

# CABEI



Central American  
Bank for  
Economic  
Integration

## Terms of Reference

**Leveraging Technologies to Support the  
Government of Costa Rica with the Development of  
a Climate-Smart Greenhouse and  
Commercialization Strategy**

Public Tender

015/2022

March/2022

## *Índice*

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Institutional Information .....	4
Terms of Reference Conditions .....	4
1. REQUIRED SERVICES .....	5
1.1 Background .....	5
1.2 Purpose or Objective .....	8
1.3 Scope of Work .....	9
1.4 General and Specific Experience Required from the Firm .....	13
1.5 Required Experience for the Work Team .....	13
1.6 Deliverables .....	14
1.7 Contract Term .....	15
1.8 Contract Implementation Schedule .....	15
1.9 Consultancy Obligations .....	16
1.10 Bank Obligations .....	16
1.11 Fees and Payment Methods .....	16
1.12 Immunities, Extensions and Privileges .....	17
1.13 Service Supervision Coordination .....	17
2. EVALUATION, CONTENT AND PRESENTATION OF BIDS .....	18
2.1 Bid Evaluation Procedure .....	18
2.2 Technical Evaluation 80% .....	18
2.3 Economic Assessment 20% .....	18
2.4 Bid Submission Method .....	19
2.5 Technical Bid Contents .....	19
2.6 Compliance Documentation .....	22
2.7 Economic Bid Contents .....	23
2.8 Bid Language .....	23
2.9 Bid Submission Procedure .....	23
2.10 Deadline for Submission of Bids .....	24
2.11 Inquiries, Deadlines and Coordination .....	24
2.12 Expression of Interest .....	25
2.13 Validity of bids .....	25
3. GENERAL NORMS .....	25
3.1 Performance Standards .....	25
3.2 Bank Rights .....	25

3.3	Reasons for Disqualification of Bids .....	26
3.4	Prohibitions .....	26
3.5	Protests or Appeals regarding the Public Tender .....	26
3.6	Confidentiality Clause .....	27
3.7	Acceptance of the Code of Ethics .....	27
3.8	Annexes .....	27

## **Institutional Information**

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The Central American Bank for Economic Integration (CABEI) is a multilateral financial development institution that aims to promote economic integration and balanced economic and social development in the Central American region, which includes the founding countries and the non-founding regional countries, serving and aligning itself with the interests of all its members.

CABEI was founded in 1960 as the financial arm of Central American integration and development; it is a unique organization, both as a result of the breadth of the fields of competence in which it carries out its operations and for its objective and foundational principles. Since then, CABEI has been led by visionaries, whose leadership has brought to fruition the ends for which CABEI was established.

CABEI has 15 member countries:

- Founding countries: Guatemala, El Salvador, Honduras, Nicaragua and Costa Rica.
- Non-founding regional countries: Panama, Dominican Republic and Belize
- Extra-regional countries: Mexico, Republic of China (Taiwan), Argentina, Colombia, Spain, Cuba and Korea.

CABEI is headquartered in Tegucigalpa, Honduras with regional offices in Guatemala, El Salvador, Nicaragua, Costa Rica, Panama, Dominican Republic, and the Republic of China (Taiwan). For further information visit the CABEI website, [www.bcie.org](http://www.bcie.org)

## **Terms of Reference Conditions**

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This Terms of Reference document is property of CABEI, and their content may not be reproduced by mechanical or electronic means, nor redistributed without the consent of the Institution.

In a reciprocal fashion, CABEI agrees not to reveal, copy or disclose the information provided by the bidders in response to this public tender.

These Terms of Reference do not oblige any natural or legal person to submit a proposal. Likewise, the presentation of proposals by the bidders does not oblige CABEI to enter into any contract.

These Terms of Reference, as well as the technical and economic proposal presented by the selected bidder, will become part of the annexes to the contract to be signed for the required services.

# 1. REQUIRED SERVICES

## 1.1 Background

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### 1.1.1. Current Challenges and Background

Historically, the agricultural sector in Central America (CA) has played a significant role in job creation, income generation, export promotion, and food security. The sector contributes 7.2% to GDP on average in the region, and accounts for 19% of the total employment on average. In terms of Costa Rica, the agricultural sector contributes 4.6% to the country's GDP and employs 12.5% of its workforce. Furthermore, agriculture is one of the top three sources of export income in Costa Rica, accounting for 22% of the country's total exports.

Costa Rica has experienced a steady increase in the intensity of extreme weather events over the recent decades. From 1988 to 2014, the country has experienced 42 extreme floods and droughts, which led to an estimated loss of USD \$461 million. The country also continues to face risks of rising temperature and abnormal weather patterns. In particular, the increasingly erratic and unpredictable patterns of seasonal rainfalls impose considerable damage to the agricultural production. As a result of increases in temperature and humidity, the spread of pests and diseases on coffee and banana products, such as black sigatoka and coffee rust, are of particular concern. Over the past five years, Costa Rica has experienced a reduction in yields on coffee beans by 10%. Such impacts are of grave concern as the country's agricultural sector depends heavily on the exportation of coffee and bananas, among others.

Currently, the agricultural sector in Costa Rica claims a share of 68% of water extraction. While Costa Rica is a water-abundant country, the compounded impacts of extreme weather events, land degradation, soil erosion, and water salinization increasingly call for the efficient management of water resources. This is particularly the case for the North Pacific Coast which is located within the Central America Dry Corridor, the region most exposed to drought in CA. Such climate change-induced damage to the agricultural production is projected to lower the contribution of agricultural sector to GDP by between 8% and 12% by 2100. The development of protected cultivation in greenhouses equipped with technologies to perform precision farming can strengthen the country's capacity to curve these climate change-induced negative impacts.

The global import value of fruits to South Korea has been rising sharply by an annual rate of 11.9%, with tropical fruits accounting for 63% of the increase. Moreover, South Korea has been boosting its import of tropical fruits from the countries in CA, namely Guatemala and Costa Rica. Agricultural exports to South Korea are expected to continue to increase following its signing of a free trade agreement with five Central American countries (hereinafter referred to as KCAFTA), which became effective from March 1, 2021.

The fourth industrial revolution has transformed how every market participant within the agricultural sector, from a family farmer to a global conglomerate, produces food and related products. The adoption of ICTs, including sensors, drones, robotics, geographic information systems, and automation devices, which allow the performance of innovative functions, such as precision

cultivation and vertical farming, has led to increased yields, lower costs, and reduced environmental impact.

One of the major applications of these smart farm technologies is for greenhouses, which can take various forms and styles, such as low-cost polyethylene film covered parral greenhouses, plastic-covered industrial-type greenhouses, and glasshouses. The climate-smart greenhouses are the conventional greenhouses equipped with various technology options, such as sensors, actuators, automated irrigation system, and data management platform, among others. This protected environment of climate-smart greenhouses with advanced technologies can protect plants from harsh environmental conditions and increase crop yields up to 12% as compared to the yields from traditional farming.

