

RG-T4860

TERMS OF REFERENCE

Specialized Firm for Market Deployment, User Community Building, and Joint Outreach Strategies

Regional

RG-T4860

TECHNICAL COOPERATION NAME: AmazoniaForever360+ Phase 2: Regional Scaling and Country Level Territorial Intelligence

1. Background and Justification

In November 2025, AmazoniaForever360+ was officially launched at COP30 in Belém, marking the transition from platform development to public deployment. The platform evolved from Amazon GRID (RG-T4174), a foundational technical cooperation implemented from 2023-2025 that established core territorial data infrastructure and first user experience.

AmazoniaForever360+ democratizes access to complex territorial intelligence across Amazonia through three integrated tools: Report (intuitive territorial report generation), Grid (hexagonal spatial analysis system), and Studio (advanced spatial analysis environment). The platform integrates over 140+ territorial indicators across eight thematic categories, providing AI-powered automated report generation and spatial analysis tools.

This Phase 2 represents a strategic shift from development to market deployment and user community building. Having successfully launched at COP30, AmazoniaForever360+ now requires focused market deployment strategies to establish itself as the definitive territorial intelligence platform for Amazonia through systematic user engagement across regional, global, and IDB Group networks.

The platform serves diverse stakeholders across Amazonia: government entities, researchers, environmental organizations, multilateral institutions, bioeconomy sector businesses, indigenous and traditional communities, policy makers, donors and investors, and the broader public. Strategic integration with ACTO's Amazon Regional Observatory (ARO) creates opportunities to converge user universes and establish a unified regional territorial intelligence ecosystem.

This consultancy addresses the critical market deployment and user community building activities essential for scaling AmazoniaForever360+ beyond its initial launch phase, working in close coordination with IDB's External Affairs and Communications Division (EXC/DCC) to ensure institutional alignment and brand coherence.

2. Objectives

The Consultancy will design and implement comprehensive market deployment and user community building strategies for AmazoniaForever360+, specifically: developing and executing market deployment programs with measurable user adoption across target segments; creating user segmentation strategies and targeted value propositions for diverse stakeholder groups; designing and coordinating regional road show programs; implementing user onboarding and engagement mechanisms; and developing joint outreach strategies that converge AmazoniaForever360+ and ACTO Amazon Regional Observatory user universes to establish a unified regional knowledge network.

3. Scope of Services

This consultancy will contribute to the following components of the AmazoniaForever360+ Phase 2 project:

COMPONENT 1: Market Deployment and User Community Building

- Development of market deployment strategy with user segmentation and targeted value propositions for diverse stakeholder groups
- Design and coordination of regional outreach programs leveraging IDB country offices and institutional networks
- Implementation of user onboarding, engagement, and retention mechanisms
- Development of training products and capacity building materials in collaboration with Knowledge and Learning Division (KLD/SDI)

COMPONENT 3: ACTO Amazon Regional Observatory Integration

- Design and implementation of joint outreach strategy converging AmazoniaForever360+ and ACTO Amazon Regional Observatory user universes
- Development of coordinated campaigns and communication materials for unified regional positioning

The firm will work in close coordination with CSC/ACU (Amazon Unit), EXC/DCC (External Affairs and Communications Department), KLD/SDI (Knowledge and Learning Division) for training and capacity building activities, IDB Country Offices, and ACTO to ensure institutional alignment and effective deployment across the region.

4. **Methodology**

The consulting firm will employ a strategic market deployment approach with stakeholder-centered design, data-driven user segmentation, and coordinated regional execution. The approach will include:

- Phased deployment approach with clearly defined milestones tied to user adoption metrics
- Comprehensive stakeholder mapping and user segmentation analysis across Amazonian countries
- Development of targeted value propositions for each identified user segment based on specific needs and use cases
- Regular coordination meetings with CSC/ACU, EXC/DCC, and IDB Country Offices to ensure aligned deployment activities
- Data-driven approach with continuous monitoring of user adoption metrics, engagement indicators, and community growth patterns
- Coordination with ACTO for joint outreach activities and converged user universe development
- Collaboration with KLD/SDI for development of training products and capacity building materials
- Collaborative design approach for all marketing materials and communication campaigns in alignment with IDB institutional branding and EXC/DCC guidelines
- Multilingual approach ensuring materials and strategies are culturally appropriate for diverse Amazonian contexts (English, Spanish, Portuguese)

