

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

PROJECT NAME: Report on the progress and challenges of innovate poverty reduction slum upgrading approaches

SELECTION PROCESS #: BR-T1658-P002

SELECTION METHOD: Simplified Competitive

COUNTRY: Brazil

SECTOR OR DEPARTMENT: Housing and Urban Development Division, CSD/HUD

TC NAME: BR-T1658

FUNDING – TC #: ATN/OC-21620-BR

LINK TO TC DOCUMENT: [EZIDB0003188-1829290257-26](https://www.idb.org/oc/EZIDB0003188-1829290257-26)

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.

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: *August 20th, 2025*, 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.

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: *Yader Hernandez*,

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.



yaderh@iadb.org

Inter-American Development Bank

Division: *Housing and Urban Development Division, CSD/HUD]*

Attn: *Washington Fajardo, Sector Senior Specialist – Housing & Urban Development]*

1300 New York Ave, NW

Washington DC, 20577

Tel: *[+202 623 1000]*

E-mail: *Washingtonm@iadb.org]*

Web site: www.iadb.org

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

Section 3. Consulting Services

3.1 The consulting services include **to develop a comprehensive, evidence-based report that identifies and analyzes innovate institutional, financial, and operational arrangements for housing and urban development strategies integrating poverty reduction and social inclusion.**

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

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

3.3 Estimated budget: **USD 70,000**

Annex A. Draft Terms of Reference

Last Updated 03/24/2025

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

ANNEX A – Terms of reference

1. Background and Justification

- 1.1.** According to the Brazilian Institute of Geography and Statistics (IBGE), approximately 16,4 million people live in favelas, facing inadequate housing, limited public services, and restricted economic opportunities. The Multidimensional Poverty Index (MPI) highlights overlapping deprivations in education, health, and living conditions, exacerbated by high unemployment, poor sanitation, and restricted mobility, exacerbating social exclusion. According to the IBGE (2022), 3.6 million people live in favelas in the State of São Paulo, where poor infrastructure and social vulnerability hinder sustainable development and poverty alleviation efforts. Given the spatial concentration of poverty and vulnerability in these areas, integrated territorial strategies are crucial for lasting change.
- 1.2.** Although many slum upgrading programs in Latin America and the Caribbean (LAC) have been quite successful in improving infrastructure and transforming vulnerable neighborhoods (Magalhães et al, 2016), there is growing consensus among practitioners and community groups that these urban development programs have yet to fully leverage their potential to reduce poverty and drive social and economic development. Community organizations, NGOs, and impact-driven businesses are already pursuing these broader objectives, and governments across LAC have expressed interest in analyzing their results to inform support and scaling efforts. The involvement and leadership of community groups in slum upgrading initiatives holds significant promise, not only for scaling up efforts but also for advancing poverty reduction (Satterthwaite and Mitlin, 2014).
- 1.3.** To explore and address these challenges, the Inter-American Development Bank (IDB) is supporting innovative housing and urban integration approaches with transformative impacts on social inclusion and poverty reduction. The Technical Cooperation BR-T1658 aims to strengthen poverty reduction and social inclusion components in housing and urban development plans and operations. The TC will help the State of São Paulo Government explore, assess, design, and help scale promising social innovations in slum upgrading to improve the execution of housing, social inclusion, and poverty reduction initiatives. Through its three-phase methodology the TC will engage public, social, and private stakeholders to design scalable, data-driven interventions. It is expected that the TC will generate crucial knowledge products informing the State of São Paulo's urban development and housing policies leading to a comprehensive urban development program with actionable plans for the Baixada Santista-São Paulo-Jundiaí-Campinas region.
- 1.4.** This procurement process seeks to hire a consulting firm to develop a report summarizing progress and challenges of slum upgrading approaches and poverty reduction through a spatial lens. The report will identify and analyze innovative institutional, financial, and operational arrangements that have successfully addressed persistent barriers to integrating poverty reduction and social inclusion into urban development initiatives. It is expected to provide a structured review of relevant literature and policy frameworks, propose a clear analytical framework, and assess both challenges and enabling factors. The analysis will be grounded in four illustrative case studies. Based on these findings, the report should offer actionable recommendations to inform future urban development strategies.
- 1.5.** Moreover, it is expected that the production of this report and its associated activities such as presentations, roundtables, and workshops, will result in an exploration of potential synergies between community-led slum upgrading initiatives, public policies and programs, and financing mechanisms, offering specific recommendations for multilateral development banks, governments, and community organizations. Through exploring and evaluating different housing and urban upgrading strategies, the IDB seeks to identify scalable solutions that can be adapted across other informal settlements. This analysis will assess the feasibility and scalability of these approaches, identifying ways in which the

IDB can assist national and subnational governments in scaling these efforts.

2. Objectives

- 2.1. The overall objective of this consultancy is to develop a comprehensive, evidence-based report that identifies and analyzes innovative institutional, financial, and operational arrangements for housing and urban development strategies integrating poverty reduction and social inclusion.
- 2.2. The specific objectives of this consultancy are to (i) generate knowledge that can help increase effectiveness of housing and urban development programs, and (ii) to help the State Government of São Paulo to design scalable, data-driven housing and urban development interventions to reduce urban poverty in the Baixada Santista-São Paulo-Jundiaí-Campinas region.