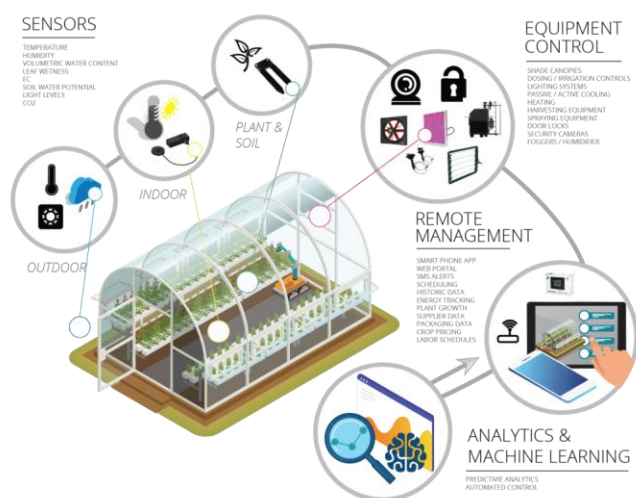


Figure 1. Greenhouse climate control systems

Climate-smart greenhouses, by leveraging ICT, allow agricultural producers to monitor the crops and take necessary actions from remote locations without human intervention, such as cooling, heating, lighting, watering, and ventilating. This automated remote control is made possible via sensors, actuators, and cloud computing. The sensors detect, measure or indicate a specific physical quantity such as light, heat, motion, moisture, and pressure, and send the collected data to a cloud computing or data management system. The data platform then triggers actuators to perform tailored actions to address the detected problems. This data processing system also aids the farmers to easily gain knowledge and early warnings about harvest timing, soil quality, leaf conditions, water stress, and the amount of fertilizers or nutrients needed.

### 1.1.2. Social & Economic Impact

The deployment of climate-smart greenhouse technologies is expected to serve two important purposes, climate adaptation and production enhancement. Leveraging such technologies may increase productivity by 40%, quality by 30%, and decrease the labor cost by 60%, hence increasing the total income by 60%. Furthermore, it can help overcome climate-related risks by controlling solar radiation, temperature, humidity, and moisture, which leads to healthy production and diversification of agricultural products.

Latin America commercial greenhouse market was worth USD \$5.02 billion in 2020 and estimated to be growing at a compound annual growth rate of 6.53% to reach USD \$8.15 billion by 2025. With the

implementation of climate-smart greenhouses, several agricultural products experienced considerable export growth, including tomatoes, cucumbers, chili peppers, strawberries, mangos, bananas, lemons, and avocados. Moreover, there has been a steady increase in the demand for flowers in international markets. For instance, the United States has doubled its importation of cut flowers in the last 20 years from USD \$800 million to USD \$1.9 billion. In 2017, exports of cut flowers from Costa Rica were equal to USD \$31 million, with the export value of USD \$28 million to the United States. The introduction of climate-smart greenhouses to Costa Rica can allow it to reap the benefits from such export trends in international markets.

Given that pests and diseases cause an annual loss of 20 to 40 percent of global crop production, utilization of climate-smart greenhouses can be the most effective and cost-efficient methodology for addressing such concern. Climate-smart greenhouses create an optimal environment for mitigating plant diseases and provide farmers early warnings and solutions to prevent pest infestation and disease transmission. According to the study, climate-smart pest management can increase crop yields up to 41%, reduces pesticide use by an average of 31%, and increase net returns. With the climate-smart greenhouse technologies, the reduction of costs in the ex-post management of pests and diseases, along with the yield growth, can offer considerable amount of savings for small and medium-sized farms.

### **1.1.3. Linkages to Bank Financing**

In line with the Climate Smart Agriculture Strategy for the SICA Region 2018-2030, the Government of Costa Rica has made climate change and agro-environmental management a national priority. This is explicitly established in the State Policy for the Agri-Food Sector and Territorial Rural Development (2010-2021) and the Policy Guidelines for the Agricultural, Fishing and Rural Sector (2019-2022), aimed at minimizing climate-induced risks on the production of goods and services by strengthening the capacity of institutions and producers. In particular, the country has prioritized facilitating the commercialization and marketing of agri-food produced by small and medium-sized farms. A vision for developing climate-smart greenhouses in Costa Rica closely resonates with its national strategy to create opportunities for small and medium-sized farms to adopt climate resilience and efficient methodologies.

Agricultural credit represents 2.5% of the total loans provided through public or private banks in Costa Rica, and around 14% of farmers receive credit or financial services. Despite the limited credit access, some local institutions such as the National Institute for Rural Development (INDER) and Fundecooperación have been actively providing microfinancing options to farmers of small and medium-sized plots and achieved noticeable progress with their applications and investments. Furthermore, this project would plant the seeds for future financing opportunities for developing large scale climate-smart greenhouses to support agrobusinesses expand their productive capabilities.

### **1.1.4. Relevance to KTF & South Korean Visibility**

South Korea has been one of the key players in the smart farming industry. Since 2017, the country has successfully supplied smart farm technologies to 4,500 hectares of local horticulture land as test beds, and it plans to expand the scale to 7,000 hectares by 2022. South Korea has made major technological advancements in leveraging cloud computing platforms, sensors, and automation devices to remotely control temperature, humidity, solar radiation, and CO2 levels in greenhouses, based on the collected data on climatic, soil, and plant conditions. Furthermore, the country

established an optimal growth model for tomatoes through R&D, and similar research has been underway for strawberries, bell peppers, and cucumbers to allow export of these high-quality seeds, along with smart farm technologies.

As part of Korean Digital and Green New Deals, South Korea plans to invest 386.7 billion won (approximately USD \$350 million), on developing smart farms over the next seven years, and also to establish smart-farm innovation valleys by 2022. In addition, the Ministry of Agriculture, Food and Rural Affairs (MAFRA) has allocated a budget of 47.3 billion won for Smart-Farm Package Export Promotion Program in 2021, nearly a sixfold increase from 8 billion won in 2020. This TC would allow for more opportunities for Korean firms to showcase their technologies and knowhow and play a crucial role in both the consulting and deployment of climate-smart greenhouses.

#### **1.1.5. Alignment with CABEL's Strategy**

This TC is aligned with the Bank's 2020–2024 Strategic Framework: i) Sustainable Competitiveness Axis which seeks to intervene in strengthening the economic, social and institutional factors that determine regional competitiveness, ii) Human Development and Social Inclusion Axis, which generates social capacities that lead to achieving the objective of improving the well-being and the quality of life of the Central American region, and iii) Environmental and Social Sustainability Transversal Axis, through the approval of programs and projects in favor of social appropriation and that address the need to preserve the environment.

