contract.

**Submission Format:** Deliverables should be in the format agreed upon in the contract (e.g., PDF, Word, Excel). Each submission must include all required documentation and supporting materials.



**Evaluation Timeline:** The supervisor will have 10 business days to evaluate each deliverable from the date of submission.

**Acceptance Notification:** Upon satisfactory completion of the review and any necessary revisions, the project manager or review committee will issue a formal acceptance email. This notification will confirm that the deliverable meets the established criteria and is accepted.

**Authorized Personnel:** The project manager or a designated authority within the contracting agency will have the authority to accept or reject deliverables.

## 8. Supervision and Reporting

**8.1.** the consulting firm will be reporting to Lead Specialista Javier Ramirez at the IFD-ICS

## 9. Schedule of Payments

**9.1.** 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.

**9.2.** The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

Payment Schedule	
Deliverable	%
<b>Diagnostic Report:</b> Identification of two candidate procedures in Sonora and Tamaulipas for VDM implementation and Definition of the data-providing and data-consuming entities involved.  1.	15%
<b>VDM Implementation Strategy:</b> Detailed document describing the adaptation and customization of the VDM for the selected procedures. Contains an action plan for VDM implementation in each state, including a timeline, required resources, and execution phases.	15%
<b>Technical Progress Report:</b> Periodic reports on the progress of VDM implementation, including any necessary adjustments to system adaptation. Documentation of technical support and maintenance provided during the implementation.	15%
Progress Report of Pilot implementation in Sonora	20%
Progress Report of Pilot Implementation in Tamaulipas	
Final Report of Pilot implementation in Sonora	20%
Final Report of Pilot Implementation in Tamaulipas	
Recommendations for replicating and scaling the VDM in other states and documentation of lessons learned and suggested improvements for the tool.	15%
<b>TOTAL</b>	<b>100%</b>

