

**PROCUREMENT NOTICE #023/2015  
IPEA RESEARCH PROGRAM  
INDIVIDUAL CONSULTANT - FOREIGN EXPERT EXCHANGE**

**Agreement on Technical Cooperation Loan No. 1841 / OC-BR - BR-L1060**

**Project:** Knowledge Management and Repository: Implementation of the Intelligence Group

**Hiring Method:** Selection of Individual Consultants - GN 2350-7 of the Inter-American Development Bank - IDB.

**Description of assignment:** Hiring an individual consultant to gather and analyze information about Federal Public Administration research lacks and necessities, and to transfer the knowledge necessary for executing this same work to Ipea employees.

1. The Institute for Applied Economic Research (IPEA) has partnered with the Inter-American Development Bank (IDB) to foster the formulation, monitoring and evaluation of public policies in Brazil. The objective of the agreement is to enhance IPEA's ability to produce, organize and disseminate knowledge about the development challenges facing the country with a final aim at providing alternative solutions.
2. To this end, IPEA proposes to use part of the IDB resources for consultant selection to support the project 'Knowledge Management and Repository: Implementation of the Intelligence Group', which aims to implement activities, managerial and research projects on the fields of Knowledge Management and Quality Management at Ipea. One of the activities related to Knowledge Management is the knowledge production, specifically those directed to strategic planning and decision making process.
3. The work of the consultant aim to gather and analyze information about Federal Public Administration research lacks and necessities, and transfer the knowledge necessary for executing this same work to Ipea employees. Researches that could be done by Ipea and could be inputs to improve the decision making process and the planning of short, medium and long term at these public institutions. At least 70% of the ministries must be contemplated for the interviews and documental analysis, used to comprehend how the decision making processes occur in these institutions.
  - 3.1. The mapping of the relevant decision making processes shall be qualitative, including interviewing, and the field activities will be follow by an Ipea employee, with the aim of transferring the methodological knowledge necessary for reproducing this work periodically.
  - 3.2. Finally, the consultant shall give two lectures and conduct a workshop to transfer the knowledge about the process of Intelligence generation, approaching the main methods and technics used.
  - 3.3. In this context, it's expected to provide Ipea with the most advanced methods in this field, creating expertise that contributes to Intelligence generation for support decision making and strategic planning processes.
4. The consultant shall:
  - 4.1. Produce an Intelligence Report containing the results of the qualitative survey, that will contribute to a greater dissemination of the contents and will later be used as direction for capacitation.
  - 4.2. Give two lectures and conduct a workshop with Ipea employees, for discussion and knowledge transferring.
5. It shall be subject to the following methodological and contractual aspects::
  - 5.1. The consultant work will be developed in conjunction with the project team;
  - 5.2. The activities should be developed in a period of six (6) months from the contract signature;

<i>Activities</i>	<i>Months</i>					
	1°	2°	3°	4°	5°	6°

1. Report n. 1						
2. Evaluation and corrections						
3. Final Report						
4. Lectures						
5. Workshop						

- 5.3. The activities can be performed in the consultant's office, except for the interviews with the Federal Public Administration, the lectures and the workshop to be held at the IPEA in Brasilia, on dates to be agreed with the Ipea's technical team, respecting the timing of products execution.
- 5.4. IPEA will provide the room with the basic features for the lecture and workshop, at its headquarters in Brasilia;
- 5.5. Any travel expenses, lodging and board for the provision of advisory services, if applicable, will be the responsibility and burden of the contracted consultant;
- 5.6. All studies, reports, graphs, computer programs and other products prepared by the consultant will be of perpetual ownership of IPEA. The consultant may retain copies of such documents and computer programs;
- 5.7. All products can be delivered in digital form via e-mail, with return receipt requested;
- 5.8. The lecture to be held must be accompanied by the delivery of the digital format presentation;
- 5.9. The products will be accepted after the considerations of the project coordinators and possible adjustments requested;
- 5.10. The texts will be written in English or Portuguese, as well as the lecture and workshop to be held at Ipea;
- 5.11. Payments will be made by products delivered and approval by the project coordinator.