## **1.2 Purpose or Objective**

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- 1.2.1. The objective of this Technical Cooperation (TC) is to support the Government of Costa Rica (GOCR) with the development of climate-smart greenhouses and commercialization strategy by leveraging information and communications technologies (ICT). This TC shall assess the effectiveness and efficiency of climate-smart greenhouse for reducing vulnerability to climate change and increasing productivity and market value of agricultural products, through a feasibility study and pilot deployment. The data on crop production within the pilot climate-smart greenhouses shall be continuously collected, processed, and stored via the deployed software platform, even after the project closure. The evidence obtained from the study and the pilot project shall be utilized to support operation and maintenance of climate-smart greenhouses, improve agricultural sector's adaptive capacity, and provide small, medium- or large-agribusinesses with opportunities to increase the export value of their products for international markets.
- 1.2.2. The Consulting Firm which will be referred to in this document as the "Firm" is to conduct a feasibility study that is composed of market and commercial analysis and detailed feasibility study and design of the pilot for climate-smart greenhouse. Based on the study, the Firm shall perform the deployment of pilot climate-smart greenhouses and smart farm technologies in two (2) pre-selected locations with dissimilar environmental conditions, Los Diamantes (EELD) and Carlos Durán (EECD). These two locations currently operate experimental stations for research and development (R&D) on agricultural production (see Figure 2), which provides an optimal environment for pilot-testing climate-smart greenhouse technologies. The Firm shall also engage in the transfer of knowledge and technical skills to strengthen the capacity of key public and private stakeholders.



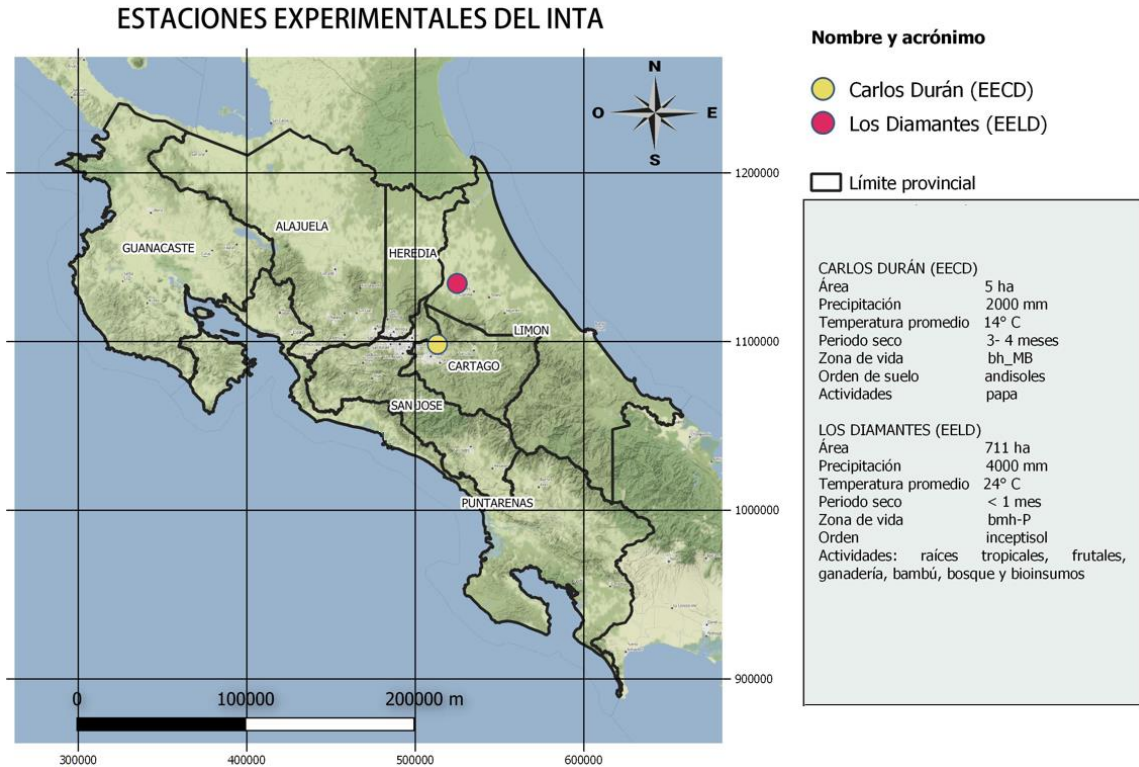


Figure 2. Map of Experimental stations Carlos Duran and Los Diamantes

1.2.3. To achieve this objective, the following tasks shall be undertaken:

- i. Feasibility Study on Development of a Climate-Smart Greenhouse
- ii. Deployment of Pilot Climate-Smart Greenhouses and Smart Farm Technologies
- iii. Capacity Building

## 1.3 Scope of Work

The Firm shall carry out all the tasks to achieve the Objective of the Service described in Section 1.2, and for this purpose, the Project was divided into three (3) components where each concludes with the fulfillment of a milestone or intermediate objective. The Firm will be responsible for completing the activities of each component as detailed below.

**1.3.1. Component 1: Feasibility Study on Development of a Climate-Smart Greenhouse.** This component shall consist of the following two sub-components. Upon completion of the activities under this Component, knowledge transfer meetings, workshops or forums will be held to validate the findings with LIA counterparts

**1.3.1.1. Sub-component 1.1: Market and Commercial Analysis.** This sub-component entails a detailed assessment of existing challenges, analysis of market demand and opportunities for climate-smart agricultural technologies, selection of agricultural products for pilot deployment, and development of commercial strategies in Costa Rica. This analysis shall provide baseline information for evaluating the commercial viability, sustainability, and effectiveness of climate-smart greenhouse in the long term.

- i. Analyze the local, regional, and international agricultural market to identify high-value crops that can leverage climate-smart greenhouse technologies. The identified crop has to take into account the specific environmental characteristics of the locations of the pilot- Los Diamantes and Carlos Duran.
- ii. Estimate the domestic market demand for climate-smart greenhouse technologies in Costa Rica.
- iii. Elaborate on the characteristics of the agricultural market participants in the country, especially farmers, wholesale and retail buyers, and consumers, among others.
- iv. Diagnose the challenges and opportunities of adopting climate-smart greenhouse technologies within the current agribusiness value chain.
- v. Identify three (3) high-yielding and price competitive agricultural products that have a competitive advantage in the value chain and a comparative advantage in export, for cultivation and study in the proposed climate-smart greenhouse. The identified crop has to take into account the specific environmental characteristics of the locations of the pilot- Los Diamantes and Carlos Duran.
- vi. Analyze the current production capacity and yield quality, amongst other factors, for the products identified in the previous activity to generate a baseline data to measure the results after the proposed intervention.
- vii. Conceptualize and develop high-value commercialization strategies for the selected agricultural products, i.e., issuance of sustainability certification.
- viii. Recommend best practice agribusiness models to increase bankability and sustainability of climate-smart greenhouse investments.
- ix. Propose institutional arrangements or Public-Private Partnerships (PPP) models to support agribusiness SMEs and farmers in gaining access to a larger scale of climate-smart technologies and greenhouse facilities to ensure long-term sustainability.