5. Key Activities

Phase 1: Research and Strategy Development (Months 1-4)

- Comprehensive stakeholder mapping across all eight Amazonian countries
- User segmentation analysis identifying priority target groups and their specific territorial intelligence needs
- Development of targeted value propositions for each user segment (government entities, researchers, civil society, indigenous communities, bioeconomy sector, investors)
- Design of comprehensive market deployment strategy with measurable user adoption targets
- Regional road show program design coordinated with IDB Country Offices
- Development of user onboarding and engagement frameworks
- Design of training and capacity building approach in collaboration with KLD/SDI

Phase 2: Deployment Execution and Community Building (Months 5-8)

- Implementation of regional road show program across priority countries
- Execution of targeted outreach campaigns for each user segment
- Launch of user onboarding processes and engagement mechanisms
- Development of marketing materials and communication campaigns in coordination with EXC/DCC
- Initial user acquisition activities with tracking of adoption metrics
- Establishment of user feedback mechanisms and community engagement platforms

Phase 3: ACTO Users Markets Integration and Joint Outreach (Months 9-12)

- Design and implementation of joint outreach strategy with ACTO Amazon Regional Observatory
- Development of coordinated marketing campaigns converging both platform user markets
- Creation of joint communication materials and integrated user onboarding processes
- Implementation of cross-platform user engagement mechanisms
- Establishment of unified regional knowledge network positioning
- Final user community consolidation activities and sustainability planning
- Comprehensive reporting on user adoption metrics and community growth indicators

6. Expected Outcomes and Deliverables

Deliverable 1: Inception Report and Stakeholder Mapping

Comprehensive inception report detailing project approach, methodology, work plan with timeline and milestones, resource allocation, coordination mechanisms with CSC/ACU and EXC/DCC, and quality assurance protocols. Initial stakeholder mapping across Amazonian countries identifying key user segments, institutional partners, and deployment opportunities. Preliminary analysis of market landscape and competitive positioning.

Deliverable 2: Market Deployment Strategy and User Segmentation Analysis

Comprehensive market deployment strategy document including user segmentation analysis, targeted value propositions for key stakeholder groups, user acquisition and engagement strategies, regional outreach program design coordinated through IDB Country Offices, and training and capacity building framework developed in collaboration with KLD/SDI. Strategy includes measurable adoption targets and implementation roadmap.

Deliverable 3: Joint Outreach Strategy with ACTO and Campaign Materials

Joint outreach strategy document converging AmazoniaForever360+ and ACTO Amazon Regional Observatory user universes. Strategy includes coordinated campaign design, integrated user onboarding approaches, and cross-platform engagement mechanisms. Deliverable includes complete set of multilingual marketing and communication materials (English, Spanish, Portuguese) developed in coordination with EXC/DCC and aligned with institutional branding guidelines.

Deliverable 4: Implementation Reports and User Adoption Metrics

Comprehensive final report documenting deployment and outreach activities during the contract period. Report includes implementation documentation, user adoption metrics and engagement indicators across target segments, community growth analysis, joint outreach activities with ACTO, challenges and solutions, lessons learned, and recommendations for ongoing community building and platform sustainability. Complete documentation of coordination with CSC/ACU, EXC/DCC, KLD/SDI, IDB Country Offices, and ACTO.

7. **Project Schedule and Milestones**

Deliverable 1: 60 days after signing the contract (Month 2)

Deliverable 2: 4 months after signing the contract

Deliverable 3: 8 months after signing the contract

Deliverable 4: 12 months after signing the contract

8. Reporting Requirements

All reports and deliverables must be sent to the Bank in electronic file format, in Word, Excel, PowerPoint, or other formats subsequently agreed between the parties. All marketing materials and communication campaigns must be delivered in editable formats with source files.

The firm will provide monthly progress reports to CSC/ACU documenting deployment activities, user acquisition metrics, outreach campaign execution, and coordination activities with stakeholders. Regular coordination meetings will be held with the Amazon Unit and EXC/DCC to ensure alignment with institutional communication strategies.

9. Acceptance Criteria

Each deliverable will be sent to the IDB Project Team Leader (CSC/ACU). Acceptance must be received before a milestone is considered completed. Acceptance will be made formally, by email, and will not exceed fifteen (15) days after receipt.

