

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

PROJECT NAME: Mainstreaming Climate Action in Private Sector Development Projects

SELECTION PROCESS #: RG-T4668

SELECTION METHOD: Full Competitive

COUNTRY: Regional

SECTOR OR DEPARTMENT: PTI/CTI

TC NAME: Mainstreaming Climate Action in Private Sector Development Projects

FUNDING – TC #: ATN/CO-21518-RG

LINK TO TC DOCUMENT: <https://www.iadb.org/es/proyecto/RG-T4668>

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). 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: [April 10, 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. 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: [Claudia Stevenson](mailto:Claudia.Stevenson@iadb.org), claudiast@iadb.org

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.



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 delivery of technical assistance for the elaboration of 7 market-driven, private sector-led Cluster Development Plans (CDPs) that advance the development of inclusive, sustainable, and climate-smart clusters and value chains across the Caribbean region.

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

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

3.3 Estimated budget: **US\$189,000**

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

Consultancy for the Elaboration of Cluster Development Plans that Promote Competitiveness and Climate Action in the Caribbean Private Sector

REGIONAL

RG-T4668

ATN/CO-21518-RG

<https://www.iadb.org/es/proyecto/RG-T4668>

Mainstreaming Climate Action in Private Sector Development Projects

1. Background and Justification

- 1.1. [Compete Caribbean +](#) (CC+) is a private sector development program jointly funded by the Inter-American Development Bank (IDB), the United Kingdom Foreign Commonwealth & Development Office (FCDO), the Caribbean Development Bank (CDB), and the Government of Canada. It aims to improve gender-responsive sustainable growth and climate resilience of Caribbean countries' private sector. As the third phase of Compete Caribbean, it builds on the success of the Compete Caribbean Program (2010-2017) and of the Compete Caribbean Partnership Facility (2017-2023).
- 1.2. Under the CC+ Program, a key instrument of support to the region's private sector is the strengthening of clusters and value chains. This provides the Caribbean's small and medium enterprises (SMEs) with an opportunity to collectively service customers, attract new clients or solve production problems in ways that are not possible for businesses operating independently. For example, the firms actively involved in CC+-supported cluster initiatives benefit from access to new and larger markets, business development/branding, production of new or improved products or services, cost sharing/saving, workforce development, higher and more uniform quality standards, supply chain or process improvements, better government support, and research and development to drive innovation and global competitiveness over time. Furthermore, by integrating climate action into these efforts, clusters can amplify the private sector's role in fostering environmental sustainability, allowing for the adoption of innovations that reduce carbon emissions, improve energy efficiency, and enhance resilience to climate impacts while spreading costs and across multiple firms. These efforts are particularly important in a region such as the Caribbean, which lags in adopting climate-smart and low-carbon practices, a concerning trend given the region's vulnerability to climate change.
- 1.3. Given this context, CC+ launched a [Cluster and Value Chain Call](#) in December 2024 to identify new or existing clusters and value chains in the Caribbean to increase their competitiveness while embedding green innovation, climate resilience, and environmental sustainability into their goods, services, and operations. Targeted clusters and value chains should aim to enhance competitiveness, boost sales, create jobs, and/or boost exports, whilst also demonstrating strong potential to strengthen supply chains, enhance climate adaptability, increase resource efficiency,

and/or develop innovative green business models, products or services. Proposals should ensure meaningful participation opportunities for underrepresented groups across gender and diverse backgrounds.

- 1.4. This cluster approach builds on the success and lessons learned in two previous phases of Compete Caribbean, leveraging its proven cluster methodologies to enable even the smallest firms to jointly achieve the economies of scale required to build competitive advantages in the global economy. The first two phases of Compete Caribbean supported 23 cluster/value chain projects, which together impacted over 1,500 businesses.

2. Objectives

- 2.1. The objective of this consultancy is to elaborate market-driven, private sector-led Cluster Development Plans (CDPs) that advance the development of inclusive, sustainable, and climate-smart clusters and value chains across the Caribbean region.

3. Scope of Services

- 3.1. The scope of this assignment is to develop 7 comprehensive Cluster Development Plans for clusters and value chains shortlisted from the CC+ [Cluster and Value Chain Call](#). These CDPs should outline strategies to enhance competitiveness while embedding green innovation, climate resilience, and environmental sustainability. CDPs should also define a common vision, objectives, priorities, as well as detailed activities, roles and responsibilities, budget, funding sources, timeline, and appropriate monitoring and evaluation system, ensuring stakeholder consensus and commitment to implementation. CDPs should also present meaningful participation opportunities for underrepresented groups across gender and diverse backgrounds.

