

TC Document

I. Basic Information

▪ Country/Region:	Regional
▪ TC Name:	LAC-China Capacity Building and Policy and Knowledge Partnerships
▪ TC Number:	RG-T2952
▪ Team Leader/Members:	Roberto Manrique (IFD/IFD), Team Leader; Yuan Li (IFD/IFD); Ana María Zárate (IFD/IFD); Taos Aliouat (LEG/SGO)
▪ Indicate if: Operational Support, Client Support, or Research & Dissemination	Research & Dissemination
▪ Date of TC Abstract authorization:	March 23, 2017
▪ Beneficiary:	IDB borrowing member countries
▪ Executing Agency and contact name:	IDB – Institutions for Development Department (IFD/IFD)
▪ Donors providing funding (amount and Fund's name):	Institutional Capacity Strengthening Thematic Fund (ICS)
▪ IDB Funding Requested:	US\$ 495,000
▪ Local counterpart funding, if any:	N/A
▪ Disbursement period (which includes Execution period):	48 months
▪ Required start date:	July 31, 2017
▪ Types of consultants (firm or individual consultants):	Individual consultants and firms
▪ Prepared by Unit:	IFD/IFD
▪ Unit of Disbursement Responsibility:	IFD/IFD
▪ TC Included in Country Strategy (y/n):	N/A
▪ TC included in CPD (y/n):	N/A
▪ Alignment to the Update to the Institutional Strategy 2010-2020:	Institutional capacity and rule of law

II. Objectives and Justification

- 2.1 This technical cooperation aims at further deepening the knowledge exchange and mutual understanding, as well as strengthening the partnership among countries in Latin America and the Caribbean (LAC) and China on institutional development. To that end, and building on the successful experience of the previous TC *RG-T2290 LAC-China Knowledge Exchange on Institutions for Sustainable and Long-Term Development*, this TC will finance policy and knowledge dialogues, as well as other knowledge management activities on a wide range of topics of common interest on institutional development. Through these activities, the two regions will deepen their institutional linkages and further develop their mutual understanding towards one that is mutually beneficial and constructive for sustainable and long-term growth. The TC also seeks to continue strengthening the existing partnership with Chinese institutions such as the Chinese Academy of Social Sciences (CASS) and to facilitate the formation of new partnerships through the activities of the TC.
- 2.2 During the past decade, the economic ties between China and countries of the LAC region have gotten significantly close. China has become one of the top trading partners of the region and also a major investor in the region through foreign direct

investment, merge and acquisition, and lending programs. According to data for 2016, trade volume between LAC and China was at \$216 billion, with LAC's export to China at \$103 billion, and LAC's import from China at \$113 billion. China was the top destination for South American exports, and the second destination for all of LAC exports, after the United States. In addition, Chinese companies made \$15.7 billion investment in LAC, and Chinese banks lent \$22.4 billion to LAC (Ray and Gallagher, 2017)¹.

- 2.3 As the economic relationship advances, the need to increase the mutual understanding beyond the trade and investment agenda started to emerge and is becoming increasingly relevant to build a healthy, sustainable and mutually beneficial relationship between China and countries in LAC in the long term.
- 2.4 For Latin America and the Caribbean, understanding the institutional framework of China's public sector is critical to comprehending its relationship with the region, thus better reacting to the continuous emerging influence of China in LAC countries. China's presence in the region is a result and a product of its domestic developments within the country. The role that the public sector plays in its economy, the relationship between public sector stakeholders in the central, municipal and local levels, as well as the changing policy priorities in China, among others, all affect China's interaction and behavior with countries in LAC. For example, as argued by Dr. Enrique Dussel Peters, "the omnipresence of China's public sector allows for short, medium, and long-term development strategies, and is one of the reasons why China can offer turnkey projects." (Dussel Peters, 2015)².
- 2.5 For China, it is equally critical to deepen its knowledge about LAC countries' institutional development and changes in policy priorities in order to effectively achieve mutually beneficial South-South cooperation with LAC. In fact, the Chinese government has recognized the importance of expanding the linkages with LAC beyond trade and business. After President Xi completed his official visits to Ecuador, Peru and Chile, China released its [second policy paper on Latin America and the Caribbean](#) in November 2016. The new policy paper focused on "bringing the comprehensive and cooperative partnership to new heights" under five salient features. Namely, sincerity and mutual trust in the political field, win-win cooperation on the economic front, mutual learning in culture, close coordination in international affairs, as well as mutual reinforcement between China's cooperation with the region as a whole and its bilateral relations with individual countries in the region. Specifically, it advocated for high-level exchanges of Chinese and LAC leaders, exchanges of experience on governance, inter-governmental dialogue and consultation mechanisms, exchanges between legislators, etc. (China Ministry of Foreign Affairs, 2016).

