



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

**PROJECT NAME:** Paving the Pan American Highway for Digital Health

**SELECTION PROCESS #:** RG-T4546-P003

**SELECTION METHOD:** Full Competitive

**COUNTRY:** Regional

**SECTOR OR DEPARTMENT:** Social Protection and Health

**TC NAME:** RG-T4546

**FUNDING – TC #:** ATN/JF-21093-RG

**LINK TO TC DOCUMENT:** [IDB | Paving the Pan American Highway for Digital Health \(iadb.org\)](https://www.iadb.org)

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

Effective July 1, 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: *1<sup>st</sup> of October, 2024*, 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.

**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: [Adrián Hernández Pascual \(adrianh@iadb.org\)](mailto:Adrián_Hernández_Pascual@iadb.org)

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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, 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.



## 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

- **Objectives:** The primary aim is to create a digital certification platform that includes compliance testing services, training methodologies, and implementation of tools for health interoperability. This will facilitate cross-border healthcare and enhance data exchange among member countries.
- **Scope of Services:**
  - Develop and deploy a testing infrastructure for Proofs of Concept (PoCs) and use cases defined for PH4H Connectathons.
  - Provide configuration and support services for testing events and the certification platform.
  - Execute training cycles focused on health interoperability tools and profiles.
- **Key Activities:**
  - Develop a comprehensive work plan for multiple regional and national Connectathons.
  - Provide training and onboarding materials for participants.
  - Lead the implementation of testing events and generate detailed reports on outcomes.
- **Expected Outcomes and Deliverables:**
  - Improved interoperability and compliance with international standards across the region.
  - Specific deliverables include a comprehensive work plan, cloud-based certification platform, training materials, and reports on Connectathon results.
- **Project Schedule and Milestones:**
  - A 36-month work plan with specific milestones for each Connectathon event.

**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: **\$280,000**

### ***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

### TERMS OF REFERENCE

Certification platform and compliance testing services of digital applications for the  
Pan-American Highway for Digital health

Regional

ATN/JF-21093-RG

RG-T4546

<https://www.iadb.org/en/project/RG-T4546>

*Paving the Pan American Highway for Digital Health*

#### 1. Background and Justification

The COVID-19 pandemic had a significant impact on Latin America and the Caribbean (LAC) region, accounting for a high number of cases and deaths compared to its population. According to official data, LAC accounted for 17 percent of reported COVID-19 cases and 29 percent of confirmed deaths, despite having only 8 percent of the world's population (Savedoff et al., 2022). The economic consequences of the pandemic were also substantial. The World Bank estimated a 6.9% decline in regional Gross Domestic Product (GDP) in 2020 (Savedoff et al., 2022).

The challenges exposed by the pandemic include inadequate data use and access, informal markets for health certificates, low vaccination coverage, and a lack of coordination and interoperability in digital health initiatives. These challenges hinder the exchange of critical health data and limit cross-border healthcare services, exacerbating the situation. The Pan American Health Organization (PAHO) has emphasized the vulnerability in the region caused by the lack of sustainable integrated and interoperable information systems for health. Access to timely and accurate information during public health emergencies is crucial, but it has been a challenge in the region. Previous research on emergencies like Ebola, Cholera, and MERS showed that insufficient data use and lack of access to quality data were common challenges (Park et al., 2020). The lack of coordination and interoperability in digital health initiatives further hindered the exchange of crucial health data and limited cross-border healthcare services in LAC (PAHO, 2021).

**Interoperability and data exchange among countries in the region are crucial for a coordinated and agile response in times of need** (World Health Organization - Global Vaccine Action Plan 2011-2020, 2016). The establishment of regional agreements for health information exchange can optimize resource management, aid public health research, and strengthen disaster response (Bagolle et al., 2022). In the LAC region, there is a pressing need for equitable access to healthcare and inclusive digital health solutions. The Principle of Inclusive Digital Health was approved in 2021, emphasizing appropriate access, digital skills, and usability in technological solutions (PAHO, 2021).