Strategy documents and campaign materials will be evaluated based on strategic coherence with project objectives, alignment with IDB institutional branding guidelines, appropriateness for target audiences, feasibility of implementation, quality of user segmentation analysis, measurability of proposed metrics, and coordination with EXC/DCC communication standards.

10. Qualifications and Experience Requirements

For the development of this consultancy, a specialized consulting firm with a minimum of 8 years of experience in strategic market deployment, user community building, and outreach campaigns for digital platforms or knowledge products is required.

The firm must demonstrate that it has:

- Proven experience in designing and implementing market deployment strategies for digital platforms, knowledge products, or territorial intelligence systems
- Demonstrated expertise in user segmentation analysis and development of targeted value propositions for diverse stakeholder groups
- Experience in coordinating regional deployment programs across multiple countries, particularly in Latin America
- Track record of successful user community building and engagement programs with measurable adoption results
- Experience designing joint outreach strategies and coordinated marketing campaigns involving multiple institutional partners
- Experience working with multilateral development banks or international organizations on knowledge dissemination and stakeholder engagement
- Understanding of Amazonian regional context, indigenous communities' engagement, and environmental conservation stakeholders
- Capacity to develop culturally appropriate materials and strategies for diverse audiences across different countries

- Multidisciplinary team including strategic marketing specialists, user experience researchers, communication experts, campaign designers, and stakeholder engagement coordinators
- Fluency in English and Spanish; Portuguese language capabilities are required
- References from at least three similar projects involving regional deployment or user community building

11. Supervision and Reporting

Strategic supervision will be provided by the Amazon Unit (CSC/ACU) in coordination with the External Relations Department Communications Division (EXC/DCC). All marketing materials, communication campaigns, and brand positioning activities must be developed in alignment with EXC/DCC institutional guidelines and approved before public deployment.

The firm will coordinate closely with: CSC/ACU as primary strategic supervisor, EXC/DCC for communication strategy alignment and brand coherence, KLD/SDI for training products and capacity building materials, IDB Country Offices for regional deployment and outreach coordination, and ACTO for joint outreach strategy development and implementation.

It is the firm's responsibility to ensure that meetings are conducted and reports are submitted to the IDB according to the agreed schedule.

12. Schedule of Payments

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.

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

Total Contract Amount: USD \$140,000

Contract Duration: 12 months

Payment Schedule	%
<i>Deliverable 1:</i> Inception Report and Stakeholder Mapping (Month 2)	15%
<i>Deliverable 2:</i> Market Deployment Strategy and User Segmentation (Month 4)	25%
<i>Deliverable 3:</i> Joint Outreach Strategy and Campaign Materials (Month 8)	30%
<i>Deliverable 4:</i> Implementation Reports and User Adoption Metrics (Month 12)	30%
TOTAL	100%

RG-T4860

TERMS OF REFERENCE

Technology Firm for Comprehensive Platform Development and Integration

Regional

RG-T4860

TECHNICAL COOPERATION NAME: AmazoniaForever360+ Phase 2: Regional Scaling and Country Level Territorial Intelligence

1. Background and Justification

In November 2025, AmazoniaForever360+ was officially launched at COP30 in Belém, marking the transition from platform development to public deployment. The platform evolved from Amazon GRID (RG-T4174), a foundational technical cooperation implemented from 2023-2025 that established core territorial data infrastructure and first user experience.

AmazoniaForever360+ democratizes access to complex territorial intelligence across Amazonia through three integrated tools: Report (intuitive territorial report generation), Grid (hexagonal spatial analysis system), and Studio (advanced spatial analysis environment). The platform integrates over 140+ territorial indicators across eight thematic categories, providing AI-powered automated report generation and spatial analysis tools.

This Phase 2 represents a strategic shift from development to market deployment and user community building. Having successfully launched at COP30, AmazoniaForever360+ now requires focused technological enhancements to establish itself as the definitive territorial intelligence platform for Amazonia through: (i) AI-powered user experience improvements, (ii) development of Country Territorial Intelligence Hubs with higher resolution data, (iii) strategic integration with ACTO's Amazon Regional Observatory, and (iv) implementation of sustainable hosting infrastructure.