¹ For detailed report please refer to the [2017 China-Latin America Economic Bulletin](#) by Boston University.

² For detailed report please refer to [China's evolving role in Latin America: Can it be a win-win?](#) by the Atlantic Council.

- 2.6 In addition, both regions are at a stage in development where structural reform and new engines of growth are critically sought after to keep elevating people out of poverty, improving the quality of life and combating inequality. In the past, China's rapid economic growth fueled the commodity boost which largely benefited many LAC countries. As China's growth slows down, traditional pillars of the economy such as manufacturing, real estate, and industry are all showing decreased momentum. In this situation, the country is looking towards the "new norm", which implies the need to undergo a set of structural reforms that will emphasize not merely the volume of growth, but the shift to the quality of growth. At the same time in LAC, the world's lower demand for raw materials has adversely impacted many LAC countries through the commodity bust, reflecting the low resistance in LAC economies to external shocks. In this scenario, LAC countries are also seeking for structural upgrade in their economies to move up the value chain and increase productivity, which requires strong, capable, and smart institutions that can put the good policies in place and direct the countries to the right track.
- 2.7 In the shared quest for productivity growth and structural reform, both regions can learn from each other's past experiences, best practices, lessons learned as well as new policy initiatives to make use of the unique knowledge accumulated by one another for better growth. This is especially relevant for the pursuit of digital transformation of both regions: By reducing information costs, digital technologies greatly lower the cost of economic and social transactions for firms, individuals, and the public sector. They promote innovation when transaction costs fall to essentially zero. They boost efficiency as existing activities and services become cheaper, quicker, or more convenient. And they increase inclusion as people get access to services that previously were out of reach. Meanwhile, better and deeper understanding of each other will add value to the stronger partnerships between countries in LAC and China, thus facilitating the improvement in the South-South collaborations between the two regions.
- 2.8 The Bank has been playing a responsive and catalytic role in attending to the demand from LAC countries and China for a better, deeper, and diverse policy and knowledge exchanges. In 2015, IDB and the People's Bank of China (PBC) signed a new framework agreement that expands their ongoing partnership to promote cooperation between China and LAC with a long-term vision (5 years). This MoU promises to promote deeper and broader knowledge exchange between China and LAC in the priority areas included in the Bank's Update to the Institutional Strategy 2010-2020. More recently, the Bank and CASS signed a new MoU in recognition of the strong partnership established during the past years. The MoU supports the organization of policy dialogues and exchanges in areas of shared development challenges.
- 2.9 In June 2013, the Bank approved the project *LAC-China Knowledge Exchange Institutions Sustainable and Long-Term Development (RG-T2290)*, with the objective

of generating and facilitating the exchange of knowledge for sustainable long-term development through conferences, seminars as well as dissemination of policy experiences, research papers, and other relevant mechanisms between policymakers in both regions. This project supported the initiation and implementation of the flagship “LAC-China Policy and Knowledge Summit”, a series of annual high-level summits co-sponsored by the Bank and CASS that engages policy makers, scholars, private sector executives and international experts in open and profound dialogues about a chosen development challenge of mutual interest. Under the TC RG-T2290, three summits were delivered from 2014 to 2016, focusing on the topics of urban development and housing, public executive capacity building, productive development and innovation in three countries. Each summit gathered around 100 participants from the public sector, private sector and academia to share experiences and knowledge on the chosen topic.