6. The products are:

- 6.1. Product 1: Intelligence Report – preliminary version, contemplating the research needs of the Federal Public Administration and its justifications, taking into account the knowledge about the decision making process of the institutions, segmented by sectorial areas, following the model and specifications of Appendix 3;
- 6.2. Product 2: Intelligence Report – final version;
- 6.3. Product 3: Lecture to IPEA board of directors, presenting the results, lasting between 30 and 40 minutes, followed by a debate. The content of the presentation, available in digital version, must contain the essential of product 2;
- 6.4. Product 4: Lecture on an event open to all IPEA's employees, present the results, lasting between 40 and 60 minutes, followed by a debate. The content of the presentation, available in digital version, must contain the essential of product 2;
- 6.5. Product 5: Workshop to IPEA's employees, lasting 16 hours, counting with at maximum 20 participants. In this workshop, the consultant shall present the results of his work and shall also conduct training for knowledge transferring about the process of Intelligence making, approaching the main methods and techniques. The consultant will also participate of a round table and shall be available to discuss and answer questions about the themes of the lecture and the Intelligence Report – final version (Product 2), enabling better comprehension of the products.

7. The consultant hired must meet the following requirements:

- 7.1. Mandatory requirements:
  - 7.1.1. Master degree, for at least 5 years;
  - 7.1.2. Fluent in Portuguese or English;

7.1.3. Previous experience with interviewing methods and Intelligence generation;

7.1.4. Availability to be in Brasília during the survey with the institutions of the Federal Public Administration and during 2 consecutive weeks for the presentations and workshop, during the last month of the contract.

7.2. Desirable requirements:

7.2.1. Previous experience with the Intelligence field;

7.2.2. Previous experience with Intelligence training;

7.2.3. Published works related to the theme: books, chapters and academic journals with peer review system, classified in international systems;

7.2.4. Participation in conferences, seminars and colloquia about Intelligence.

8. The selection process will consist of analyzing the candidate's resumes and technical proposal.

8.1. The candidates that meet the mandatory requirements will be evaluated according to the following criteria.

8.2. The Resume Evaluation is eliminatory and classificatory.

8.2.1. The candidates will be ranked by experience criteria, according to the table below;

8.2.2. The final score is obtained by the weighted average score on each of the criteria.

8.2.3. Only candidates who reach final score equal or higher than 6 will be classified.

CRITERIA	SCORING	WEIGHT
1. Experience with Intelligence generation	<ul style="list-style-type: none"> <li>• No experience: 0</li> <li>• 1 to 5 years of experience: 2,5</li> <li>• 5 to 10 years of experience: 5</li> <li>• 10 to 15 years of experience: 7,5</li> <li>• Over 15 years of experience: 10</li> </ul>	7
2. Experience with training course taught in Intelligence field	<ul style="list-style-type: none"> <li>• No experience: 0</li> <li>• 1 to 5 courses taught: 2,5</li> <li>• 5 to 10 courses taught: 5</li> <li>• 10 to 15 courses taught: 7,5</li> <li>• Over 15 courses taught: 10</li> </ul>	6
3. Training courses taken in Intelligence field	<ul style="list-style-type: none"> <li>• No courses: 0</li> <li>• 1 to 5 courses taken: 2,5</li> <li>• 5 to 10 courses taken: 5</li> <li>• 10 to 15 courses taken: 7,5</li> <li>• Over 15 courses taken: 10</li> </ul>	5
4. Published works about the theme in academic journals with peer review system, classified in international systems	<ul style="list-style-type: none"> <li>• No works published: 0</li> <li>• 1 to 10 works published: 2,5</li> <li>• 11 to 20 works published: 5</li> <li>• 21 to 30 works published: 7,5</li> <li>• Over 31 works published: 10</li> </ul>	4
5. Published books about the theme	<ul style="list-style-type: none"> <li>• No books: 0</li> <li>• 1 to 3 books: 2,5</li> <li>• 4 to 6 books: 5</li> <li>• 7 to 10 books: 7,5</li> <li>• Over 10 books: 10</li> </ul>	3
6. Published book chapters	<ul style="list-style-type: none"> <li>• No chapters: 0</li> <li>• 1 to 3 chapters: 2,5</li> <li>• 4 to 6 chapters: 5</li> <li>• 7 to 10 chapters: 7,5</li> <li>• Over 10 chapters: 10</li> </ul>	3