The platform serves diverse stakeholders across Amazonia: government entities, researchers, environmental organizations, multilateral institutions, bioeconomy sector businesses, indigenous and traditional communities, policy makers, donors and investors, and the broader public. IDB staff also utilize the platform for country programming, operational planning, and portfolio monitoring.

2. Objectives

The Consultancy will carry out the comprehensive technological development and integration activities required to scale AmazoniaForever360+ as the definitive territorial intelligence platform for Amazonia, specifically: implementing AI-powered conversational interfaces and user experience enhancements; developing Studio as a fully operational

advanced spatial analysis environment; designing and implementing the Country Territorial Intelligence Hub (CTIH) prototype with dual-scale architecture; establishing technical integration protocols with ACTO's Amazon Regional Observatory; and implementing secure and sustainable hosting infrastructure.

3. Scope of Services

This consultancy will **contribute to the following components** of the AmazoniaForever360+ Phase 2 project:

COMPONENT 1: User Experience and AI Implementation

- Implementation of AI-powered conversational interfaces enabling natural language indicator discovery across all platform tools (Report, Grid, and Studio)
- Platform user experience enhancements based on COP30 launch feedback, optimizing interfaces for both non-technical users and specialized analysts
- Integration of AI capabilities to facilitate intelligent interaction with the territorial indicators database through natural conversation queries

COMPONENT 2: Studio Development and Country Hub Prototype

- Development of Studio as fully operational advanced spatial analysis environment with GIS-like capabilities for non-specialist users
- Implementation of layer manipulation and overlay functionality enabling intuitive analysis of spatial patterns and trends
- Integration of Studio with Grid and Report tools for comprehensive territorial analysis workflow
- Design and implementation of Country Territorial Intelligence Hub (CTIH) prototype platform infrastructure with dual-scale architecture operating at both regional and country levels
- Database adaptation for higher resolution country-specific data while maintaining seamless user experience transition between regional and national analysis

COMPONENT 3: ACTO Integration

- Evaluate integration options between the platform and the Amazon Regional Observatory based on user demand
- Design and implementation of technical integration protocols ensuring system interoperability with ACTO Amazon Regional Observatory (ARO)
- Implementation of comprehensive data sharing agreements and collaborative data management protocols

COMPONENT 4: Hosting Infrastructure

- Operational hosting infrastructure support

The firm will work in close coordination with CSC/ACU (Amazon Unit), TTD/TTR (Digital Transformation Division), participating IDB Country Offices, ACTO technical teams, and national institutions involved in CTIH development.

4. **Methodology**

The consulting firm will employ an agile development methodology with iterative sprints, regular milestone reviews, and continuous stakeholder engagement. The approach will include:

- Phased development approach with clearly defined milestones and deliverables
- Participatory design approach for Country Territorial Intelligence Hub development, involving comprehensive stakeholder engagement with government entities, national institutions, and local partners
- Regular coordination meetings with CSC/ACU and relevant IDB units (bi-weekly technical reviews)
- User-centered design approach with beta testing and feedback integration
- Comprehensive technical documentation throughout development process
- Quality assurance protocols including integration testing and user acceptance testing
- Knowledge transfer sessions to CSC/ACU technical team at key development stages
- Coordination with ACTO technical teams for ARO integration activities
- Three-environment development approach: Development (Dev) for ongoing development work, Staging for business and stakeholder validation, and Production for live platform deployment, ensuring thorough testing and validation before releases

5. **Key Activities**

Phase 1: Design and Planning (Months 1-3)

- Technical architecture validation and detailed design for all components
- AI conversational interface design and natural language processing model selection
- Studio functional specifications and user experience design
- Participatory design workshops for CTIH with stakeholders from government entities, national institutions, and local partners (ongoing process integrated into development)
- CTIH architecture design including dual-scale database structure based on stakeholder input and iterative validation
- ACTO integration protocols design and technical requirements documentation

Phase 2: Initial Development and AI Implementation (Months 4-7)

- Implementation of AI-powered conversational interfaces across platform tools
- Platform user experience enhancements based on COP30 feedback
- Initial Studio development with core spatial analysis capabilities
- Begin CTIH database infrastructure development

Phase 3: Studio Completion and CTIH Development (Months 8-12)