4. Key Activities

- 4.1. For each of the CDPs to be developed, the consulting firm will:
 - Conduct a project kick-off meeting (virtual or in-person) to introduce the consulting team, discuss project objectives, approach, expected outputs and outcomes, workplan and timelines, and any other issues related to the execution of the consultancy.
 - Conduct desk research to become familiar with the sector, value chain, climate and sustainability challenges and opportunities, institutional infrastructure in the country, growth potential, cost drivers, and risks.
 - Identify opportunities to mainstream climate for competitiveness, including strategies/approaches/technologies/partnerships to strengthen supply chains, enhance climate adaptability, increase resource efficiency, and/or develop innovative green business models, products or services.

- Develop relationships with relevant cluster stakeholders (firms, BSOs, government agencies, academic institutions, etc.) to earn trust, understand concerns, identify common interests, and to encourage collaboration on achieving common objectives that will improve the cluster's competitiveness.
- Provide information and share knowledge on cluster best practices to encourage general learning and sustainability on cluster methodology, both for selected clusters and wider audiences as part of program knowledge and dissemination strategy.
- Provide coaching and advisory services to cluster stakeholders for them to converge around an initiative and/or a broader development agenda. This includes helping the cluster to articulate a common vision, goals, and define a value proposition for the market targeted and growth strategy/ies. The strategy/ies should clearly address gender equality and assess the potential for incorporation of women-owned firms (WOFs). As outlined above, the consultant should also assess climate change risks and incorporate initiatives to enhance climate change resiliency and adaptation.
- Facilitate on the ground stakeholder consultations with cluster stakeholders to reach final consensus around the strategies and activities to be presented in the CDP. The consulting firm will be responsible for liaising directly with each cluster to confirm in-country mission dates and arrange all related logistics.
- Elaborate the CDP in the template provided by CC+, on behalf of cluster stakeholders. This includes a description of the specific cluster project, being proposed for funding by CC+, along with the completed TORs for consultancies to be undertaken by the project and other annexes detailed in the CDP template.
- Help the cluster to design a monitoring and evaluation system (M&E) that is suited to their initiative, and that includes indicators to generate baseline and monitor jobs generated for women and participation of WOFs and other diverse and vulnerable groups, including those affected by climate change. M&E should encompass both quantitative and qualitative approaches to capture changes in knowledge, attitude, and practice of key stakeholders on the cluster methodology over time.
- Submit cluster-sanctioned products to CC+.

5. Expected Outcome and Deliverables

5.1. ***Inception Report & Work Plan (Deliverable 1):*** The consulting firm will deliver an Inception Report & Work Plan, which includes a general synopsis of the consultancy, as well as proposed activities, timelines (including dates for the proposed missions and milestones), responsibilities, expected outputs and outcomes (results) for each individual cluster. The workplan will be updated as necessary in discussion with the specific cluster and agreement with CC+/IDB. The team of consultants assigned to each cluster are expected to spend at least 10 full working days in each country/project to facilitate stakeholder consultations, training and capacity building, etc.

5.2. ***Mission Reports, Workshop Agenda, Participant List describing the expected and achieved***

results for the workshops with cluster stakeholders (Deliverable 2): At least 2 in-person workshops will be held with the stakeholders of each shortlisted cluster to define a common vision, goals, and value proposition for the market targeted and growth strategy/ies. At least one (1) of these workshops should share knowledge on cluster best practices and to encourage general learning and sustainability on the cluster methodology. The mission reports (before and after) are short and simple documents describing the objectives and participants in each mission which must be cleared by the IDB country office two weeks in advance. A Back-to-office report (BTOR) summarizing the activities and contact of participants to the meetings is also required for each mission (+/-1page).

5.3. **Virtual Cluster Awareness Raising and Capacity Building Workshops (Deliverable 3):** The consulting firm will deliver 1-2 interactive virtual workshops for both shortlisted and non-shortlisted clusters, including the broader private sector audience. These workshops will focus on cluster methodology and should be highly interactive, featuring breakout sessions by sector (e.g., agriculture, blue economy). The aim is to provide general capacity-building and awareness-raising to strengthen understanding among wider stakeholders on the benefits of the cluster approach and how to effectively apply it in their respective sectors and contexts. Workshops should be accompanied by a Workshop Plan to be submitted for approval by the Compete Caribbean Team, as well as a short summary report to be provided following the event.