CRITERIA	SCORING	WEIGHT
7. Performance in public or private institutions that have activities of Intelligence, preferably in the present moment.	<ul style="list-style-type: none"> <li>• No performance: 0</li> <li>• Performance in the present moment: 2</li> <li>• 1 to 5 years of cumulated performance: 2</li> <li>• 6 to 10 years of cumulated performance: 4</li> <li>• 11 to 15 years of cumulated performance: 6 pontos</li> <li>• Over 15 years of cumulated performance: 8</li> </ul>	2
8. Participation in conferences, seminars and colloquia about Intelligence	<ul style="list-style-type: none"> <li>• No participation: 0</li> <li>• 1 to 5 participations: 2,5</li> <li>• 6 to 10 participations: 5</li> <li>• 11 to 15 participations: 7,5</li> <li>• Over 15 participations: 10</li> </ul>	1

8.3. The Evaluation of the Technical Proposal is eliminatory.

8.3.1. Only the candidates classified in the Resume Evaluation will be considered;

8.3.2. The submission of the technical proposal is mandatory in the act of the expression of interest;

8.3.3. If the technical proposal is not submitted, the candidate will be eliminated;

8.3.4. The proposal must have at least 5 (five) and at most 10 (ten) pages. It must have: Title, Introduction (contextualization, objectives, and justification), indication of the preliminary sources of research and the main references, methodological indications, specifying the outputs delivers according to schedule of item 5.2, and Bibliographic References. It shall not have annexes or appendixes.

8.3.5. The proposal will be evaluated about the clarity, objectivity and adherence to project objectives;

8.3.6. If the technical proposal is considered insufficient, the candidate will be eliminated.

8.4. The candidates will be ranked in decreasing order of scoring.

8.5. The candidate with higher scoring will be selected.

8.6. In case of a tied score, preference will be given to the candidate with higher number of publications about the theme, considering the publications of the criteria 4, 5 and 6. If the tied score persists, preference will be given to the candidate with greater experience in Intelligence generation.

9. Interested consultants must express interest as follows:

9.1. Forward documentation listed in item 9.3 by e-mail to the address [cadastrodeconsultores@ipea.gov.br](mailto:cadastrodeconsultores@ipea.gov.br), up to 18 hours (Brasilia time – GMT 3) of November 27<sup>th</sup>, 2015, indicating in ‘Subject’ the number of the Procurement Notice (023/ 2015) and the project name (Knowledge Management and Repository: Implementation of the Intelligence Group).

9.2. However, there will be tolerance of six hours counted from the closing time. It is recommended sending the messages in advance, since the IPEA is not responsible for manifestations not received due to any technical problems and congestion.

9.3. At the moment of interest expression, the consultants should submit the following documentation:

9.3.1. Copy of th personal documents (RG e CPF), if brazilian, or copy of the passport, if stranger.

9.3.2. Curriculum vitae;

9.3.3. Titles and academic certificates;

9.3.4. Copies of publications in journals or links to access;

9.3.5. Certificates issued by a legal entity of public or private law or other documents with evidential value to demonstrate experience;

9.3.6. Technical proposal.

9.4. Expressions of interest which do not meet the prescribed manner will not be considered.

10. Candidates who express interest will be evaluated by a Judge Committee, consisting of three public officials, designated by the IPEA Research Program Coordinator.
11. The Judging Committee will evaluate the documentation submitted by the candidates, assigning the scores and choose the best candidate ranked.
12. IPEA will disclose the result of the selection process on its website and publish statement in the Official Gazette containing the classification of the three candidates best classified.
13. Applicants may request information about the reasons for their elimination from the selection process by application to the IPEA, containing personal data, including the selection process which took part, within three (3) business days from the day following publication of the results in the Official Gazette.
14. The top-ranked candidate will be invited to present financial proposal and negotiate the terms of contract reference.
- 14.1. At the negotiations stage the technical and methodological aspects of the services to be provided may be discussed and settled; as long as it does not change the object and/or loss of quality in final products.
- 14.2. The financial adequacy of the proposal will be considered by the Program Coordination Unit, considering the Ipea Ordinance No. 198 of October 29, 2014.
- 14.3. The values assigned to each of the products should be compatible with the following distribution:

<b>Products</b>	<b>Proportion of overall value</b>
Product 1	30%
Product 2	20%
Product 3	15%
Product 4	15%
Product 5	20%
<b>Total</b>	<b>100%</b>

15. In the event of negotiations not result an adequate technical and financial contract acceptable to both parties, IPEA will invite the next ranked candidate.
16. In order to hire the mentioned services, IPEA invites consultants to indicate their interest in relation to the provision of advisory services described.
17. Application is open to citizens from the eligible countries of Inter-American Development Bank, accordingly to its politics.
- 17.1. Brazilians candidates shall observe Brazilian Law nº 13.080/2015 (Lei de Diretrizes Orçamentárias), that forbidden contracting public employees.