- Completion of Studio with full layer manipulation and overlay functionality
- Integration of Studio with Grid and Report tools
- CTIH prototype development with dual-scale architecture implementation
- Database adaptation for higher resolution country-specific data
- User acceptance testing of AI interfaces and Studio

Phase 4: ACTO Integration and Final Testing (Months 13-16)

- Development of technical integration with ACTO ARO
- CTIH pilot implementation with selected country partners
- Comprehensive integration testing of all platform components
- Performance optimization and security hardening

Phase 5: Finalization and Knowledge Transfer (Months 17-18)

- ACTO ARO integration validation and final testing
- Final adjustments based on user feedback and testing results
- Comprehensive technical documentation completion
- Training sessions for CSC/ACU technical team on platform maintenance and operations
- Development of operational procedures and maintenance protocols
- Final system handover with complete code repository and documentation

6. Expected Outcomes and Deliverables

Deliverable 1: Inception Report and Work Plan

Comprehensive work plan detailing project approach, methodology, timeline with key milestones, resource allocation, team composition, risk identification and mitigation strategies, coordination mechanisms with CSC/ACU and relevant stakeholders, and quality assurance protocols. Initial assessment of platform current state and preliminary technical approach for each component.

Deliverable 2: AI Conversational Interfaces - First Functional Version

First functional version of AI-powered conversational interfaces implemented and operational across Report and Grid tools. Natural language processing capabilities enabling users to discover and query territorial indicators through conversational queries. Initial user testing results and feedback integration plan. Technical documentation of AI architecture and integration approach. Preliminary assessment of CTIH requirements based on initial stakeholder consultations conducted during Phase 1.

Deliverable 3: AI Conversational Interfaces and Platform User Experience Enhancements

Fully implemented AI-powered conversational interfaces enabling natural language indicator discovery across Report, Grid, and Studio tools. Enhanced user interface designs based on COP30 launch feedback optimized for both technical and non-technical users. Integration testing reports demonstrating AI functionality. User documentation for AI features.

Deliverable 4: Studio Advanced Spatial Analysis Environment and CTIH Prototype

Fully operational Studio with complete GIS-like capabilities including layer manipulation, overlay functionality, and spatial pattern analysis tools. Complete integration with Grid and Report tools. Functional Country CTIH prototype with dual-scale architecture implemented based on participatory design approach conducted during development phases. Database infrastructure adapted for higher resolution country-specific data. Seamless user experience enabling transition between regional and country-level analysis. Initial pilot implementation in at least one country. Comprehensive technical documentation. User manuals and training materials. Testing reports validating functionality. Documentation of participatory design process and stakeholder inputs incorporated into CTIH architecture.

Deliverable 5: ACTO Integration, Final Platform, and Complete Documentation

Implemented technical integration protocols with ACTO Amazon Regional Observatory. CTIH pilot implementation completed with at least one country partner. Integration testing reports and validation documentation. Training completion reports for CSC/ACU technical team. System handover documentation. Final project report documenting implementation summary, technical achievements, challenges and solutions, testing results, lessons learned, and recommendations for future platform evolution.

7. Project Schedule and Milestones

Deliverable 1: 30 days after signing the contract (Month 1)

Deliverable 2: 3 months after signing the contract

Deliverable 3: 7 months after signing the contract

Deliverable 4: 12 months after signing the contract

Deliverable 5: 18 months after signing the contract

8. Reporting Requirements

All reports and deliverables must be sent to the Bank in electronic file format, in Word, Excel, PowerPoint, or other formats subsequently agreed between the parties. Source code must be delivered in appropriate version control repository (GitHub or similar) with comprehensive documentation.

The firm will provide bi-weekly progress reports to CSC/ACU documenting development activities, milestones achieved, challenges encountered, and upcoming priorities. Monthly coordination meetings will be held with the Amazon Unit to review progress and strategic direction.

9. Acceptance Criteria

Each deliverable will be sent to the IDB Project Team Leader (CSC/ACU). Acceptance must be received before a milestone is considered completed. Acceptance will be made formally, by email, and will not exceed fifteen (15) days after receipt.

Technical deliverables will be evaluated based on functionality compliance with specifications, code quality and documentation standards, successful integration testing, user acceptance testing results, and adherence to IDB technical standards and security requirements.