**1.3.1.2. Sub-component 1.2: Detailed Feasibility Study and Design of the Pilot for Climate-Smart Greenhouses.** This sub-component is aimed to design specific interventions, recommend best-fit technology solutions, define optimal technical specifications, provide operations and maintenance guidelines, and develop a roadmap for implementation of climate-smart greenhouses. This study shall also include a cost-benefit analysis and environmental and social impact assessment.

- i. Design a pilot project to deploy climate-smart greenhouses in two (2) pre-selected locations, namely Los Diamantes and Carlos Durán, with the size of 750 square meters each, suitable for cultivating one or all three (3) crops identified in the previous component.
- ii. Conduct site visits to collect data and pertinent information from relevant authorities.
- iii. Review the climate and environmental conditions in the project sites, such as soil composition, temperature, wind direction and speed, air quality, precipitation, altitude, humidity, radiation, ground slope, and resource access, among others.
- iv. Assess challenges and bottlenecks that may hinder the construction and sustainable management of climate-smart greenhouses.
- v. Identify and elaborate on the technologies that can be applied to the pilot climate-smart greenhouses, based on the market and commercial analysis that considers various value chains and the selected production type, size, and value.
- vi. Recommend the hardware and software tools that would be applicable for all crops identified, allowing for precision farming to improve energy efficiency, production quality, yield quantity, and labor efficiency, and for data collection, processing, and

- vii. storage, in consideration of external environmental factors for each pilot site.
- viii. Define technical requirements and specifications for climate-smart greenhouses most appropriate for each pilot site, taking into account the required conditions of the identified crops, including their covering materials, control equipment, sensors, actuators, irrigation system, and cloud computing or data management platform.
- ix. Assess the existing road access, digital connectivity, energy, and water infrastructure within the area of intervention and recommend improvements to ensure successful integration and utilization of the proposed solutions.
- x. Conduct an analysis of costs associated for the selected crop production, as well as construction of pilot climate-smart greenhouses, including the frame, covering materials, automated devices, sensors, irrigation system, data management platform, and other hardware and software.
- xi. Provide a detailed budget for the deployment of the pilot climate-smart greenhouses recommended within this TC.
- xii. Develop an economic-financial model with an estimation of the capital expenditure (CAPEX), operating expenditure (OPEX), internal rate of return (IRR), net present value (NPV), weighted average cost of capital (WACC), Cost Benefit Analysis (CBA) and sensitivity analysis for the crop production in the proposed climate-smart greenhouse.
- xiii. Review environmental laws and regulations in Costa Rica which are relevant to the construction and operation of climate-smart greenhouses.
- xiv. Develop an Environmental and Social Management Plan (ESMP) that identifies and considers potential project impacts on the environment and community within the area of influence.
- xv. Present a detailed plan of action for the design, construction, operation, performance evaluation, closure, and handover of the pilot climate-smart greenhouses.
- xvi. Suggest a mid- and long-term plan for utilizing the pilot climate-smart greenhouses for research and development (R&D), based on the result of pilot production.
- xvii. Develop a plan and strategy for stakeholder consultation, community engagement, and public participation during the entire project cycle.
- xviii. Develop a detailed blueprint for the construction of two (2) climate-smart greenhouses with equipment and technology options identified in the previous component.
- xviii. Identification and engagement of local partners to support deployment of the proposed greenhouses.

1.3.2. **Component 2. Deployment of Pilot Climate-Smart Greenhouses and Smart Farm Technologies.** This component entails the construction and HW/SW integration of climate-smart greenhouses in two (2) pre-selected locations with dissimilar climate conditions and the transfer of optimal technologies and equipment. Knowledge transfer meetings, workshops or forums will be held to validate the reports, demonstrate the pilot climate-smart greenhouses, and share South Korea's best practices with LIA counterparts.

- i. Engage with local facilitators to ensure the access to energy, water, and broadband, and initiate construction activities in coordination with the Government of Costa Rica.
- ii. Arrange the purchase and shipment of all construction materials and greenhouse equipment and technologies, in consideration of two (2) different project sites. It is important to ensure most of the materials used in the deployment of the pilot, such as the greenhouse materials, sensors and installed devices can be acquired in Costa Rica or are easily for ease of operations and maintenance.

- iii. Lead all phases of design, engineering, procurement, construction, commissioning, testing, operator training, and handover processes for the proposed pilot project to ensure that local producers are capable of utilizing the technology for data-based decision making throughout the entire production and commercialization cycle.
- iv. Perform oversight over the construction and operation of the pilot climate-smart greenhouses through the physical presence at the project site.
- v. Provide operation and maintenance manuals with regard to all technologies utilized in the climate-smart greenhouses.
- vi. Develop a mid- and long-term plan for monitoring and evaluation of the performance and impact of climate-smart greenhouse.
- vii. Test HW/SW equipment by conducting agricultural production activities for at least 1 identified crop for each pilot site for a period of 1 production cycle, in accordance with INTA's recommendations. The crop must be different for each site.

1.3.3. **Component 3: Capacity Building.** This component shall focus on strengthening the institutional capacity of key public and private stakeholders to implement and administer the proposed intervention. Capacity building activities entail on-the-job training for local agricultural producers to acquire skills and knowledge on the operation and maintenance of climate-smart agriculture technologies. Moreover, activities will consist of translation of all deliverables from English to Spanish, and English-Spanish interpretation for the training sessions.

- i. Disseminate the initial results of the pilot climate-smart greenhouse and organize workshops to validate agronomic, economic, social, and environmental findings and recommendations.
- ii. Share South Korea's best practices and lessons learned with respect to the implementation and management of smart farms, promote opportunities to enter the agricultural market in South Korea, and engage with stakeholders who are key to the commercialization phase of the agricultural value chain.
- iii. Execute public consultations with key stakeholders, such as government agencies, local farmers associations, and private companies.
- iv. Assess the capacity and training needs of LIAs and other key stakeholders.
- v. Design a capacity building program detailing the timeline, content, human resources, audience, and delivery of the on-the-job training sessions.
- vi. Based on results of previous components and activities, train project beneficiaries and stakeholders on the methodology for the operations and maintenance of technologies, utilizing the manuals developed.
- vii. Administer a post-training survey to evaluate and confirm the improvement of participants' knowledge and skills.
- viii. Ensure effective handover of the pilot climate-smart greenhouses with the mandate of periodic monitoring and evaluation for impact assessment and sustainability.
- ix. Transfer knowledge to the INTA, small, medium, and large agribusinesses as well as Bank personnel regarding the climate-smart agriculture project.