5.4. **Cluster Development Plans (CDPs) (Deliverable 4):** The consulting firm will deliver 7 market-driven, private sector-led CDPs in accordance with the CC+ template, which must include the process and distribution channel mapping, value chain analysis, pricing model and cost sheet, competitive analysis, climate analysis, partnership agreement, results matrix, budget, procurement plan, Terms of References (ToR) for the technical assistance needed in the CDP, etc.

6. Project Schedule and Milestones

6.1. The project is expected to begin June 01, 2025 (or sooner if possible), and to be completed three (3) months thereafter. Two (2) missions of approximately five days each are expected per project (14 missions in total across the 7 projects). Travel and workshop costs are to be included in the consulting firm's budget. The schedule and milestones will be defined by the firm in agreement with the IDB and each individual cluster and captured by the first deliverable (Workplan and Inception Report).

7. Reporting Requirements

7.1. The Consulting firm is expected to provide bi-monthly (twice a month) status updates on the progress of implementation to the CC+/IDB. Additional virtual meetings may be held as necessary to discuss any specific issues.

- 7.2. All deliverables must be submitted to the Bank in an electronic file. Deliverables should include cover, main document, and all annexes. Zip files will not be accepted as final reports, due to Records Management Section regulations.

8. Acceptance Criteria

- 8.1. All deliverables will be reviewed by the IDB/CC+. Comments will be provided by written email. The consulting firm is expected to provide written feedback on how comments were addressed.
- 8.2. Approval of quality deliverables will be provided in writing by email from the Team Leader of the project.

9. Consulting Firm and Team Requirements

Qualifications of Team Members:

- This consultancy requires the services of a consulting firm with extensive experience in cluster and value chain initiatives and institutional capacity building. The firm must have the ability to provide local and sectoral expertise, either through separate contracting of local experts, local partnerships, or other mechanisms to obtain local access.
- The Lead Consultant should possess a Master's degree in Management, Business Administration, International Development, Public Policy or a related field.
- Junior Consultants should possess at least a Bachelor's Degree in Management, Business Administration, International Development, Public Policy or a related field.
- The firm must have team members with experience integrating climate resilience into economic strategies, aligning mitigation, adaptation, and sustainability goals with private sector growth and competitiveness.
- The firm must have a team member with experience in conducting gender and diversity gap assessments.

Skills and Experience in:

- Demonstrated experience in cluster development and value chain methodologies and best practice;
- Demonstrated experience integrating climate resilience into economic strategies, aligning mitigation, adaptation, and sustainability goals with private sector growth and competitiveness
- Experience in developing countries, and preferably in the Caribbean and Latin America; experience in CC+ beneficiary countries is an asset;
- Experience with processing large amounts of information and synthesizing it in an understandable fashion to decision-makers and wider user audiences.

Core Competencies:

- Highly developed communication skills, including the preparation of high- quality reports

and the delivery of training;

- Ability to work under pressure to meet tight deadlines without compromising the quality of outputs;
- Ability to maintain confidentiality and use discretion when dealing with sensitive intellectual property issues;
- Cultural awareness and sensitivity to country specific issues;
- Fluency in oral and written English.

10. Other Requirements

10.1. Non applicable.

11. Supervision and Reporting

11.1. The consultancy will be supervised by the Project Team Leader, Claudia Stevenson (PTI/CTI), and coordinated by the CC+ Pillar 1 Coordinator. The Consulting Firm is also expected to work closely with each of the shortlisted clusters to ensure adequate stakeholder engagement as well as buy-in and consensus on the final CDPs for approval.

12. Schedule of Payments

12.1. 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.

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

Payment Schedule	
<i>Deliverable</i>	%
1. <i>Acceptance of Inception Report & Work Plan (Deliverable 1)</i>	20%
2. <i>Acceptance of In-Person Workshop Agendas/Expected Results/Mission Reports (Deliverable 2) and Virtual Workshop Plan and Report Summary (Deliverable 3)</i>	40%
3. <i>Acceptance of 7 Final Cluster Development Plans with all revisions made as requested by CC+/IDB and cluster (Deliverable 4)</i>	40%
TOTAL	100%