- 2.10 The collaborations did not end at the summit meetings. After each summit, subsequent initiatives were established or are in the process of development to further advance the collaboration between the new partners formed during the summit. For instance, after the first summit, a cities network between China-LAC-Europe was formed for subnational public management; after the second summit, a public executive training program for LAC countries was being developed with the Chinese Executive Leadership Academy Pudong (CELAP). The activities generated because of the summit meetings allowed for the formation of work relations with new institutions in China beyond CASS, thus facilitating the development of new partnerships between IDB/LAC and China.
- 2.11 The summit was held in Lima, Peru (2014); the second in Beijing and Shanghai, China (2015); and the third in Medellin, Colombia (2016). The upcoming fourth summit, not envisaged in the original plan of the TC, is expected to take place in Shanghai and Hangzhou, China in September 2017. The topic for the fourth summit will be digital economy, with a special focus on digital finance. The technical teams from both organizers (IDB and CASS) are currently working on developing the agenda. The specific areas to be explored by the upcoming fourth summit in September will include digital finance services, fintech, e-commerce and social network and digital payments, big data, AI, blockchain, Internet of Things, etc. The primary objective of this summit is to learn from China’s successful experience in developing the digital finance ecosystem in various fronts, which includes panel discussions of policy makers and practitioners from China and LAC, and site visits to leading digital finance companies and industrial parks in China. Based on the content of the discussions during the summit, the team will be able to identify specific areas for further collaboration, which could take form of, and not limited to, joint research, training program, personnel exchange.
- 2.12 **Lessons Learned:** This project, a second phase of the project RG-T2290, seeks to build upon the successful experience, results and lessons learned of the first phase, including: 1) continued partnership with CASS, the most influential think tank in public

policy in China, is key to the quality of the knowledge exchanges between China and LAC countries; 2) timely communication with the partner and the participants will improve the efficiency of the preparatory work and enhance quality of the presentations; 3) having a public relations strategy early in the process will increase exposure and dissemination effect; 4) a close follow up post-summit will generate continued momentum and further expand the collaboration beyond the summit meetings to more concrete, in-depth activities between LAC countries and China.

- 2.13 **Alignment.** This TC is consistent with the Update to the Institutional Strategy 2010-2020 (AB-3008) and is aligned with the cross-cutting theme of institutional capacity and rule of law. Through the knowledge exchanges with China on topics of institutional development, policy makers in LAC will have an additional channel to learn about good practices and international policy experiences from China, as well as those from their peers in other LAC countries. It will also enhance the Bank's strategic relevance in the region as it will foster the Bank's catalytic role in bringing new knowledge and new international actors to the table of LAC's policy agenda, and fostering the establishment of additional bilateral or multilateral collaboration initiatives. The TC is consistent with the ICSF overall objective of strengthening institutions and greater participation and inclusion of civil society and the private sector in shaping government policies and programs in LAC and directly addresses the specific objective of bringing actors to the table, promoting strategic alliances, involving think-tanks and universities, increasing inter-institutional communication, and disseminating best practices through South-South dialogue in order to contribute and enable institutional reform. It also coincides with ICSF's strategic priority of supporting LAC-China initiatives.

III. Description of activities/components and budget

- 3.1 Key activities proposed for financing include the organization of the continuous events of the series "LAC-China Policy and Knowledge Summit", an annual high-level policy and knowledge exchanges between policy makers in LAC and China on selected topics of mutual interest jointly organized with the Chinese Academy of Social Sciences. The TC will also finance dissemination and post summit synthesis activities to capture the exchanges during the summit meetings for follow-up engagement between the two regions on the topics discussed.
- 3.2 **Component I. LAC-China Policy and Knowledge Summits.** This component aims at enhancing the LAC-China Policy and Knowledge Summit mechanism as one of the major channels for policy dialogues between key institutions in China and LAC. The summit is usually a 2- to 3-day event that brings about 100 policy makers, business representatives, and academia from China and LAC countries to have in-depth exchange on a topic that is jointly selected by the technical experts of the co-organizers (IDB and CASS). Participants engage in dialogues through panel discussions, presentations, networking sessions and field visits to relevant project sites to gain insights about each other's work on the selected topic. Summit will likely be hosted by China and LAC consecutively each year.