1.3.4. **Engagement Requirements.**

- i. Ensure that all meetings for the purpose of this consultancy are conducted in Spanish language or in English with Spanish interpretation.
- ii. Ensure all deliverables are submitted in both professional level English and Spanish.
- iii. Incorporate a local specialist to support the execution of the project.

- iv. Provide two (2) year warranty and after sales customer and technical care inquires up from the date technologies have been deployed.
- v. Make available one specialist to support INTA complete one (1) agricultural/ production cycle for each site.

## **1.4 General and Specific Experience Required from the Firm**

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1.4.1. **General Experience:** The Firm serving as the prime bidder must be of South Korean nationality and must have a team of professionals with proven experience and expertise. Consultants who work for the Firm must have availability to work exclusively and full-time during the required period, and conduct site visits, provided that the visit will be feasible without any COVID-19 related restriction. At least 50% of the team must consist of South Korean experts.

1.4.2. **Specific Experience:** The Firm must present **three (3)** most relevant experiences in consultancy over the past 10 years, with the following conditions:

- i. Experiences most similar to this project (i.e. market studies, deployment of greenhouses and climate smart agriculture HW/SW) will be highly valued.
- ii. Experiences in LAC region will be highly valued.
- iii. Experiences beyond 10 years will not be valued.

Specific details of the project activities and outputs to illustrate the firm's capabilities will be highly valued.

1.4.3. **Consortiums/Joint Ventures (JV):** Forming an association with local, regional, and/or international consulting firms or individual subject matter expert(s) with experience within the sector, local expertise, and native Spanish language skills, will be highly valued:

- i. Firms may form consortiums with local, regional, and international firms, with a condition that the Korean Firm must serve as the prime bidder.
- ii. Firms may subcontract components to local, regional, and international firms or individual consultants and must highlight their activities and contributions.

## **1.5 Required Experience for the Work Team**

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1.5.1. The key members of the team to be offered by the Firm must be composed of the following expert professionals, including at least one expert who possesses Spanish language skills:

- i. Project Manager
  - General Experience: 10 years of work experience as a project leader or project manager within the agriculture sector
  - Specific Experience: At least three (3) consultancies on climate-smart agriculture and agribusiness development
- ii. Agriculture Business Expert
  - General Experience: 10 years of work experience within the agriculture sector
  - Specific Experience: At least three (3) consultancies on agricultural export, global

value chains, and/or agribusiness development

- iii. Climate-Smart Greenhouse Specialist
  - General Experience: 10 years of work experience within the agriculture sector
  - Specific Experience: At least three (3) consultancies on greenhouse development and horticulture production, with past experiences in geographic and cartographic analysis of production areas
- iv. ICT Specialist
  - General Experience: 10 years of work experience in the ICT sector
  - Specific Experience: At least three (3) consultancies on the deployment and installation of technologies for agriculture sector
- v. Financial Analyst
  - General Experience: 10 years of work experience within the economic and/or financial sector
  - Specific Experience: At least three (3) consultancies on economic and financial analysis for the agricultural sector
- vi. Local Support Staff
  - General Experience: Resident of Costa Rica with 10 years of work experience
  - Specific Experience: At least two (2) consultancies in the ICT or agriculture sector

1.5.2. The bidder may incorporate other specialists that are not previously mentioned to ensure successful completion of the project.

1.5.3. It is not a requirement to identify a local partner to deploy the proposed greenhouses in the technical proposal. Nevertheless, a local partner must be engaged with during Component 1 of the project. The bidder may include the local partner in the bidding document, if already identified, as a consortium member or subcontractor.

## 1.6 Deliverables

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1.6.1. The expected outcomes of this TC are a feasibility study on the development of climate-smart greenhouse, which entails market and commercial analysis and detailed design of the pilot climate-smart greenhouses. Based on the findings and recommendations from the feasibility study, the TC will commence the deployment of pilot climate-smart greenhouses in two (2) pre-selected locations with dissimilar climate conditions, Los Diamantes and Carlos Durán. The sustainable operation and management of the pilot climate-smart greenhouses is expected to further stimulate agricultural R&D and help to increase the export value of products cultivated in climate-smart greenhouses.

1.6.2. The TC will also provide a design of capacity building program and its delivery to strengthen institutional capacity of key public and private stakeholders and to transfer knowledge and technical skills to local agricultural producers for the operation and maintenance of smart agriculture technologies. The increased capacity and practices of climate-smart agriculture

shall strengthen adaptive capacity and resilience of the agriculture sector and improve the productivity, nutritional value, and quality of agricultural products in Costa Rica.

1.6.3. As part of the description of required services, the deliverables are listed below:

- i. Inception report detailing methodology, workplan, timeline, etc.
- ii. Report #1: Market and commercial analysis
- iii. Report #2: Detailed feasibility study and design of the pilot for climate-smart greenhouses
- iv. Pilot #1: Deployment of pilot climate-smart greenhouses in Los Diamantes and Carlos Durán
- v. Report #3: Initial progress report on the deployment of pilot greenhouses
- vi. Report #4: Interim progress report on the deployment of pilot greenhouses
- vii. Report #5: Operations and maintenance manual
- viii. Report #6: Design of a capacity building program detailing timeline, content, etc.
- ix. Report #7: Final report on the completion of pilot greenhouses and agriculture production results vs baseline for each zone after completion of 1 agricultural cycle
- x. Event #1: Capacity building workshops for technology training
- xi. Event #2: Final Dissemination Workshop to validate final report

1.6.4. Travel: a minimum of three (3) trips is required for the project. In particular, it is required for the team to have extended presence on the ground while conducting the study, constructing the climate-smart greenhouses, and delivering the capacity building workshops.

## 1.7 Contract Term

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- 1.7.1 The term of the contract will be for a period of eighteen (18) months counted from the last signature date of the contract.
- 1.7.2 Whenever there are causes of force majeure or fortuitous events that justify it, and there is an agreement between INTA, CABEI and the Consulting Firm regarding the causes, the term may be extended for a reasonable time deemed necessary for it to satisfactorily conclude the contracted services.
- 1.7.3 The Bank reserves the right to unilaterally conclude the service contract without any responsibility on its part, if it is verified that the Consulting Firm, is not adequately executing any of the tasks set forth in the Technical Proposal and Terms of Reference or when the contracted services do not conform to or comply with them.

