

REQUEST FOR EXPRESSIONS OF INTEREST CONSULTING SERVICES

Selection # as assigned by e-Tool: *RG-T4003-P001*

Selection Method: *Full Competitive Selection*

Country: *Regional*

Sector: *Blue Economy and Essential Services*

Funding – TC #: *ATN/CO-19130-RG*

Project #: *RG-T4003*

TC name: *Technology Extension Services (TES) in the Caribbean Blue Economy and Essential Services Sectors*

Description of Services: *Technology Service Providers (TSPs) to perform Technical Audits and Specialized Technical Assistance*

Link to TC document: <https://www.iadb.org/en/project/rg-t4003>

The Inter-American Development Bank (IDB) is executing the above-mentioned operation. For this operation, the IDB intends to contract consulting services described in this Request for Expressions of Interest. Expressions of interest must be delivered using the IDB Portal for Bank Executed Operations (<http://beo-procurement.iadb.org/home>) by: June 30th 2022, 5:00 P.M. (Washington D.C. Time).

The consulting services (“the Services”) include Technology Service Providers (TSPs) to perform Technical Audits and Specialized Technical Assistance for SMEs in the Blue Economy and Essential Services Sectors in the Caribbean in the third quarter of 2022.

Eligible consulting firms will be selected in accordance with the procedures set out in the Inter-American Development Bank: [Policy for the Selection and Contracting of Consulting firms for Bank-executed Operational Work](#) - GN-2765-4. All eligible consulting firms, as defined in the Policy may express an interest. If the Consulting Firm is presented in a Consortium, it will designate one of them as a representative, and the latter will be responsible for the communications, the registration in the portal and for submitting the corresponding documents.

The IDB now invites eligible consulting firms to indicate their interest in providing the services described above in the [draft summary](#) of the intended Terms of Reference for the assignment. Interested consulting firms must provide information establishing that they are qualified to perform the Services (brochures, description of similar assignments, experience in similar conditions, availability of appropriate skills among staff, etc.). Eligible consulting firms may associate in a form of a Joint Venture or a sub-consultancy agreement to enhance their qualifications. Such association or Joint Venture shall appoint one of the firms as the representative.

Interested eligible consulting firms may obtain further information during office hours, 09:00 AM to 05:00 PM, (Washington D.C. Time) by sending an email to: Ramona Sinanan at Ramonas@iadb.org.

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Summary of Terms of Reference

TERMS OF REFERENCE

Technology Service Providers (TSPs) - Technical Audits and Specialized Technical Assistance

REGIONAL

RG-T4003

<https://www.iadb.org/en/project/rg-t4003>

Technology Extension Services (TES) in the Caribbean Blue Economy and Essential Services Sectors

1. Objectives

1.1. The objective of this consultancy is to provide small and medium-sized enterprises in the Caribbean blue economy and essential services sectors with effective and specialized services that can assist them to increase adoption of relevant technology, as well as technical assistance that can strengthen beneficiary firms' capacity to innovate. Through interaction with the advisory consultant that has already been contracted, it is expected that the consulting firm will strengthen its own methodological tools regarding Technology Extension Services so that the firm can continue extending these kinds of services to businesses in the region, if there continues to be demand for these services.

1.2. Specific objectives are: (i) conduct on-site technical audits of up to 100 selected firms and develop Technology Audit Plans (TAPs) that guide implementation of future technical assistance efforts to help the firm adopt new technology; and (ii) deliver effective specialized technical assistance to 50 selected firms – as outlined in the TAP. The consulting firm is not expected to have all the necessary expertise in-house but must provide evidence of having ready access to the highly specialized consultants needed for each line of services offered within its proposal.

2. Scope of Services

2.1 Expected outputs include: (i) up to 100 Technology Audit Plans (TAPs) and (ii) 50 Technology Assistance Reports (TARs) which document the results of the delivery of specialized technical assistance to firms. During the Audit and Assistance period, the Consulting Firm should coordinate regularly with local BSOs actions to keep them informed about the progress of each country's firms, as well as recommend or request support to achieve expected results timely. Following the provision of technical assistance, the consulting firm will prepare a TAR to describe the progress achieved in implementation, in relation to the TAP and to expectations, and include justified recommendations for next steps – i.e. the business case for additional investment needed by the firm. Overall, the CCPF TES in the BE and ES sectors project has been designed to finance 100 technology audits and 50 technology extension interventions. The consulting firm should provide an indication of its capacity in terms of the number of TAPs and TARs it can realistically deliver, and prepare the associated documentation, during a one-year period and

in what type of services given the availability of its experts. The price proposal shall include a travel expenses budget, as well as, given the COVID context, include in its proposal mechanisms by which it can deliver services to beneficiary firms in the 13 target countries remotely, or through partners on the ground. The traveling expenses (hotel, transport, per diem) for the TAPs and TARs will be paid by Compete Caribbean based on the policy of the Bank. In a normal situation, the expectation is that the beneficiary firms would be visited during the TAP process, and at least once during the implementation process¹. If due to COVID these trips cannot be made, the invoices associated to the payment of deliverables shall omit the travel costs.