18. For more information:

Institute of Applied Economic Research - IPEA

Program Coordination Unit - Institutional Development Board

SBS Quadra 1 Block J, BNDES Building, 5th Floor, Room 509, Brasília - DF, CEP: 70076-900

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E-mail: [cadastrodeconsultores@ipea.gov.br](mailto:cadastrodeconsultores@ipea.gov.br)

Site: [www.ipea.gov.br](http://www.ipea.gov.br)

Brasília/DF, November 12<sup>th</sup>, 2015.

**CARLOS ROBERTO PAIVA DA SILVA**  
**Coordenador do Programa Ipea Pesquisa**  
**Substituto**

ANNEX I

**Eligible Countries for Inter-American Development Bank countries**

(a) Borrower Countries:

(i) Argentina, Bahamas, Barbados, Belize, Bolivia, Brazil, Colombia, Costa Rica, Chile, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Suriname, Trinidad and Tobago, Uruguay and Venezuela

(b) Non-borrower Countries:

(i) Germany, Austria, Belgium, Canada, Croatia, Denmark, Slovenia, Spain, USA, Finland, France, Israel, Italy, Japan, Norway, Netherlands, Portugal, United Kingdom, Republic of Korea, China, Sweden and Switzerland

## ANNEX II

### **Context of the project**

“Knowledge Management and Repository: Implementation of the Intelligence Group”

#### **Introduction**

The aim of the project “Knowledge Management and Repository: Implementation of the Intelligence Group’ is to implement activities, managerial projects and research projects on the fields of Knowledge Management and Quality Management at Ipea. One of the activities related to Knowledge Management is the knowledge production, specifically that directed to strategic planning and decision making process

In this context, an initiative is the creation of an Intelligence Group to develop expertise at Ipea, to (1) produce strategic information to decision making and strategic planning processes; (2) keep an Intelligence system and an external environment monitoring, and (3) improve the Intelligence generation and Intelligence System by applied research.

The project proposes to offer cutting-edge knowledge in the Competitive and Economic Intelligence to Brazilian professionals and to stimulate debate, diffusion and knowledge exchange, focusing on methodologies, methods and techniques that compound the Intelligence field.

It’s expected to reach the objective by doing the lectures and workshops with Ipea’s employees, for discussion and knowledge transferring to appropriation of the project main themes. The Intelligence Report will also contribute to a greater dissemination of the contents and will be used as direction for capacitation on the future.

#### **Justification**

The Institute for Applied Economic Research (IPEA) has as institutional mission providing technical and institutional support to government actions, to formulate and reformulate public policy and programs to Brazilian development. Every year, it publishes a wide range of studies and applied researches, supporting plans, policies, programs preparation and decision making processes, contributing to expand governments performance and cooperating with government and international organizations within its field. This process happens articulated with civil society, involving economic, political and social networks, national and international.

To join and contribute to Ipea advanced development, the Intelligence Group, recently created, needs to train employees to performance these new functions. Considering that Ipea is a reference in its field, and given the fact of technological evolution that we experience, it’s crucial to know the borderline of knowledge of this new area.



Besides, it's important getting to know the informational needs in the research field for the public policy formulation and planning, sometimes unknown or unclear to the policy makers, justifying the Intelligence generation about this theme.

Ipea, that seeks the permanent innovation of its products, services and processes to achieve its forward looking vision and strategic objectives, invest in the creation of this group and await to bring the most modern on Intelligence framework, contributing to Brazil's development, by generating Intelligence and transferring knowledge to Ipea's employees.

## ANNEX III

### **Intelligence Report - model**

Structure elements:

- Title;
- Date and destination;
- Executive summary;
- Introduction, with objective and justification of the Intelligence generation;
- Methodology used;
- Results and analysis, with inputs to the work plan of implementation of a feasible Intelligence System, headed to producing of strategic information to internal use and to federal government.
- Inputs to stablishing of strategic partnerships;
- Conclusion and recommendations;
- References.