## 1.8 Contract Implementation Schedule

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Components 1, 2, and 3 are to be executed by the South Korean consulting firm. These activities are described in the timeline below:

**Timeline for Project Execution for a South Korean Firm**

Component 1: Feasibility Study on Development of a Climate-Smart Greenhouse Component 2: Deployment of Pilot Climate-Smart Greenhouses and Smart Farm Technologies Component 3: Capacity Building																			
Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	Duration
	2022							2023											
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	
Component 1	■	■	■	■	■	■													6 months
C1 Knowledge Transfer						■													1 day
Component 2							■	■	■	■	■	■	■	■	■				9 months
C2 Knowledge Transfer															■				1 day
Component 3																■	■	■	3 months

## 1.9 Consultancy Obligations

The Firm will be accountable for:

- 1.10.1 Complying with the Terms of Reference, technical offer, economic bid, and other conditions that are expressed in the corresponding contract.
- 1.10.2 Accepting CABEI’s supervision and oversight as applicable and addressing CABEI’s observations and/or recommendations.
- 1.10.3 Committing to apply the necessary security and biosecurity measures to ensure access to the facilities only to authorized personnel. (If necessary)

## 1.10 Bank Obligations

CABEI will be responsible for:

- 1.11.1 Providing the information (verbal or written) and documentation necessary for the preparation of the analyses and research required within the framework of the services requested.
- 1.11.2 Specify and/or provide a workspace to carry out the activities necessary for the fulfillment of the contracted services.

## 1.11 Fees and Payment Methods

- 1.11.1 The bank has a budget for the project of up to **Six Hundred and Fifty Thousand United States Dollars (US\$650,000.00)**.



1.11.2 The Bank will pay for the services pursuant to the provisions of the signed contract in United States Dollars or in the currency that is deemed most convenient.

1.11.3 The economic bid must include all expenses related to the trips to be made.

1.11.4 The prices presented by the bidders are their sole responsibility; any omission will be interpreted as voluntary and tending to obtain prices that allow it to present a more advantageous offer.

1.11.5 The payment indicated in numeral 1.11.1 will be effective by CABEI as below detail:

- i. **Payment No. 1:** Thirty percent (30%) of the total amount, upon the delivery and approval of the Inception Report for the engagement within two (2) weeks of signing the contract.
- ii. **Payment No. 2:** Thirty percent (30%) of the total amount, upon the delivery and approval of Reports #1 and #2 detailed in section 1.6.3. of the Deliverables within six (6) months of signing the contract.
- iii. **Payment No. 3:** Twenty percent (20%) of the total amount, upon the delivery and approval of Reports #3-6, Pilot #1, Event #1 detailed in section 1.6.3. of the Deliverables within twelve (12) months of signing the contract.
- iv. **Payment No. 4:** Twenty percent (20%) of the total amount, upon the delivery of Reports #7 and Event #2 detailed in section 1.6.3. of the Deliverables within eighteen (18) months of signing the contract.

The bidder may propose an alternative payment arrangement in a separate document within the economic bid, which will be reviewed by CABEI who will then determine whether to accept or propose different alternatives.

1.11.6 CABEI fulfills its payments by means of wire transfers; the bidder must provide the name of the banking institution and account number. The authorization will be carried out pursuant to the instructions contained in Annex 2.

## **1.12 Immunities, Extensions and Privileges**

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Pursuant to its constitutive agreement, CABEI, its income, and all assets, as well as the operations and transactions that it carries out in accordance with said agreement, will be exempt from all kinds of tax and customs duties or others analogous in nature. It is also exempt from all responsibility related to the payment, withholding or collection of any tax, contribution or right; consequently, the taxes and other contributions that correspond to the Contractor derived from the fees caused will be its own responsibility.

## **1.13 Service Supervision Coordination**

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The coordination and supervision of the services will be carried out by Bank's Public Sector Department/Division.

## 2. EVALUATION, CONTENT AND PRESENTATION OF BIDS

### 2.1 Bid Evaluation Procedure

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The bids will be evaluated using a rating system, where there will be two types of qualification: technical and economic, totaling 100%.

### 2.2 Technical Evaluation 80%

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2.2.1 The technical evaluation aims to evaluate CABEI's satisfaction with the compliance of the characteristics of the services to be contracted and the relevant aspects to be met by the Firm.

2.2.2 Although the technical evaluation has a total value of 80%, to obtain the technical qualification, according to the evaluation criteria, the total value of 100% will be used. This result will then be weighted on the value of the technical evaluation (80% of 100%).

2.2.3 The criteria and weights to be used to carry out the technical assessment are as follows

Evaluation Criteria	Percentage
General Experience	10%
Specific Experience	15%
Key Staff qualifications and competence for assignment	20%
Subject matter expertise in the region and language	15%
Technical approach, methodology and work plan	40%
<b>Total Technical Evaluation Score</b>	<b>100%</b>

2.2.4 In order for the offer submitted to be technically acceptable, it must obtain a minimum rating of 80%; i.e. 80%/100% of the total technical assessment; or 64%/80% of the weighted technical rating. A bid that does not meet that score will be disqualified from the process.

### 2.3 Economic Assessment 20%

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2.3.1 The economic assessment shall assign the maximum weight of 20% to the lowest cost economic bid.

2.3.2 The rest of the proposals will be assigned a weight as follows:

$P_i = (E_m * [20]) / E_i$	$P_i$ = Economic Proposal Score i. $i$ = Bidder. $E_i$ = Economic Proposal i. $E_m$ = Economic Proposal with lowest cost or price.
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2.3.3 The sum of the technical and economic evaluation will result in the final qualification that will serve as the basis for the award.

## 2.4 Bid Submission Method

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2.4.1. The offer must consist of three (3) duly identified sections:

- a. Technical bid
- b. Compliance documentation
- c. Economic bid

## 2.5 Technical Bid Contents

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The technical offer must contain the following documents, which must be submitted in the following order:

2.5.1. Letter of Presentation (Annex 1) duly stamped and signed by the legal representative. **If the Bank's template is not used, the offer shall be disqualified.**

2.5.2. Payment Instructions Template (Annex 2) duly completed.

2.5.3. Technical Offer: **Length of proposal must not exceed a maximum of 80 pages**

**a. Overview of Consulting Firm**

- i. Provide here a brief description of the background and organization of your company, and – in case of a JV – of each member for this assignment.

**b. Experience of Consulting Firm**

- i. List only **three (3)** relevant projects that highlight your capabilities to execute this project. References must be relevant to this engagement and successfully completed within the previous 10 years. **Experiences beyond 10 years will not be valued. Experiences in Latin America are highly valued.**
- ii. List only those assignments for which the organization was legally contracted as a company or was one of the JV partners. Assignments completed by the Consulting Firm's individual experts working privately or through other consulting firms

cannot be claimed as the relevant experience of the Firm that is a primary bidder. Experiences of Consortium member or JV partners may be claimed. The Firm should be prepared to substantiate the claimed experience by presenting copies of relevant documents and references if so requested by the Bank.

- iii. Include full contact details (country of assignment, name of the referee, title, organization, address, email, and phone number).
- iv. Provide a detailed description of the performed activities, main deliverables and outputs for the three (3) references to be presented in the proposal.