3. Key Activities

- 3.1 Preparation phase for TES delivery:** Assign key staff and consultants to participate in and complete all prescribed workshops and trainings to be provided by the global consultant contracted to set-up the TES activities so the project can be delivered efficiently. The TES provider will coordinate this initial preparation phase with the global consultant, SBDCs, IDB/Compete Caribbean to ensure that the procedures for payment processing and performance management are properly established and agreed upon.
- 3.2 Regional meeting:** Participation in a regional meeting organized by the CCPF to facilitate knowledge exchange and ensure common understanding of procedures in the delivery of Technology Extension Services, including monitoring & evaluation and payment. The participants will include representatives of all participating SBDCs, the regional TES provider, CCPF and the global consultant. Target date: July 2022².
- 3.3 Technical Audit – Technology Audit Plan (TAP):** Once the eligibility of 100 SMEs in the blue economy and essential services sectors have been assessed by the SBDCs and/or other participating BSOs in the beneficiary countries and ratified by the CCPF, the consulting firm will work with the advisory consultant to assess each of the firms and perform 100 Technology Audit Plans (one for each firm³ - using a pre-established format) describing what should be done, by what type of experts, estimated timeline, budget and any other requirements to address the problem/opportunity identified in the TAP.
- 3.4 Specialized Technical Assistance – Technical Assistance Report (TAR):** The regional TES provider will be required to coordinate and manage the effective delivery of the technical interventions as outlined in the TAP in up to 50 firms, with some support and observation from the local SBDC or BSO and the advisory consultant. The advisory consultant will advise on how to select the group of 50 beneficiary firms from the initial 100 firms who received the TAPs. After each intervention, the TES provider will submit a Technical Assistance Report (TAR) (one for each firm, using a pre-established format) that will document the intervention provided and the results observed. The TAR will also include recommendations and justifications (business case) for additional priority actions and investments by the benefiting client.
- 3.5 Administration:** The TES provider is expected to monitor outputs, submit reports and invoices as agreed upon, and ensure that the delivery of TES is completed effectively. The effort will include the participation of the SBDCs and/or BSO to foster knowledge sharing and optimize sustainability.

4. Expected Outcome and Deliverables

- 4.1** This contract is expected to produce the following outcomes: 100 firms receiving a technology audit, and 50 firms receiving technical assistance to adopt cutting edge technology in their sector, as well as increased knowledge

¹ By the time the consultancy starts, the number of eligible firms will be known, therefore the trips can be arranged to pool firms by territory and be able to visit more than one firm on each trip. The Compete team shall provide preliminary estimates of how many firms are eligible in which countries, and in which sectors, to make it easier to prepare the price proposal. However, there will be a final push in the call for proposals to get more eligible firms in certain under-represented countries, so the figures have to be taken as an estimate.

² If lockdowns and border closings remain in place by this date, this meeting may be done virtually.

³ A larger number of eligible firms will be selected to account for attrition, as well as firms where the BPA does not match the reality. The global advisory firm will work with the consulting firm to reach out to the larger set, conduct due diligence – the SBDCs are expected to participate in this process - and define/apply criteria for selection of the remaining 100.

about private sector demand, absorption capacity and bottlenecks in supply of Technology Extension Services in the Caribbean Blue Economy and Essential Services sectors.

4.2 The deliverables are:

- 4.2.1 **Workplan** developed in collaboration with the advisory consultant and other stakeholders of planned delivery of 100 TAPs and 50 TARs. The workplan should include the time required to follow-up with the initial 100 eligible firms in collaboration with the international advisory consultant, in order to select the 100 firms that will receive the technology audits. The workplan should also include the training session with the international advisory consultant.
- 4.2.2 **Up to 100 Technology Audit Plans (TAPs).** The technical audits to the 100 selected firms will be conducted by a specialist assigned by the TES provider during a one-day site visit, which, if possible, will include the SBDC and/or BSO representative. The audits will follow the protocols/methodologies agreed to with the international advisory consultant, who will also accompany some of the visits. The resulting Technology Audit Plan (TAP) will describe the most critical areas of technological improvement for the beneficiary firm and include: what needs to be done, why, expertise required, targets, timeline, budget, outcomes expected (in terms of impact on the firm of adopting the technology), as well as the input requirements expected from the firm in order to implement the intervention successfully. In some cases, an investment in capital goods may be required prior to the intervention. If so, the TAP will need to specify these. However, in most cases, the beneficiary inputs to the technology adoption process will be defined in terms of working hours expected by specific staff members. For example, if process reengineering is recommended, the involvement of key operations staff and the executive director will be essential to the new design. At least thirty percent 30% of TAPs will be targeted at SMEs owned by women.
- 4.2.3 **50 Technology Audit Reports (TARs).** Beneficiary firms interested in implementing the recommendations in the TAP will submit a Letter of Commitment agreeing to contribute the inputs delineated by the TAP (i.e. allocation of specific staff members to the intervention recommended, investment in capital goods, etc). Once the TES provider and/or SBDC obtains the letter of commitment, the consulting firm will plan the intervention with the relevant experts. The SBDC will remain in touch with the client to monitor progress. Once the intervention is completed, the TES provider will prepare a Technical Assistance Report (TAR) describing what has been delivered and achieved in relation to expectations. The TAR will also provide specific recommendation and justification with an estimated business case for additional efforts or investments needed. The SBDC will record the type of service delivered, hours worked, and confirm with the beneficiary firm the quality of services to trigger the final payment by Compete Caribbean to the TES provider. The target is 50 technical interventions across participating countries, 30% of which shall be targeted at SMEs owned by women.
- 4.2.4 **A Project Closing Report (PCR):** the firm should capture in a short document (no more than 15 pages) lessons learned from the set of TAPs and TARs executed, reflecting on: a) capacity of beneficiary firms to absorb the technology; b) any bottlenecks in delivery; c) ways to improve/sustain a regional delivery mechanism of this kind, including the potential role of SBDCs and other BSOs. The PCR should include 5 stories in each sector from the field.