

PROCUREMENT NOTICE #028/2015

IPEA RESEARCH PROGRAM

INDIVIDUAL CONSULTANT - FOREIGN EXPERT EXCHANGE

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

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

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

Description of assignment: Hiring an individual consultant - foreign expert - to perform research and analysis about what is at the knowledge frontier in the areas of Competitive and Economic Intelligence, offering innovative methods and tools in this field of knowledge that contribute to the production of intelligence to support Ipea's decision-making and strategic planning processes.

1. The Institute of Applied Economic Research (IPEA) received funds from the Inter-American Development Bank (IDB) in order to contribute to better formulation, monitoring and evaluation of Brazilian public policies. To this end, strengthening shall be the IPEA's ability to improve production, organization and dissemination of knowledge on the challenges of the country's development indicating alternative solutions.
2. To this end, IPEA proposes to use part of the IDB resources for consultant selection to support the implementation of the Project 'Management and Knowledge Repository: Intelligence Center Deployment', which aims to generate and internalize knowledge about what is most modern in the Competitive and Economic Intelligence field. In this context, it is expected equip the IPEA with what is most advanced in this field of knowledge, thereby contributing to the production of intelligence to support decision-making and strategic planning processes at Ipea.
3. The work of the consultant aim to gather and analyze the frontier of knowledge at the Competitive and Economic Intelligence field, making available new methods and tools to support decision making process, strategic planning and Intelligence generation to Ipea.
4. 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.
5. The consultant shall:
 - 5.1. Produce a 'Discussion paper' within the project 'Knowledge Management: Center for Intelligence Deployment', which will contribute to greater diffusion of cutting-edge content raised by the consultant and will serve as guidance for future training within the Institute;
 - 5.2. Conduct a lecture in a seminar with the participation of national and international experts;
 - 5.3. Participate in workshop with IPEA employees, for discussion and knowledge transfer that fosters ownership of the main themes of the project.
6. It shall be subject to the following methodological and contractual aspects:
 - 6.1. The consultant work will be developed in conjunction with the project team;
 - 6.2. 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. Preparation and delivery of a 'Discussion paper' (preliminary version)						
2. Evaluations and corrections						
3. Delivery of the 'Discussion paper' (final version)						
4. Lecture in a seminar						
5. Enjoying the workshop						

- 6.3. The activities will be carried out in the consultant's office. THE Ipea be responsible for organizing the seminar and workshop;
 - 6.4. 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.
 - 6.5. The consultant should have willingness to face action for two (2) consecutive weeks, the last month of performance of the contract for participation in the seminar and workshop on Ipea's headquarters in Brasilia / DF;
 - 6.6. Any travel expenses, lodging and board for the provision of advisory services, if applicable, will be the responsibility and burden of the contracted consultant;
 - 6.7. Payments will be made by products delivery described in item 5 and approval by the project coordinator.
7. The products are:
- 7.1. Product 1: Preliminary version of the 'Discussion paper', containing the topics to be developed as model described in Annex III;
 - 7.2. Product 2: Final version of the 'Discussion paper' containing the topics to be developed;
 - 7.3. Product 3: Lecture in one-day seminar, at which time the results will be presented, to be held in Ipea's premises in Brasilia to the invited audience, lasting between 40-60 minutes followed by a debate. The content of the presentation, which has to be available in digital form, will contain the essential of Product 2;
 - 7.4. Product 4: Conduct a workshop for IPEA employees to be held at Ipea's premises in Brasilia, lasting 16 hours, maximum of 20 participants. In this workshop, the consultant will present in detail the results of the work and should also lead the workshop or the training to transfer the knowledge produced by addressing the main methods and techniques as well as a comparative analysis between them. The consultant will also participate in the round table debate, which will be available to discuss and answer questions about the theme and content of the 'Discussion paper' (Product 2), with the aim the better understanding of the products.
8. The consultant hired must meet the following requirements:
- 8.1. Mandatory requirements:
 - 8.1.1. Be foreign researchers come from eligible countries of the Inter-American Development Bank (Annex 1);
 - 8.1.2. Take effective action abroad, having no permanent visa in Brazil;
 - 8.1.3. Training at the doctoral level, for at least five years;
 - 8.1.4. Fluency in Portuguese or English;
 - 8.1.5. Willingness to face action in Brasilia for 2 consecutive weeks, to carrying out the presentations and workshops during the last month of contract.
 - 8.2. Desirable requirements:
 - 8.2.1. Expertise in the Intelligence area;
 - 8.2.2. Experience in capacity building in the Intelligence area;
 - 8.2.3. Publications on the subject in book format, chapters of books and academic journals with peer review system, classified in international systems;
 - 8.2.4. Participation in conferences, seminars, workshops in the Intelligence area.
9. The selection process will consist of analyzing the candidate's resumes and technical proposal.
- 9.1. The candidates that meet the mandatory requirements will be evaluated according to the following criteria.
 - 9.2. The Resume Evaluation is eliminatory and classificatory.