3. Scope of Services

3.1. Preparation of a Comprehensive Report on Housing and Urban Development Initiatives for Poverty Reduction. The report will include the following components:

- 3.1.1. **Literature Review and Analytical Framework:** Provide a synthesis of key perspectives on the effectiveness and adequacy of urban development programs in addressing poverty. Identify major conceptual challenges, key variables for analysis, and common data collection methodologies.
- 3.1.2. **Policy Review of Global South Initiatives:** Conduct a review of housing and urban development policies aimed at poverty reduction in the Global South, with a particular focus on Latin America and the Caribbean. Present aggregate data, summarize historical approaches, and highlight key lessons learned and regional variations.
- 3.1.3. **Assessment of Progress and Remaining Challenges:** Based on the literature and policy reviews, offer a structured analysis of achievements to date and persistent challenges. Propose a methodology to evaluate the appropriateness of spatial approaches to poverty—i.e., when urban development strategies are more effective than traditional social policy interventions.
- 3.1.4. **Case studies:** Include four in-depth case studies (i) Favela Marte in São José do Rio Preto; (ii) Dique da Vila Gilda in São Vicente/Santos; (iii) one global South initiative; (iv) one IDB initiative.
- 3.1.5. **Lessons Learned and Strategic Recommendations:** Draw practical insights from the analysis to provide actionable recommendations. These should address how to overcome implementation barriers, leverage opportunities, and suggest policy directions, potential partnerships, and strategies for effective execution.

3.2. Active participation in workshops, roundtable discussions, and presentations: This consultancy is part of a broader research and knowledge-generation agenda led by the IDB, in collaboration with the State Government of São Paulo, other subnational governments, and key stakeholders. As such, the selected firm will be expected to actively participate in related activities, including workshops, roundtable discussions, and other knowledge-sharing events. The firm will be required to prepare and present findings in at least two workshops, and design interactive activities to gather stakeholder feedback. This feedback must be systematically documented and integrated into the final deliverables.

4. Key Activities

- 4.1. Prepare a detailed work plan and data collection methodology.
- 4.2. Conduct a comprehensive literature and policy review on the integration of poverty reduction and social inclusion in urban development programs developed in the past 25 years in the Global South, especially in LAC.
- 4.3. Develop a framework of analysis to guide the study.
- 4.4. Identify and analyze key barriers and opportunities (progress and challenges) for integration in housing and urban development projects.

- 4.5. Select and document four case studies illustrating innovative arrangements and experiences, one of them being part of an IDB loan.
- 4.6. Prepare a draft report including all required components: literature and policy review, analytical framework, barrier and opportunity (progress and challenges) analysis, case studies, and recommendations.
- 4.7. Submit the final report incorporating feedback from IDB, the State Government of São Paulo, and other stakeholders.
- 4.8. Actively participate in coordination meetings and knowledge-sharing events organized by the IDB and partners.
- 4.9. Organize and facilitate at least two workshops with stakeholders, including the design and implementation of interactive activities and the systematization and integration of feedback into the final report.
- 4.10. Deliver at least four formal presentations of findings to the IDB, the State Government of São Paulo, and other stakeholders.
- 4.11. Prepare communication materials (e.g., slide decks, executive summaries) tailored to different audiences.

5. Expected Outcome and Deliverables

- 5.1. The expected outcome from this consultancy is a comprehensive report on housing and urban development strategies integrating poverty reduction and social inclusion, with an in-depth analysis of current innovative approaches and actionable recommendations for key stakeholders. Deliverables include:
 - 5.1.1. Deliverable 1: Initial report, including methodology and work plan.
 - 5.1.2. Deliverable 2: Mid-term report: summarizing findings, literature and policy review, including framework of analysis.
 - 5.1.3. Deliverable 3: Final report with full analysis of progress and challenges, lessons learned and actionable recommendations.

6. Project Schedule and Milestones

- 6.1. The consulting firm will keep to the following schedule:
 - 6.1.1. **Milestone 1:** Initial report and Work Plan 2 weeks after contract signature.
 - 6.1.2. **Milestone 2:** Mid-term report - 3 months after contract signature.
 - 6.1.3. **Milestone 3:** Final report – 6 months after contract signature.

7. Reporting Requirements

- 7.1. The consulting firm will submit the following reports:
 - 7.1.1. Initial report: detailing the methodology, work plan, and timeline.
 - 7.1.2. Progress Reports: regular updates every month on progress made, challenges encountered, and solutions proposed.
 - 7.1.3. Final Report: a complete document outlining the analysis of barriers and opportunities, along with specific recommendations for policy and programmatic action.
- 7.2. All reports will be submitted in Portuguese and must include both a written version and a presentation to the IDB. Final Report should also be submitted in English.

8. Acceptance Criteria

- 8.1. Deliverables will be reviewed and accepted based on the following criteria:
 - 8.1.1. Clarity and Quality: Reports are clear, well-structured, and based on sound analysis.
 - 8.1.2. Actionability: Recommendations are practical, relevant, and aligned with the objectives of the project.



8.1.3. Timeliness: Reports are delivered according to the agreed-upon schedule.

8.1.4. The IDB Team Leader will be responsible for accepting or rejecting the deliverables.