**TERMS OF REFERENCE**

**AND TECHNICAL SPECIFICATIONS**

1. **General Informations**

| **Service description** | Provision of specialized services for the technical and operational management of the AMABIO 002/2026 and AMABIO 003/2026 Calls for Proposals. |
| --- | --- |
| **Beneficiary** | Expertise France (EF) |
| **Country** | Brazil |
| **Estimated total number of months** | 15 months |

1. **Context and Rationale**

The AMABIO Program – Sustainable and Inclusive Financing of the Amazon Bioeconomy is funded by the Agence Française de Développement (AFD) and implemented by Expertise France, in partnership with Brazilian public financial institutions. Its objective is to promote the Amazon bioeconomy as a strategy for sustainable development, income generation, productive inclusion, and biodiversity conservation. The initiative focuses on strengthening institutional and operational mechanisms that enable local initiatives to access financial support instruments adapted to the territorial realities of the Amazon.

In 2025, the AMABIO Program, in partnership with Banco da Amazônia, launched the AMABIO 001/2025[[1]](#footnote-0) Call for Proposals. In view of the planned launch of two new calls for project support in 2026 and 2027, it is necessary to contract specialized services for the integrated management of the digital platform and the selection processes of the AMABIO Calls for Proposals. This contracting aims to ensure efficiency, transparency, and technical coherence in the conduct of the selection cycles, through the integration of digital technology, document management, and coordination of the technical evaluation of proposals, in accordance with international cooperation best practices and the institutional requirements of Expertise France and its partners.

1. **Scope of the Contract**

This Terms of Reference aims to contract specialized services for the technical and operational management of the AMABIO 002/2026 and AMABIO 003/2027 Calls for Proposals, including the conduct of the selection processes and the management of the digital platform for proposal submission and evaluation.

1. **Activities to Be Performed**

### a. Coordination

### Technical and institutional management of the contracted services, ensuring continuous alignment with Expertise France and Banco da Amazônia, as well as integration and coherence across the planning, operational, and closing stages of the selection processes under the AMABIO Calls for Proposals. Activities include:

### Planning, organizing, and monitoring the execution of the activities provided for in the contract;

### Ensuring alignment between the rules of the calls, selection criteria, operational workflows, and the functionalities of the digital platform;

### Providing technical support to Selection Committee meetings, including preparation of information and systematization of decisions and follow-up actions;

### Monitoring deadlines, deliverables, and operational risks throughout the call cycles;

### Producing technical records, minutes, and monitoring reports;

### Systematizing lessons learned and preparing periodic reports and a final summary report.

### b. Calls for Proposals

### Design and technical drafting of the calls for proposals, from the initial diagnosis and benchmarking phase through final drafting and institutional validation, ensuring alignment with the objectives of the AMABIO Program, the territorial realities of the Amazon, and the target audiences. Activities include:

### Conducting benchmarking of relevant national calls and public tenders (bioeconomy, sociobiodiversity, innovation, inclusive finance);

### Analyzing previous experiences of the AMABIO Program and related initiatives, identifying good practices, risks, and opportunities for improvement;

### Supporting the definition of the strategic orientation of the calls, including objectives, funding lines, prioritization criteria, and geographic scope;

### Conducting technical consultations and qualified listening sessions with target audiences (civil society organizations, cooperatives, associations, enterprises, and other relevant stakeholders);

### Drafting and revising the call texts, ensuring clarity, technical coherence, accessible language, and alignment with the Program’s strategic objectives;

### Defining and structuring eligibility and selection criteria, including documentary requirements and evaluation parameters;

### Preparing eligibility matrices, checklists, and screening and admissibility protocols;

### Ensuring compatibility between the content of the calls and the functionalities of the digital platform;

### Supporting the institutional validation process of the calls with the Agence Française de Développement, Expertise France, and Banco da Amazônia.

### c. Digital Platform for Proposal Submission

### Customization, operation, and maintenance of a digital platform for the submission, management, and evaluation of proposals submitted to the AMABIO Program Calls for Proposals, ensuring operational efficiency, information security, accessibility, and an appropriate user experience for diverse audiences and territories with varying levels of connectivity. Activities include:

### Technical aspects

### Contracting and/or customizing a stable and responsive digital platform for proposal submission, compatible with different devices and browsers, including complete workflows for submission, validation, draft saving, and final submission;

### Structuring intelligent forms with mandatory fields, automatic format and size validations, guidance messages, and contextual alerts;

### Configuring document uploads by category, with version control and configurable limits (by file type/size/quantity), and automatic mechanisms to identify duplications, inconsistencies, and non-compliance (e.g., CPF/CNPJ, mandatory documents, call rules);

### Providing an administrative dashboard with advanced filters, operational dashboards, and real-time reports;

### Creating a dedicated area for reviewers, including permission management, proposal assignment, and recording of evaluations;

### Automatically logging all actions performed on the platform, indicating who performed the action, what was done, and when, to ensure control and transparency;

### Enabling secure export of data and reports in XLS or CSV formats and, when necessary, automatic integration with other systems to allow secure data exchange without manual processes;

### Conducting functional, performance, and security tests, as well as platform validation with the Program coordination team.