10. Qualifications and Experience Requirements

For the development of this consultancy, a consulting firm with a minimum of 10 years of experience in development of complex geospatial platforms and territorial intelligence systems is required.

The firm must demonstrate that it has:

- Proven experience in developing web-based GIS platforms with advanced spatial analysis capabilities
- Demonstrated expertise in implementing AI-powered conversational interfaces and natural language processing for data query and discovery
- Experience in participatory design methodologies and stakeholder engagement processes
- Experience in developing dual-scale data architectures supporting both regional and country-level analysis

- Track record of successful platform integration projects involving bidirectional data exchange between complex systems
- Experience working with multilateral development banks or international organizations on territorial intelligence or environmental monitoring systems
- Capacity to handle large volumes of geospatial data with performance optimization
- Expertise in cloud infrastructure deployment, security hardening, and scalable architecture design
- Multidisciplinary team including: senior systems architects, full-stack developers with geospatial expertise, AI/ML specialists, database architects, DevOps engineers, and UX/UI designers
- Fluency in English and Spanish; Portuguese language capabilities are highly desirable
- References from at least three similar projects of comparable scope and complexity

11. **Supervision and Reporting**

Technical supervision will be provided by the Amazon Unit (CSC/ACU) in coordination with the Digital Transformation Division (TTD/TTR). It is the firm's responsibility to ensure that meetings are conducted, and reports are submitted to the IDB according to the agreed schedule.

The firm will coordinate closely with: CSC/ACU as primary technical supervisor, TTD/TTR for digital infrastructure integration, IDB Country Offices for CTIH pilot implementation, ACTO technical teams for ARO integration, and national institutions participating in CTIH participatory design and development.

12. **Schedule of Payments**

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.

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

Total Contract Amount: USD \$365,000

Contract Duration: 18 months

Payment Schedule	%
<i>Deliverable 1:</i> Inception Report and Work Plan (Month 1)	10%
<i>Deliverable 2:</i> AI Conversational Interfaces - First Functional Version (Month 3)	15%
<i>Deliverable 3:</i> AI Interfaces and Platform UX Enhancements (Month 7)	25%
<i>Deliverable 4:</i> Studio and CTIH Prototype (Month 12)	25%

<i>Deliverable 5: ACTO Integration, Final Platform and Complete Documentation (Month 18)</i>	25%
TOTAL	100%

RG-T4860

TERMS OF REFERENCE

Consulting Firm for Legal Frameworks, Institutional Agreements, Governance, and Sustainability

Regional

RG-T4860

TECHNICAL COOPERATION NAME: AmazoniaForever360+ Phase 2: Regional Scaling and Country Level Territorial Intelligence

1. Background and Justification

In November 2025, AmazoniaForever360+ was officially launched at COP30 in Belém, marking the transition from platform development to public deployment. The platform evolved from Amazon GRID (RG-T4174), a foundational technical cooperation implemented from 2023-2025 that established core territorial data infrastructure and first user experience.

AmazoniaForever360+ democratizes access to complex territorial intelligence across Amazonia through three integrated tools: Report (intuitive territorial report generation), Grid (hexagonal spatial analysis system), and Studio (advanced spatial analysis environment). The platform integrates over 140+ territorial indicators across eight thematic categories, providing AI-powered automated report generation and spatial analysis tools.

This Phase 2 addresses the critical institutional frameworks essential for long-term platform viability as an IDB-led regional public good. During Phase 1 (Amazon GRID - RG-T4174), a comprehensive Governance and Sustainability Plan was developed, providing detailed recommendations for organizational structure, governance model, hosting strategy, financial sustainability framework, and strategic alliance architecture. This consultancy will update and refine this Plan based on current institutional context, implement the governance and sustainability frameworks, and provide support for establishing the IDB-ACTO collaboration agreement.

Strategic integration with ACTO's Amazon Regional Observatory (ARO) requires formal legal frameworks and governance agreements establishing institutional collaboration between IDB and ACTO. Additionally, the platform's long-term sustainability depends on implementing comprehensive governance structures, diversified financial sustainability mechanisms, and formalized strategic alliances with regional entities, technology providers, and authoritative data sources.

This consultancy addresses the institutional, legal, governance, and sustainability frameworks that will enable AmazoniaForever360+ to operate as a sustainable regional public good serving Amazonian countries and stakeholders beyond the current technical cooperation period.