- 3.3 Topics of the summit will be selected by the technical experts from IDB and CASS jointly. The decision will be made based on the balance of the interest expressed by the organizers, the relevance of the topic for LAC countries and China at the time, and the ability to convene high-level participants in the areas.
- 3.4 Once topics are set and agreed by both organizers, participating institutions and individuals will be recommended by the technical teams on the basis of the geographic balance (to cover CID, CCB, CAN, CSC as much as possible), relevance to the subtopics they will speak on, level of expertise, seniority in the institutions they serve, as well as availability.
- 3.5 The TC will finance the initial assessment of the topics for the summits, preparation, and implementation of 3 annual summits. The activities of this component will include: (i) the analysis of the potential topics to be the focus of each summit and prepare topic assessment notes; (ii) the preparation for the summit key document (i.e. participation list, invitation letters, agenda, presentations guidelines, press releases, etc.); (iii) logistical organization and on-site support ³; (iv) coordination with Chinese counterparts and participants to ensure adequate preparation for the content and presentations of the event.
- 3.6 The expected outcome of this component is that policy makers from China and LAC will obtain deeper and better knowledge about the development of each other in the topics discussed, generate interest and engage bilaterally or multilaterally on institutional development initiatives, therefore making use of the knowledge learned in their own work.
- 3.7 **Component II. Dissemination and new collaboration development.** This component aims at disseminating the results of the summits and promoting continued activities in the areas that will be discussed during the summit. To achieve that, each summit will have a dissemination strategy in collaboration with the Bank's EXR department that will utilize media, social media, and other internal and external channels to promote the initiative and disseminate the results of the summits. Thorough, well-organized proceedings⁴ capturing the highlight of each summit will be produced so that a broader audience can have access to the knowledge shared during the events.
- 3.8 Some of the main activities of this component include: (i) media briefings to report the summit; (ii) the production the summit proceedings; (iii) the creation of summit webpage for access to information and dissemination, (iv) the organization of knowledge BBLs to bring highlight summit presentations and discussions to the broader audience at the Bank; (iv) follow up after the summit with the Chinese

³ The first TC (RG-T2290) was expected to cover 3 annual summits, a target which was surpassed. Part of the resources to be approved for the component 1 of this new TC will partially finance the organization of the 2017 summit, the fourth in the series.

⁴ Proceedings that have been produced from past summit meetings can be found at:

- [First summit](#)
- [Second summit](#)
- [Third summit](#)

counterpart and relevant technical teams to develop new activities to further expand the cooperation.

- 3.9 The expected outcome of this component is that the results of the summit meetings are exposed to a broader audience and are accessible to people interested in LAC-China relations, therefore adding new levels of discussion into the field of LAC-China relations. More importantly, it is expected that the Bank will convene further collaborations at greater depth between LAC countries and China, and that the exchanges during the summit meetings will become the starting point for deeper collaborations bilaterally or multilaterally among the IDB, institutions in LAC and in China.

Indicative Budget

Activity/Component	Description	Total Funding (US\$)
Component 1: LAC-China Policy and Knowledge Summits	Topic assessment reports	15,000
	Organization of the summits – including travel expenses of participants, logistics, and organization coordinator	410,000
Subtotal Component 1		425,000
Component 2: Dissemination and new collaboration development	Proceedings – including drafting, editing and design	46,000
	Knowledge BBLs	9,000
	News clippings	9,000
	Summit websites	6,000
Subtotal Component 2		70,000
TOTAL Budget		495,000

IV. Executing agency and execution structure

- 4.1 The executing agency for this TC will be IFD/IFD, which has been the direct collaborating partner with CASS for the project RG-T2290, and has built abundant operation experience and a robust partnership with CASS. In addition, IFD/IFD has also accumulated considerable experience in implementing the cooperation and convening different stakeholders in the Bank and in LAC countries to achieve fruitful exchanges. As a co-organizer of the policy summits, CASS will also be the key counterpart that will execute the project jointly with the IDB; CASS will contribute funding, personnel and time to the organization and dissemination of the summits. From past experience, when the summits are hosted in China, CASS assumes the required funding for the summit venue, on-site logistic support and necessary ground transportation arrangement to receive the visiting delegation.
- 4.2 **Procurement.** The Bank will contract individual consultants, consulting firms and non-consulting services in accordance with the applicable Bank's procurement policies and procedures.