### Design, usability, and accessibility aspects

### Developing/providing a clear, intuitive, and user-oriented interface with simple and accessible language;

### Ensuring responsive design suitable for mobile devices;

### Applying user experience best practices, especially for users with low digital literacy;

### Adapting the platform to digital accessibility criteria;

### Including user guidance resources such as completion tips, integrated FAQs, and clear error messages;

### Developing support materials for platform use, such as manuals and tutorials (digital format).

### Information security and data protection

### Ensuring full compliance with the Brazilian General Data Protection Law (LGPD);

### Implementing secure authentication and access profile management;

### Ensuring encryption of data in transit and at rest;

### Performing automatic and periodic backups, with defined data retention and recovery policies;

### Defining and implementing security incident response procedures.

### Operation and support

### Operating the platform during proposal submission periods;

### Providing continuous technical support to users (applicants, evaluators, and management team);

### Monitoring platform performance, stability, and availability;

### Implementing adjustments and incremental improvements based on lessons learned and operational demands.

### d. Proposal Selection

### Technical and operational management of the proposal selection process, ensuring compliance with call rules, qualified technical evaluation, standardized procedures, transparency, and traceability, from the screening phase through final consolidation of results, under the institutional governance of Expertise France and Banco da Amazônia. Activities include:

### Documentary screening and admissibility

### Conducting documentary screening of proposals submitted via the digital platform;

### Verifying compliance with formal requirements of the call, including applicant profile, mandatory documentation, and eligibility criteria;

### Applying standardized admissibility checklists and protocols;

### Recording admissibility and non-admissibility decisions, ensuring traceability and audit trails;

### Consolidating quantitative and analytical data from the screening phase.

### Organization and coordination of technical evaluation

### Planning and organizing the technical evaluation stage of admissible proposals;

### Coordinating the work of independent reviewers, including proposal assignment and deadline monitoring;

### Ensuring uniform application of the evaluation matrix and technical criteria defined in the call;

### Standardizing evaluation tools, opinions, and technical justifications;

### Implementing mechanisms to control and record conflicts of interest among evaluators.

### Consolidation of results

### Consolidating scores, averages, and rankings of evaluated proposals;

### Verifying consistency of results and identifying any discrepancies;

### Preparing technical consolidation reports to support Selection Committee deliberations;

### Ensuring the integrity and auditability of information produced throughout the evaluation process.

### Support to deliberation and communication of results

### Providing technical support to Selection Committee meetings, including presentation of consolidated results;

### Technically supporting the formalization of Committee decisions;

### Supporting communication of results to selected and non-selected applicants, in accordance with institutional guidelines;

### Verifying and organizing final documentation of selected proposals, ensuring compliance for subsequent contracting stages (not included in this scope).

### Closure of the selection process

### Preparing the final report of the selection process for each call, including quantitative and qualitative analyses, key findings, risks, and recommendations;

### Consolidating records, databases, and audit trails;

### Systematizing lessons learned to inform improvements in future cycles.

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1. **Deliverables, Timeline, and Payment**

The provision of services covers two complete call cycles: AMABIO 002/2026 Call for Proposals and AMABIO 003/2027 Call for Proposals.

Each cycle will result in specific deliverables, with delivery, validation, and payment carried out independently, as described below:

1. **Deliverables and Timeline with Disbursement**

| **Nº** | **Product** | **Description** | **Deadline** | **% of the property value** |
| --- | --- | --- | --- | --- |
| **Product 1** | **Work Plan** | *A consolidated document containing the overall service delivery plan, work methodology, detailed schedule, team organization, definition of operational flows, and risk matrix.* | Up to 14 days after signing the contract. | 30% |
| **Product 2** | **Byproduct 2.1 - AMABIO 002/2026 Call for proposals structured and validated** | *Drafting the call for proposals based on benchmarking, consultations with target audiences, definition of eligibility and selection criteria, evaluation matrices and operational protocols, with institutional validation.* | Up to 60 days after signing the contract. | 20% |
| **Byproduct 2.2 - Operational Digital Platform for the AMABIO 002/2026 Call for proposals** | *A customized, approved, and operated digital platform for submitting, screening, and evaluating proposals for the AMABIO 002/2026 Call for Proposals, including support materials, information security requirements, and technical support during the submission and evaluation period.* | Up to 80 days after contract signing (approval); operation during the bidding cycle. |
| **Product 3** | **Byproduct 3.1 - Report with analysis of proposals received** | *Technical report consolidating and analyzing the submitted proposals, including quantitative and qualitative data, profile of the initiatives, and technical observations relevant to the selection process.* | According to the selection process schedule | 15% |
|  | **Byproduct 3.2 - Final Report of the Selection Process – AMABIO Call for proposals 002/2026** | *A consolidated technical report of the selection process, covering document screening, technical evaluation, consolidation of results, support for the Selection Committee, and systematization of lessons learned.* | At the end of the selection cycle for the AMABIO Call for proposals 002/2026 |
| **Product 4** | **Byproduct 4.1 - AMABIO Call for proposals 003/2027 structured and validated** | *Preparation and institutional validation of the call for proposals, considering methodological adjustments and improvements resulting from lessons learned in the previous cycle.* | According to the agreed schedule, expected for the second half of 2026. | 20% |
| **Byproduct 4.2 - Operational Digital Platform for the AMABIO Call for proposals 003/2027** | *Configuration, adjustments, and operation of the digital platform for the AMABIO 003/2027 Call for proposals incorporating incremental improvements and technical adjustments where applicable.* | As per the agreed schedule of the AMABIO Call for proposals 003/2027. |
| **Product 5** | **Byproduct 5.1 - Report with analysis of proposals received – AMABIO Call for proposals 003/2027** | *Technical report with analysis of the proposals submitted to the AMABIO Call for proposals 003/2027, including comparative data and performance indicators of the process.* | According to the selection process schedule. | 15% |
| **Byproduct 5.2 - Final Report of the Selection Process – AMABIO Call for proposals 003/2027** | *Consolidated technical report of the second selection process, including comparative analysis between cycles, evaluation of results, and recommendations for future public calls for proposals for the Program.* | At the end of the selection cycle for the AMABIO Call for proposals 003/2027. |

1. **Payment Terms**

* The supplier must issue an invoice detailing the services actually provided;
* Payment will be made by international bank transfer;
* The deadline for payment is up to 30 (thirty) calendar days, counted from the date of issuance of the invoice and formal validation of the products by Expertise France.

1. **Profile of the desired company**

The company to be contracted must demonstrate experience and technical capacity to execute, in an integrated manner, the services that are the subject of this Terms of Reference, ensuring technical quality, transparency, traceability of processes, and the production of consistent information and reports.

Note: The contractor may integrate third-party technologies and/or subcontract specialized experts, remaining fully responsible for the coordinated delivery and quality of the services provided to Expertise France.

The company must demonstrate:

* Experience in the development and operation of digital platforms for public calls for proposals;
* Proven experience in the technical and operational management of calls for proposals and selection processes;
* Knowledge of the socio-environmental context and the Amazonian bioeconomy;
* Availability of a multidisciplinary team with expertise in information technology, call for proposals management, and socio-environmental analysis;
* Capacity for documentation, process traceability, and preparation of technical reports.

1. **Submission of proposals and selection**

## Submission of Proposals

Interested companies must submit their proposals exclusively through the Place – Plateforme des Achats de l'État platform (<https://www.marches-publics.gouv.fr/entreprise>).

The proposal must include the following documents:

### Institutional portfolio, providing evidence of prior experience in delivering services compatible with the object of this Terms of Reference;

### Technical proposal, including the work methodology, operational approach, implementation schedule, and identification of the team involved, with the respective CVs;

### Financial proposal, detailing the costs associated with the delivery of each Output, in accordance with the guidelines established in this Terms of Reference.

## Selection Process

The selection of the company will be conducted through a technical and financial evaluation, in accordance with the rules and procedures of Expertise France, and will comprise the following stages:

* Verification of administrative compliance and fulfillment of the minimum eligibility requirements;
* Technical evaluation of the proposal, considering the proposed methodology, the company’s experience, and the qualifications of the team;
* Financial evaluation of the submitted proposal.