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

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

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

CRITERIA		SCORE	WEIGHT
EXPERIENCE IN THE SUBJECT AREA			
1	Publications on the subject in academic journals with peer review system, classified in international systems.	<ul style="list-style-type: none"> • No publication: 0 points • 1 to 5 publications: 2.5 points • 6 to 10 publications: 5 points • 11 to 15 publications: 7.5 points • Over 15 publications: 10 points 	4
2	Authoring of Published Book on the subject Note: if the candidate receives the scoring in this item, the corresponding chapters will not be considered in item 4.	<ul style="list-style-type: none"> • No publication: 0 points • 1 to 3 books: 2.5 points • 4 to 6 books: 5 points • 7 to 10 books: 7.5 points • Over 10 books: 10 points 	3
3	Organizing of Published Book on the subject Note: if the candidate receives the scoring in this item, the corresponding chapters can be considered in item 4.	<ul style="list-style-type: none"> • No publication: 0 points • 1 to 3 books: 2.5 points • 4 to 6 books: 5 points • 7 to 10 books: 7.5 points • Over 10 books: 10 points 	1
4	Chapter of books on the subject.	<ul style="list-style-type: none"> • No publication: 0 points • 1 to 3 books: 2.5 points • 4 to 6 books: 5 points • 7 to 10 books: 7.5 points • Over 10 books: 10 points 	1
5	Performance in organization (public or private) to maintain Intelligence activities, preferably in present period.	<ul style="list-style-type: none"> • Lack of performance: 0 points • Performance in this period: 2 points • 1-5 years of accumulated activity: 2 points • 6-10 years of accumulated activity: 4 points • 11-15 years of accumulated activity: 6 points • Over 15 years of accumulated activity: 8 points 	2
5	Participation in conferences, seminars, workshops in the area of intelligence.	<ul style="list-style-type: none"> • Lack of participation: 0 points • 1-5 participation: 2.5 points • 6-10 participation: 5 points • 11-15 participation: 7.5 points • Over 15 participation: 10 points 	1

9.3. The Evaluation of the Technical Proposal is eliminatory.

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

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

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

9.3.4. 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.

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

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

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

- 9.5. The candidate with higher scoring will be selected.
- 9.6. In case of tie, will be considered as tiebreakers: time experience and the largest volume of publications in the area.
10. Interested consultants must express interest as follows:
- 10.1. Forward documentation listed in item 8.3 by e-mail to the address cadastrodeconsultores@ipea.gov.br, up to 18 hours (Brasilia time) of December 10th 2015, indicating in 'Subject' the number of the Expression of Interest Request (028/2015) and the project name ('Knowledge Management and Repository: Implementation of the Intelligence Group').
- 10.2. 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.
- 10.3. At the moment of interest expression, the consultants should submit the following documentation:
- 10.3.1. Passport copy;
- 10.3.2. Curriculum vitae;
- 10.3.3. Titles and academic certificates;
- 10.3.4. Copies of publications in journals or internet links to access.
- 10.3.5. Certificates issued by a legal entity of public or private law or other documents with evidential value to demonstrate experience;
- 10.4. Expressions of interest which do not meet the prescribed manner will not be considered.
11. Candidates who express interest will be evaluated by a Judge Committee, consisting of three public officials, designated by the IPEA Research Program Coordinator.
12. The Judging Committee will evaluate the documentation submitted by the candidates, assigning the scores and choose the best candidate ranked.
13. 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.
14. 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.
15. The top-ranked candidate will be invited to present financial proposal and negotiate the terms of contract reference.
16. 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.
17. The financial adequacy of the proposal will be considered by the Program Coordination Unit, considering the Ipea Ordinance No. 198 of October 29, 2014.
18. The values assigned to each of the products should be compatible with the following distribution:

Products	Proportion of overall value
Product 1	20%
Product 2	25%
Product 3	25%
Product 4	30%
Total	100%

19. In the event of negotiations not result an adequate technical and financial contract acceptable to both parties, the IPEA will invite the next ranked candidate.
20. In order to hire the mentioned services, the IPEA invites consultants to indicate their interest in relation to the provision of advisory services described.

21. For more information:

Institute of Applied Economic Research - IPEA

Program Coordination Unit - Institutional Development Board

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Brasilia / DF, November 25th 2015.

ALEXANDRE SANTOS CUNHA
Coordinator of IPEA Research Program

ANNEX I

Eligible countries of the Inter-American Development Bank

(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) Austria, Belgium, Canada, Croatia, Denmark, Slovenia, Spain, USA, Finland, France, Israel, Italy, Japan, Norway, Netherlands, Portugal, United Kingdom, Republic of Korea, People's Republic of 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

Discussion paper – Model

The discussion papers follow the structure below and the models are available at: http://www.Ipea.gov.br/portal/index.php?option=com_alphacontent&view=alphacontent&Itemid=359.

Structure elements of the discussion paper:

- Title
- Authors
- Key-words
- Summary
- Abstract
- Introduction
- Literature review
- Methodology
- Results and analysis
- Conclusion
- References