V. Major issues

- 5.1 There is a risk that the summit attendance may be under represented and may not have enough high-level participants. This risk can be mitigated by early planning, frequent communication between stakeholders, and adequate engagement of the technical team so that the importance of the summit meetings will be smoothly conveyed to the relevant participant and that the participants have enough time to set aside the dates of the summit to avoid conflict of agenda.

- 5.2 There is also a risk that the collaboration may not continue beyond the summit meetings. This risk can be mitigated by informing the technical teams about the possibility of continuation in advance to raise awareness, engage key participants from LAC and China in informal dialogues during the summit to nurture further interest, and to connect the partner in China/CASS to jointly develop new proposals. In this way, the results of the summit would be sustained after the TC is completed.

VI. Exceptions to Bank policy

- 6.1 This TC has no exceptions to any Bank policy.

VII. Environmental and Social Strategy

- 7.1 There are no environmental or social risks associated with the activities outlined in this operation. In accordance with the results of the "Safeguards Policy Filter Report," it is proposed that the transaction be classified as category "C" ([Safeguard Policy Filter Report](#) and [Safeguard Screening Form](#)).

Required Annexes:

- Annex 1: Results Matrix
- Annex 2: Terms of Reference for activities/components to be procured
- Annex 3: Procurement Plan



Operation Number: **RG-T2952**
TCM Cycle: **TCM Period 2017**
Last Update: **7/10/2017**

Inter-American Development Bank - IDB

Result Matrix

Outcomes

Outcome:	1 Enhanced LAC-China institutional linkages and better mutual understanding between the two regions									
Indicators	Flags*	Unit or Measure	Baseline	Baseline Year	Means of verification	2018	2019	2020	EOP	
1.1 # of countries participated in each summit		# of countries	7.00	2016	Summit agenda	P	8.00	9.00	10.00	
						P(a)				
						A				
1.2 # of new institutions participated in each summit		# of institutions	10.00	2016	Summit agenda	P	12.00	13.00	14.00	
						P(a)				
						A				

RF - Contribution

Outputs: Annual Physical and Financial Progress

LAC-China Policy and Knowledge Summits						Physical Progress					Financial Progress							
Outputs	Fund Indicator	Unit of Measure	Baseline	Baseline Year	Means of Verification	2018	2019	2020	2021	EOP	2018	2019	2020	2021	EOP	Theme	Flags	
1.1 Diagnostics and assessments completed	Other(ICS) ICS	Diagnostics (#)	1	2017	Topic assessment notes prepared	P	1	1	1	3	P	5000	5000	5000	15000	Institutional Development		
						P(a)				0	P(a)				0			
						A					A							
1.2 Policy dialogue events organized	Other(ICS) ICS	Events (#)	1	2016	Summit events organized	P	1	1	1	3	P	140000	120000	150000	410000	Institutional Development		
						P(a)				0	P(a)				0			
						A					A							
2 Dissemination and new collaboration development						Physical Progress					Financial Progress							
Outputs	Fund Indicator	Unit of Measure	Baseline	Baseline Year	Means of Verification	2018	2019	2020	2021	EOP	2018	2019	2020	2021	EOP	Theme	Flags	
2.1 Summit web pages	Other(ICS)	# of web pages	1	2017	Webpages of the summit established	P	1	1	1	3	P	2000	2000	2000	6000	Institutional Development		
						P(a)				0	P(a)				0			
						A					A							
2.2 Discussion papers developed	Other(ICS) ICS	Papers (#)	1	2017	Proceedings of the summit produced and published	P		1	1	3	P		15000	15000	16000	46000	Institutional Development	
						P(a)				0	P(a)				0			
						A					A							
2.3 Brown bag events organized	Other(ICS) ICS	Brown bags (#)	0	2017	BBLs sharing the summit highlights organized	P		1	1	3	P		3000	3000	3000	9000	Institutional Development	
						P(a)				0	P(a)				0			
						A					A							
2.4 Relevant news clippings	Other(ICS)	# of media articles	5	2016	News articles reporting the summits published	P					P	3000	3000	3000	9000	Institutional Development		

Please note that the Overall Stage represents the stage of the operation at the time of this report’s publication, which might not necessarily match the stage of the operation during the PMR Cycle to which the report pertains.