## Selection Criteria

Proposals will be assessed according to the following criteria and weightings:

* Company’s prior experience – 40%
* Technical and methodological proposal – 30%
* Financial proposal – 30%

The final ranking will be determined based on the total score obtained, in accordance with the criteria and weightings set out in this Terms of Reference.

1. **Coordination**

The contracted company shall appoint a Technical Lead to act as the focal point for communication, support, and monitoring of the contract implementation.

For the monitoring of activities by Expertise France, the institutional contact shall be Dominik Giusti, Bioeconomy and Innovation Coordinator of the AMABIO Programme, who will act as the project focal point and may be contacted at dominik.giusti@expertisefrance.fr.

Contract implementation shall be carried out in close collaboration with the technical teams of the AMABIO Programme, from the preparation phase through to the completion of activities, ensuring continuous alignment, systematic monitoring of deliverables, and adequate coordination to ensure the proper execution of the works.

## ANNEX

## Guidelines for the Desired Technical Scope of the Digital Platform

## This Annex describes the minimum functional and non-functional requirements expected for the digital platform for the submission, management, and evaluation of proposals under the AMABIO Call for Proposals.

## 1. Functionalities for Applicants

## Simplified registration, with secure authentication and access recovery.

## Clear and accessible guidance throughout the proposal submission process, including contextual tips, help messages, and a Frequently Asked Questions (FAQ) section.

## Application form structure aligned with the requirements of the Call for Proposals, including:

## *Mandatory fields for each required document;*

## *Automatic validation of file formats, extensions, and size limits.*

## File upload system organized by categories (e.g., PDF, JPG, ZIP), with clear identification of each document.

## Ability to save drafts and resume completion at a later stage.

## Mandatory final checklist highlighting missing documents or inconsistencies.

## Automatic blocking of submission in the event of an incomplete application.

## Automatic issuance of a submission receipt, sent by email, including protocol number, date, and time.

## Availability of a technical support channel for clarification of operational questions, when applicable.

## 2. Functionalities for Call Management

## Centralized administrative dashboard with access to all submitted applications.

## Advanced search and organization filters, including but not limited to:

## *State, municipality, or region;*

## *Thematic line or call category;*

## *Type of organization;*

## *CPF/CNPJ (individual or legal entity identification numbers);*

## *Keywords.*

## Automatic identification of:

## *Duplicate applications;*

## *Registration inconsistencies;*

## *Documentary non-compliance.*

## Possibility to export data in XLS and CSV formats.

## API integration, when applicable, with permission control.

## Activity log records, including user, date, time, and type of operation performed.

## Access profile management, with different permission levels (e.g., administrator, operator, support, read-only).

## Dashboards for real-time monitoring of:

## *Number of applications;*

## *Application status;*

## *Stages of the selection process.*

## Possibility of controlled reopening of applications for correction or documentary supplementation, subject to management authorization.

## Generation of real-time operational reports for monitoring and decision-making purposes.

## 3. Functionalities for Evaluators

## Individual dashboard displaying:

## *Assigned applications;*

## *Status of each evaluation.*

## Standardized system for:

## *Score attribution;*

## *Preparation of evaluation reports and justifications;*

## *Recording of comments.*

## Mandatory conflict of interest declaration mechanism, with formal record.

## Automatic recording of:

## *Completed evaluations;*

## *Date, time, and responsible evaluator.*

## Automatic consolidation of scores, averages, and rankings, in accordance with the criteria of the Call for Proposals.

## Possibility to export evaluation reports and scores in XLS and CSV formats for audit and archiving purposes.

## 4. Information Security and Data Protection (LGPD)

## Cloud hosting environment with internationally recognized information security certifications.

## Encryption of data in transit and at rest.

## Collection of explicit consent for the processing of personal data at the time of registration.

## Strict management of access permissions by user profile.

## Automatic daily backups with geographic redundancy.

## Definition and enforcement of data retention, anonymization, and secure disposal policies, in compliance with the Brazilian General Data Protection Law (LGPD).

## Existence of formal incident response procedures, including communication to institutional stakeholders when required.

## 5. Usability and Accessibility

## Responsive interface, compatible with computers, tablets, and mobile devices.

## Intuitive navigation, with clear and objective texts, avoiding unnecessary technical jargon.

## Compliance with accessibility criteria established by the Web Content Accessibility Guidelines (WCAG), at least at Level AA.

## Provision of user manuals and tutorials (PDF and video) for applicants, evaluators, and managers.

## Adoption of UX design best practices, considering usage in low-connectivity environments and varying levels of digital literacy.

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1. See at: <https://www.bancoamazonia.com.br/programa-amabio> [↑](#footnote-ref-0)