Name of the project: [e.g., Improvement of ...]			Reference No. 1/3
Sector		Country	
Name of funding organization			
Full contact details	name/title/email/ phone #/address		
Name of the client/ beneficiary			
Full contact details	name/title/email/ phone #/address		
Role in the assignment	[e.g., Lead partner in a JV A&B&C]	Total contract value (USD)	Ie. 100,000
Name of consortium partner	(e.g, firm B	Firm's share of contract value	Ie. 75000
Detailed description of the performed activities:			
Description of the deliverables (outputs):			
Other relevant information:			
E.g., end results, detailed description of consultancies for pilot project, workshops, training, conferences, etc. (if any)			

**c. Work Plan**

- i. Project Understanding, Technical Approach, and Methodology. [Please explain your understanding of the objectives of the assignment as outlined in the Terms of Reference (TOR), the technical approach, and the methodology you would adopt for implementing the tasks to deliver the expected output(s); the degree of detail of such output; and describe the structure and composition of your team. Please do not repeat/copy the TORs in here.]
- ii. Implementation Plan. [Please outline the plan for the implementation of the main activities/tasks of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Bank), and tentative delivery dates of the reports. The proposed work plan should be consistent with the technical approach and methodology, showing understanding of the TOR and ability to translate them into a feasible working plan and work schedule showing

the assigned tasks for each expert. A list of the final documents (including reports) to be delivered as final output(s) should be included here. The work plan should be consistent with the Project Timeline and Deliverables Form.]

- Provide a timeline for this project with milestone-deliverables end dates with the breakdown for activities, delivery of reports, and benchmarks and other requirements, such as the Bank’s approvals. Advice if any areas of the project timeline are critical path and/or require Bank commitment to a deadline.
- For phased assignments, indicate the activities.
- Include a legend, if necessary, to help read the chart

iii. Staffing & Personnel.

- Team composition, assignment, and key experts’ inputs: Identify the project manager/team leader for this effort and provide the composition of the proposed team.
- Provide each team member’s name, position, nationality, duration of relevant work experience in the field assigned for this assignment, specific activities undertaken for each relevant project completed in the past, etc.

iv. Comments (on the TOR and on counterpart staff and facilities). Present and justify here any modifications or improvement to the terms of reference you are proposing to improve performance in carrying out the assignment such as deleting some activity you consider unnecessary or adding another or proposing a different phasing of the activities. Suggestions should be concise and to the point. Please also include comments, if any, on counterpart staff and facilities to be provided by the Bank. For example, administrative support, office space, local transportation, equipment, data, background reports, etc.

d. **Curriculum Vitae:** Resumé of the professionals or specialists who will be in charge of the service.

Position Title	[e.g., TEAM LEADER]		
Name of Expert:	[Insert full name]		
Country of Citizenship/ Residence			
Education	List university or other specialized education, dates attended, degree obtained		
<b>Employment record relevant to the assignment:</b> [Starting with present position, list in reverse order your past experience. Please provide dates, name of employing organization, titles of positions held, types of activities performed and location of the assignment, and contact information of previous clients and employing organization(s) who can be contacted for references. <b>Past employment that is not relevant to the assignment does not need to be included.</b> ]			
Period	Employing organization and your title/position. Contact information for references.	Country	Summary of activities performed relevant to the assignment.

[e.g., May 2005-present]	[e.g., Ministry of Economy and Finance, advisor / consultant to... For references: Tel. 010-xxx-xxxx/e-mail. xxx@xxx.com; Mr.xxxxx, deputy minister]		
<p><b>Summary of specific projects undertaken that best illustrate capabilities to conduct this assignment.</b> List in reverse order the most relevant assignments that the expert has undertaken that will showcase their ability to successfully execute this project. <b>All relevant previous experiences can be listed and experiences beyond 10 years will be valued.</b> Please provide the project period, location, sector, client, and position held, as well as a detailed description of activities performed to complete the assignment which best illustrates the expert's capability to successfully handle this assignment.</p>			
Assignment 1: [Name of the assignment]			
Sector: ICT	Description of activities performed:	Description of outputs:	
Period/ Duration: Jan'19- Feb '21			
Location:			
Client:			
Assignment 2: [Name of the assignment]			
Sector: ICT	Description of activities performed:	Description of outputs:	
Period/ Duration: Jan'19- Feb '21			
Location:			
Client:			
Language Skills			
Contact information			

**Note: The detailed information in this section must be submitted in its totality. In the event the information is not submitted, the offeror will lose the assigned score for that specific criterion.**

**Side notes:**

- **The Information described in this section must be submitted in its entirety. If the required Information is not submitted, the bidder will lose the score for the specific evaluation criteria taking into consideration that this information is not rectifiable.**
- **If necessary, CABEL can request additional information or/and clarifications regarding the submitted offers.**

## **2.6 Compliance Documentation**

2.6.1. The compliance documents to be sent in this section shall include the following information:

- a. Copy of the company's deed, articles of incorporation or constitutive act, duly registered in the Commercial Registry or its equivalent, in which the stakeholder composition of the company can be found. Power of Attorney or Certification Copy issued by the Secretary of the Council in which the appointment of the legal representative of the company can be found.
- b. TAX ID Copy (RUC, RTN, NIT or its equivalent in the country of origin).
- c. At least one original bank reference, no older than 30 days after it has been issued.
- d. Affidavit for the Prevention of Money Laundering and Financing of Terrorism, (Annex 3) completed and signed by the legal representative.
- e. Copy of Legal Representative's passport or identification document.

2.6.2. The Bank reserves the right to request additional information or updated documents as it deems appropriate.

## **2.7 Economic Bid Contents**

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2.7.1. The financial bid shall contain the following documents placed in the following order:

- a. Properly stamped and signed economic bid template (Annex 4).
- b. Detailed document of the stamped and signed economic bid, in which the detail of fees and related expenses required to provide the services must be included.

2.7.2. The economic bid shall be subject to the following guidelines:

- a. The economic bid must include the direct and indirect costs related to the quoted service and clearly indicate the currency in which it is expressed.
- b. If the payment is made in United States dollars, the official exchange rate in effect at the date of the transaction will be used.

2.7.3. The economic bid must be submitted tax-free. CABEI will provide the taxes waiver document to the awarded bidder.

## **2.8 Bid Language**

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All documentation required to participate in this tender shall be submitted in English.

## **2.9 Bid Submission Procedure**

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Bids must be uploaded electronically in CABEI's Institutional Procurement Portal, which is available at [Portal de Proveedores](#) and all documentation shall be upload in the Public Tender **No. 015/2022 "Leveraging Technologies to Support the Government of Costa Rica with the Development of a Climate-Smart Greenhouse and Commercialization Strategy"** following the instructions below:

- a. Proposals must be uploaded separately, as indicated in the "Crear Respuesta" tab on the website.
- b. Once the documents have been uploaded to the Portal in full, hit the Send ("Enviar" as it appears on the website) button.
- c. The offers must only be submitted through CABEI's Institutional Procurement Portal, **do not send a copy to an email address.**

## **2.10 Deadline for Submission of Bids**

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- 2.10.1. The deadline for receiving bids is **April 26<sup>th</sup>, 2022.**
- 2.10.2. The bids submitted after this date shall be deemed extemporaneous and will not be taken into consideration.
- 2.10.3. Once the bid has been submitted, it cannot be withdrawn, replaced nor modified.