To address these challenges, **regional agreements and data exchange initiatives have been prioritized**. For example, the Roadmap for the Digital Transformation of the Health Sector in the Region of the Americas aims to adopt and implement interoperable digital health solutions. The [RELACSYS 4.0](#) event and the [2nd Regional LACPASS Connectathon](#) demonstrated successful data exchange among sixteen countries, including digital vaccine certificates and critical clinical information.

Along with these initiatives and agreements, deep collaborations have been established to improve digital health in the LAC region. Collaboration between the IDB and PAHO has led to the development of national strategic plans and the identification of investment needs in multiple countries, as well as the implementation of standards-based digital COVID-19 Certificates. In addition, the adoption of digital transformation tools and cross-border data exchange for public health have been promoted. These initiatives are fundamental to achieving inclusive and equitable digital health in the region, overcoming inequality barriers based on income, gender, race and ethnicity. Currently, efforts are being made in the building of a Pan-American Highway for digital health that can improve

public health and empower patients to securely access and share their health data across borders.

To ensure that systems and applications that wish to share data through the Pan-American Highway for Digital health (PH4H) can do so in a safe, secure, and efficient way, it is necessary to ensure that they confirm to the interoperability standards and specifications agreed upon with countries.

## **2. Objectives**

In the context of transborder healthcare interoperability, to provide a digital certification platform with a compliance testing services, training process methodology, a deployment and implementation of testing tools and health interoperability integration profiles, using defined standards and specifications, and implement connectathon services for the country health information systems of the PH4H members/participants and observer countries.

## **3. Scope of Services**

1. Develop and deploy a platform and test infrastructure for Proofs of concept (PoCs) and uses cases defined for PH4H Connectathon tests.
2. Develop and deploy documentation, libraries, components and services of the test platform as required for the PH4H preconnectathon and connectathon.
3. Provide configuration, operation and support services for proof-of-concepts or pre-project testing.
4. Provide configuration, operation and support services for PH4H Connectathons.
5. Execute training cycles at different levels related to health interoperability tools and profiles associated with the PH4H
6. Elaborate technical documents, guidelines and reports associated with the BPR, in Spanish, English, and Portuguese.

## **4. Key Activities**

To achieve the objective, the contractor shall carry out the following activities:

- Develop workplan aligned to the goals and objectives of the PH4H to support 3 regional PH4H connectathons and 1 National cross-sector connectathon
- Develop on-boarding and outreach materials for connectathon participants, explaining the benefits and process of participating in the connectathon
- Provide training to countries participating in connectathons, regarding both technical interoperability aspects (standards, profiles, etc) relevant to the use cases of the interoperability platform, as well as international experiences with similar use cases.
- Development and implementation of pre-test sandbox for the participating countries.
- Provision of Configuration, operation, and support services for Proof-of-Concept Platform and 3 PH4H Regional Conectathons.
- Provision of Configuration, operation, and support services for Proof-of-Concept Platform and 1 national cross-sector Conectathons.
- Development of technical documents, specification documents and connectivity guides.
- Produce detailed reports and presentations for each Connectathon country participant, as well overall reports with the results of the event

- Presentation of results and promotion of events in international forums

## 5. Expected Outcome and Deliverables

The expected outcome of this consultancy is improved regional and intersectorial interoperability and system conformance to international standards and specifications for the PH4H. Specific deliverables include:

### 1. **Deliverable 1 - Workplan and Methodology:**

- Develop a workplan, methodology and budget for 36 months of services and three regional connectathons in the LAC region, as well as 1 national connectathon for intersectorial interoperability (Health, social protection, education, etc). Include mapping of key stakeholders for testing events and potential outlets for dissemination of results internationally.