2. Objectives

The Consultancy will update, refine, and implement the institutional frameworks essential for long-term platform sustainability based on recommendations developed during Phase 1.

This includes: refining platform governance structures with clear operational protocols and decision-making frameworks; implementing financial sustainability mechanisms ensuring diversified funding strategies and institutional commitments; formalizing strategic alliances with regional entities, technology providers, and data partners; and supporting the development of legal frameworks and governance agreements establishing formal IDB-ACTO collaboration.

3. Scope of Services

This consultancy will contribute to the following components of the AmazoniaForever360+ Phase 2 project:

COMPONENT 3: ACTO Amazon Regional Observatory Integration

- Development of legal frameworks and governance agreements establishing formal IDB-ACTO collaboration
- Design of data sharing protocols, intellectual property arrangements, and institutional coordination mechanisms

COMPONENT 4: Governance and Sustainability Plan Implementation

- Implementation of platform governance structure based on recommendations developed during Phase 1, including establishment of governance entities with clear operational protocols
- Definition of management team roles, responsibilities, and decision-making frameworks following Phase 1 governance recommendations
- Design and implementation of financial sustainability framework based on Phase 1 analysis, with diversified funding strategies and institutional commitment mechanisms
- Formalization of strategic alliances based on alliance architecture developed in Phase 1, including implementation of three alliance categories (Strategic, Technological, and Data Alliances), memoranda of understanding, and collaborative framework agreements

The firm will work in close coordination with CSC/ACU (Amazon Unit) and relevant IDB institutional units to implement the governance and sustainability recommendations from Phase 1. The firm will also support development of the IDB-ACTO collaboration framework in coordination with ACTO representatives and IDB legal units.

4. Methodology

The consulting firm will employ a phased implementation approach based on governance and sustainability recommendations developed during Phase 1. The approach includes reviewing and refining Phase 1 recommendations, implementing governance structures and financial sustainability mechanisms, formalizing strategic alliance frameworks, and supporting IDB-ACTO collaboration framework development. The methodology includes:

- Phased implementation approach with clearly defined milestones tied to institutional framework completion

- Review and validation of Phase 1 Governance and Sustainability Plan recommendations as foundation for implementation
- Comprehensive review of IDB and ACTO institutional frameworks for collaboration agreement development
- Stakeholder consultation process with IDB units, ACTO representatives, and identified strategic partners
- Finalization of governance structures and operational protocols based on Phase 1 recommendations, ensuring clarity and institutional sustainability
- Implementation of financial sustainability models based on Phase 1 framework and best practices from comparable regional platforms
- Regular coordination meetings with CSC/ACU and relevant institutional units to ensure alignment with IDB policies and procedures
- Iterative review and validation of all legal documents, governance frameworks, and institutional agreements with IDB legal counsel

5. **Key Activities**

Activity 1: Review and Refinement of Governance and Sustainability Plan (Months 1-2)

- Review and validation of Phase 1 Governance and Sustainability Plan recommendations
- Refinement of governance structure, financial sustainability framework, and strategic alliance architecture
- Stakeholder consultations with IDB units and strategic partners

Activity 2: Implementation of Governance and Sustainability Plan (Months 3-4)

- Preparation of governance structure documentation with operational protocols
- Finalization of financial sustainability framework
- Preparation of alliance agreements for strategic partners
- Development of implementation guidelines

Activity 3: Support for IDB-ACTO Collaboration (Months 3-6)

- Development of IDB-ACTO collaboration framework
- Coordination with ACTO representatives and IDB legal counsel
- Support for agreement validation and signature processes

Final Activities: Documentation and Handover (Months 5-6)

- Finalization of all frameworks and agreements
- Comprehensive documentation package preparation

6. **Expected Outcomes and Deliverables**

Deliverable 1: Inception Report and Phase 1 Plan Refinement

Inception report with project approach, methodology, and work plan. Refined governance and sustainability framework based on Phase 1 recommendations including updated governance structure, financial sustainability model, and strategic alliance architecture.

Deliverable 2: Governance Structure and Financial Sustainability Framework

Complete governance structure documentation based on refined Phase 1 recommendations. Financial sustainability framework with funding strategies and institutional mechanisms. Strategic alliance architecture for three alliance categories with partners identified and formalization protocols.