## **2.11 Inquiries, Deadlines and Coordination**

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- 2.11.1. If there are doubts or questions regarding the Terms of Reference or the bidding process, they shall be addressed through CABEI's Institutional Procurement Portal "Public Tender **No. 015/2022 "Leveraging Technologies to Support the Government of Costa Rica with the Development of a Climate-Smart Greenhouse and Commercialization Strategy"** in the tab denominated "Gestionar Preguntas del Negocio".
- 2.11.2. Questions submitted regarding the Terms of Reference will be accepted no later than **April 19<sup>th</sup>, 2022.**
- 2.11.3. All questions will be answered to all Bidders in order to maintain equality in the information provided, these will be uploaded to CABEI's Institutional Procurement Portal.
- 2.11.4. If necessary, requests to extend the deadline for submitting bids must be made no later than **April 20<sup>th</sup>, 2022,** through CABEI's Institutional Procurement Portal or by sending the request to [adqinstitucionales@bcie.org](mailto:adqinstitucionales@bcie.org) CABEI shall submit the deadline extension request for authorization.



## **2.12 Expression of Interest**

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Bidders who wish to participate in the Tender have to send an email to [adqinstitucionales@bcie.org](mailto:adqinstitucionales@bcie.org) Expressing their interest in order to be granted access to the tender's documents.

## **2.13 Validity of bids**

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2.13.1 The bids must have a validity period of at least ninety (90) calendar days, starting on their presentation deadline.

# **3. GENERAL NORMS**

## **3.1 Performance Standards**

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- 3.1.1. The Consulting Firm is committed to providing its professional services and execute the tasks indicated in the Contractual Documents, certifying that it meets the highest standards of integrity and professional competence, taking into consideration the nature and purpose of the Bank as an international organization of public law and guaranteeing that it will carry out the services indicated in the Contract to be signed in a manner consistent with the aforementioned.
- 3.1.2. The Bank at all times has the right to verify the quality of the work carried out by the Consulting Firm and to request the modifications and revisions that it deems pertinent within the approach contained in these Terms of Reference.

## **3.2 Bank Rights**

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- 3.2.1. If none of the proposals received is considered to fully satisfy the requirements included in these Terms of Reference, CABEI reserves the right to declare the process void. Likewise, CABEI reserves the right to reject any proposal, annul or declare the process unsuccessful, decide to extend it, cancel it or partially or totally postpone it, decide to grant it totally or partially to one or more suppliers, as well as determine whether it is convenient to its Corporate interests, without incurring in any liability to the Consulting Firm.
- 3.2.2. CABEI will make public the awarded bid for the services or provision of goods on its website, as well as the amount and date of the award in accordance with the provisions of the current Information Security Policy.
- 3.2.3. CABEI reserves the right to supervise the activities carried out by the Consulting Firm and determine whether said activities contravene the provisions related to information security; the Bank may take the actions it deems necessary to safeguard its information, reputation and image.

### **3.3 Reasons for Disqualification of Bids**

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- 3.3.1 Lack of a presentation letter signed by the legal representative of the company in the format provided by CABEI (Annex 1).**
- 3.3.2 The bids may be disqualified at any time during the process if a breach of the terms of reference occurs or is verified regarding the veracity of the information provided or the adulteration or falsification of the documentation submitted.
- 3.3.3 If the bids are incomplete or any of the requirements established in the terms of reference are omitted or not complied with, that are classified by the Bank as not rectifiable.
- 3.3.4 If the proposals are submitted somewhere different than established in the terms of reference and after the determined date and time.
- 3.3.5 If the documentation is presented with erasures or unjustified amendments.
- 3.3.6 It will be disqualified if the Economic bid is submitted in the same file as the technical bid or include any economic information in the Technical Bid.**
- 3.3.7 Send a copy of the proposal to any of CABEI's email addresses.
- 3.3.8 If the technical offer, once evaluated by CABEI, does not meet the minimum score established.

### **3.4 Prohibitions**

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To guarantee transparency in its procurement processes, the following persons may not participate, directly or indirectly, in the supply of goods and/or, services for CABEI.

- 3.4.1 Active officials or employees, ex-officials or ex-employees and retirees of CABEI for a period of two (2) years from their separation, in addition to spouses or housemates, nor relatives by blood or affinity up to the second degree, inclusive, of officials or active CABEI employees.
- 3.4.2 Juridical persons involving anyone indicated in the previous paragraph, considered individually or jointly, be holders of more than twenty-five percent (25%) of the share capital or hold a position of management or representation, for major purchases amounting ten thousand dollars (US\$10,000), currency of the United States of America, or its equivalent in any other currency.

### **3.5 Protests or Appeals regarding the Public Tender**

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Any bidder who has participated in this tender and has a complaint regarding its outcome can access the Reporting Channel available on the CABEI's website to issue such complaint. [www.bcie.org](http://www.bcie.org)

### **3.6 Confidentiality Clause**

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- 3.6.1 The Consulting Firm and, where appropriate, the personnel in charge of offering the services described in this document, must exercise the greatest secrecy and confidentiality in relation to conversations, data, documents and general information of the Bank that by any means comes to be of their knowledge, and in general, of any prior event or element, whether material or conceptual.
- 3.6.2 Any serious breach of the foregoing, defined as serious and which negatively affects the Bank's official relations with national authorities at any level, or which results in public or commercial dissemination that in any way damages the confidentiality of the Bank's information, may give rise to terminate the contract; the latter will be done by written communication to the Consulting Firm denouncing such events.

### **3.7 Acceptance of the Code of Ethics**

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The bidder declares, that it is aware of the principles, norms and corporate ethical values as well as individual values that prevail at CABEI within the framework of the Code of Ethics, which is attached to these Terms of Reference, and that in case of being selected, it must follow observance and compliance without any restrictions; any breach of said norm will give the Bank the right to terminate the procurement and/or contracting in advance without any responsibility on its part and without prejudice to the pertinent criminal and civil actions.

### **3.8 Annexes**

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- a. Annex 1 - Presentation letter.
  - b. Annex 2 - Payment Instructions Template.
  - c. Annex 3 - ML-TF Affidavit Form.
  - d. Annex 4 - Economic offer Template.
  - e. Annex 5 - CABEI Policies (Code of Ethics, Integrity Provisions, CABEI Information Security Policy, Money Laundering Prevention Policy).
  - f. Annex 6 - CABEI Contract Template.
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