### 2. **Deliverable 2 - Infrastructure and Support:**

- Deploy cloud version of a certification platform for testing process defined in the uses cases selected for the PH4H, and a sandbox as a cloud service for each annual connectathon for 36 months. Each connectathon is cumulative, meaning tracks from previous events will be made available in each event. Draft schedule + Use cases:
  - September 2025: PH4H 4<sup>th</sup> Regional Connectathon. Focus on Migrant Health (IPS for migrants), as well as continuity of care - IPS in general, vaccine credentials, and telehealth – proposed location -El Salvador
  - October 2025: 1<sup>st</sup> National LAC Intersectorial Connectathon. Focus on data sharing across social sectors. Proposed location- Peru
  - Q3 2026: PH4H 5<sup>th</sup> Regional Connectathon: Focus on Public Health (data for health surveillance, data for health research
  - Q4 2027: PH5H 6<sup>th</sup> Regional Connectathon: Other use cases, such as health worker credentialing
- Provide maintenance, training services and support for 36 months.
- After the end of the contract, if maintenance is not renewed, the provider will transfer the certification platform available version for “on premises” or “private cloud” deployment for the PH4H. This transfer will not incur any additional costs.

### 3. **Deliverable 3 – Preparatory Studies and Content:**

- Undergo necessary studies for each set of use cases required per event
- Review implementation guides for PH4H and National Connectathon and support update of guides in English and Spanish
- Update training content and platform for each regional and national event

### 4. **Deliverable 4 - Training:**

- Provide training on certification platform - Monitors - Tooling and usage for uses cases defined (2hrs hands on workshops).
- Training on certification platform – PH4H members track (online 2 hrs hands on workshops) – SUTs.
- Training on international standards and profiles (online 3X2 hrs workshops): According to the needs of each Connectathon event.
- 3 webinars for Participants (onboarding) and 3 persons on 3 days onsite for Connectathon to support monitors and other activities.
- Issue digital certificates for all trained participants according to PH4H guidelines.



## 5. Deliverable 5 - Testing Events:

- Lead implementation of Pre Conectathon and Conectathon events. Tests must cover main use cases defined for the PH4H project
- Establish Testing content for PH4H testing event.
- Provide testing services to verify transactions according to implementation guide

## 6. Deliverable 6 - Reports:

- Generate a set of Reports and lessons learned associated with the results of the PH4H regional Connectathon. Provide information at the regional level, as well as individual country reports for each test case.

## 6. Project Schedule and Milestones

6.1. Overall workplan for 36 months and detailed workplan for 12 months

### 6.2. 1<sup>st</sup> PH4H Regional Connectathon (year 1)

- 6.2.1.1<sup>st</sup> Regional PH4H connectathon Infrastructure updated
- 6.2.2.1<sup>st</sup> connectathon preparatory studies and content completed
- 6.2.3.1<sup>st</sup> connectathon training materials completed
- 6.2.4.1<sup>st</sup> Connectathon implemented
- 6.2.5.1<sup>st</sup> connectathon report published

### 6.3. 1<sup>st</sup> National LAC Social Sector Connectathon (year 1)

- 6.3.1. 2<sup>nd</sup> connectathon Infrastructure updated
- 6.3.2.2<sup>nd</sup> connectathon preparatory studies and content completed
- 6.3.3.2<sup>nd</sup> connectathon training materials completed
- 6.3.4.2<sup>nd</sup> Connectathon implemented
- 6.3.5.2<sup>nd</sup> connectathon report published

### 6.4. 2<sup>nd</sup> PH4H Regional Connectathon (year 2)

- 6.4.1. Year 2 workplan
- 6.4.2.2<sup>nd</sup> connectathon Infrastructure updated
- 6.4.3.2<sup>nd</sup> connectathon preparatory studies and content completed
- 6.4.4.2<sup>nd</sup> connectathon training materials completed
- 6.4.5.2<sup>nd</sup> Connectathon implemented
- 6.4.6.2<sup>nd</sup> connectathon report published