Deliverable 3: IDB-ACTO Collaboration Framework and Alliance Agreements

IDB-ACTO collaboration framework including agreement, data sharing protocols, and coordination mechanisms. Alliance agreements for strategic partners. All legal documents validated by IDB legal counsel.

Deliverable 4: Implementation Guidelines and Final Documentation Package

Implementation guidelines for governance structure operation. Complete documentation package with all institutional frameworks, legal agreements, and strategic alliance agreements. Final project report with recommendations for ongoing institutional management.

7. Project Schedule and Milestones

Deliverable 1: 60 days after signing the contract (Month 2)

Deliverable 2: 3 months after signing the contract

Deliverable 3: 4 months after signing the contract

Deliverable 4: 6 months after signing the contract

8. Reporting Requirements

All reports and deliverables must be sent to the Bank in electronic file format, in Word, Excel, PowerPoint, or other formats subsequently agreed between the parties. All legal documents must be delivered in editable formats with tracked changes enabled for review cycles.

The firm will provide monthly progress reports to CSC/ACU documenting framework development activities, stakeholder consultations, legal review processes, and coordination with institutional partners. Regular coordination meetings will be held with the Amazon Unit and relevant IDB legal and institutional units to ensure compliance and alignment.

9. Acceptance Criteria

Each deliverable will be sent to the IDB Project Team Leader (CSC/ACU). Acceptance must be received before a milestone is considered completed. Acceptance will be made formally, by email, and will not exceed fifteen (15) days after receipt.

Legal documents and institutional frameworks will be evaluated based on: compliance with IDB and ACTO institutional requirements, legal soundness and enforceability, clarity of governance structures and operational protocols, feasibility of financial sustainability mechanisms, appropriateness of alliance frameworks, and validation by IDB legal counsel and relevant institutional authorities.

10. Qualifications and Experience Requirements

For the development of this consultancy, a specialized consulting firm with a minimum of 8 years of experience in institutional frameworks, governance structures, and legal agreements for multilateral organizations or regional platforms is required.

The firm must demonstrate that it has:

- Proven experience in developing legal frameworks and governance agreements for multilateral development banks or international organizations
- Demonstrated expertise in designing governance structures and operational protocols for regional platforms or public goods

- Experience in developing financial sustainability frameworks and resource mobilization strategies for knowledge platforms or territorial intelligence systems
- Track record of successful institutional agreement development between international organizations
- Experience with data sharing protocols, intellectual property arrangements, and collaborative framework agreements
- Understanding of multilateral development bank policies, procedures, and legal requirements
- Experience working in Latin American regional context with understanding of regional institutional frameworks
- Capacity to navigate complex institutional environments and coordinate multiple stakeholders
- Multidisciplinary team including: institutional law specialists, governance experts, financial sustainability advisors, and international agreement specialists
- Fluency in English and Spanish; Portuguese language capabilities are highly desirable
- References from at least three similar projects involving institutional frameworks or governance structures for multilateral organizations

11. **Supervision and Reporting**

Institutional supervision will be provided by the Amazon Unit (CSC/ACU) in coordination with relevant IDB legal and institutional units. All legal documents and institutional frameworks must be developed in compliance with IDB policies and procedures, and validated by IDB legal counsel before finalization.

The firm will coordinate closely with: CSC/ACU as primary supervisor, IDB legal units for legal framework validation, relevant institutional units for governance structure alignment, ACTO representatives for collaboration agreement development, and identified strategic partners for alliance framework formalization.

It is the firm's responsibility to ensure that meetings are conducted and reports are submitted to the IDB according to the agreed schedule.

12. **Schedule of Payments**

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.

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

Total Contract Amount: USD \$75,000

Contract Duration: 6 months

Payment Schedule	%
<i>Deliverable 1:</i> Inception Report and Phase 1 Plan Refinement (Month 2)	20%

<i>Deliverable 2: Governance and Financial Sustainability Framework (Month 3)</i>	30%
<i>Deliverable 3: IDB-ACTO Collaboration Framework and Alliance Agreements (Month 4)</i>	30%
<i>Deliverable 4: Implementation Guidelines and Final Documentation (Month 6)</i>	20%
TOTAL	100%