### 6.5. 3<sup>rd</sup> PH4H Regional Connectathon (year 3)

- 6.5.1.3<sup>rd</sup> Year 3 workplan
- 6.5.2. connectathon Infrastructure updated
- 6.5.3.3<sup>rd</sup> connectathon preparatory studies and content completed
- 6.5.4.3<sup>rd</sup> connectathon training materials completed
- 6.5.5.3<sup>rd</sup> Connectathon implemented
- 6.5.6.3<sup>rd</sup> connectathon report published

### 6.6. Final Report and Lessons Learned

- 6.6.1. Consolidation of all technical documentation and connectathon results
- 6.6.2. Transfer of conformance testing platform to local server

## 7. Reporting Requirements





The consulting company will submit the deliverables for approval, according to the following criteria:

- 7.1. Every draft and report must be prepared in English and Spanish and submitted to the Bank in an electronic file. The report should include the cover, main document, and all annexes. These files must also be in an -editable- electronic format used by the Bank, such as one of the MS Office, PDF, JPG and/or TIFF formats.
- 7.2. If reports are to be published on the Bank's website, they should follow the standard IDB format.
- 7.3. The deliverables are complete, accurate, and relevant to the scope and objectives of the project.
- 7.4. The deliverables are consistent, coherent, and clear in their content, format, and language.
- 7.5. The deliverables are timely, responsive, and aligned with the project schedule and milestones.
- 7.6. The deliverables are compliant with the international standards and best practices for digital health and data protection.
- 7.7. The deliverables are satisfactory, useful, and beneficial to the stakeholders and beneficiaries of the project.

## **8. Acceptance Criteria**

- 8.1. The consulting firm will be reporting to the project Team Lead Jennifer Nelson, who will review and / or consult with the PH4H Steering Committee as needed and will provide comments to any reports, approve reports, documents and work, and / or any instructions for changes.
- 8.2. It shall be the consulting firm's responsibility to ensure that such reports are submitted to the Bank.
- 8.3. The frequency of communication will depend on the need for comments and approvals agreed upon at the beginning of the consultancy. It will be the responsibility of the Firm to ensure that such meetings take place.

## **9. Other Requirements**

The consulting firm is required to have:

- 9.1. At least 8 years of experience in similar projects.
- 9.2. Personnel assigned to this consultancy must have at least 5 years of experience working with the consulting firm on similar projects in the region.
- 9.3. Travel permitted according to the work plan.

## **10. Supervision and Reporting**

- 10.1. The consulting firm will be reporting to the project Team Lead Jennifer Nelson, who will review and / or consult with the PH4H Steering Committee as needed and will provide comments to any reports, approve reports, documents and work, and / or any instructions for changes.
- 10.2. It shall be the consulting firm's responsibility to ensure that such reports are submitted to the Bank.
- 10.3. The frequency of communication will depend on the need for comments and approvals agreed upon at the beginning of the consultancy. It will be the responsibility of the Firm to ensure that such meetings take place.

## 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.

<b>Payment Schedule</b>	
<b><i>Deliverable</i></b>	<b>%</b>
1. Overall workplan for 36 months and detailed workplan for 12 months	10%
2. Infrastructure, Training Materials and Preparatory studies completed for 1 <sup>st</sup> regional connectathon	10%
3. 1 <sup>st</sup> regional connectathon report	10%
4. Infrastructure, Training Materials and Preparatory studies completed for 1 <sup>st</sup> National Social Sector connectathon	10%
5. 1 <sup>st</sup> National Social Sector connectathon report	10%
6. Infrastructure, Training Materials and Preparatory studies completed for 2 <sup>nd</sup> Connectathon	10%
7. 2 <sup>nd</sup> connectathon report	10%
8. Infrastructure, Training Materials and Preparatory studies completed for 3 <sup>rd</sup> connectathon	10%
9. 3 <sup>rd</sup> connectathon report	10%
10. Final report and documentation and transfer of server	10%
<b>TOTAL</b>	<b>100%</b>

- 11.3.** The total budget allocated for the contract corresponds to USD\$280,000 which will be disbursed according to the payment schedule table.