					Summa published	P(a)	10	15	20		45	P(a)						0	Development	
						A						A								

Other Cost

Total Cost

 CRF Indicator

 Standard Output Indicator

	2018	2019	2020	2021	Total Cost
P	\$150,000.00	\$148,000.00	\$178,000.00	\$19,000.00	\$495,000.00
P(a)					
A					

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TERMS OF REFERENCE

LAC-China Capacity Building and Policy and Knowledge Partnerships (RG-T2952)

Support to LAC-China Policy and Knowledge Summits

I. Background

During the past decade, the economic ties between China and countries of the LAC region have gotten significantly close. China has become one of the top trading partners of the region and also a major investor in the region through foreign direct investment, merge and acquisition, and lending programs. According to data for 2016, trade volume between LAC and China was at \$216 billion, with LAC's export to China at \$103 billion, and LAC's import from China at \$113 billion. China was the top destination for South American exports, and the second destination for all of LAC exports, after the United States. In addition, Chinese companies made \$15.7 billion investment in LAC, and Chinese banks lent \$22.4 billion to LAC (Ray and Gallagher, 2017)¹.

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² For detailed report please refer to *China's evolving role in Latin America: Can it be a win-win?* by the Atlantic Council. <http://publications.atlanticcouncil.org/chinalatam//>

China's cooperation with the region as a whole and its bilateral relations with individual countries in the region. Specifically, it advocated for high-level exchanges of Chinese and LAC leaders, exchanges of experience on governance, inter-governmental dialogue and consultation mechanisms, exchanges between legislators, etc. (China Ministry of Foreign Affairs, 2016).

In addition, both regions are at the stage in development where structural reform and new engines for growth are critically sought after to keep elevating people out of poverty, improving the quality of life and combating inequality. In the past, China's rapid economic growth fueled the commodity boost which largely benefited many LAC countries. As China's growth slows down, traditional pillars of the economy such as manufacturing, real estate, and industry are all showing decreased momentum. In this situation, the country is looking towards the "new norm", which implies the need to undergo a set of structural reforms that will emphasize not merely the volume of growth, but the shift to the quality of growth. At the same time in LAC, the world's lower demand for raw materials has adversely impacted many LAC countries through the commodity bust, reflecting the low resistance in LAC economies to external shocks. In this scenario, LAC countries are also seeking for structural upgrade in their economies to move up the value chain and increase productivity, which requires strong, capable, and smart institutions that can put the good policies in place and direct the countries to the right track.

In the shared quest for productivity growth and structural reform, both regions can learn from each other's past experiences, best practices, lessons learned as well as new policy initiatives to make use of the unique knowledge accumulated by one another for better growth. Meanwhile, better and deeper understanding of each other will add value to the stronger partnerships between countries in LAC and China, thus facilitating the improvement in the South-South collaborations between the two regions.

This technical cooperation aims at further deepening the knowledge exchange and mutual understanding, as well as strengthening the partnership among countries in Latin America and the Caribbean (LAC) and China on institutional development. To that end, and building on the successful experience of the previous TC RG-T2290 LAC-China Knowledge Exchange on Institutions for Sustainable and Long-Term Development, this TC will finance policy and knowledge dialogues, as well as other knowledge management activities on a wide range of topics of common interest on institutional development. Through these activities, the two regions will deepen their institutional linkages and further develop their mutual understanding towards one that is mutually beneficial and constructive for sustainable and long-term growth. The TC also seeks to continue strengthening the existing partnership with Chinese institutions such as the Chinese Academy of Social Sciences (CASS) and to facilitate the formation of new partnerships through the activities of the TC.

These terms of reference describe the services needed to support the preparation and implementations of the programs under the LAC-China policy and knowledge summits.

II. Consultancy Objective

The objective of this consultancy is to contribute to the initial generation and facilitation of the policy and knowledge exchange activities on LAC-China capacity building and policy and knowledge partnerships.

III. Main Activities

The contractual will carry out, but not be limited to, the following activities:

- (i) Assessment of key lessons learned for the previous policy and knowledge exchange and any other conferences and seminars with IDB participation;
- (ii) Trend analysis of the most relevant and important policy issues in LAC-China in the next five years, with an emphasis on institutions;
- (iii) Support the planning and organization of the LAC-China policy and knowledge summits in close collaboration with the team in the Chinese Academy of Social Sciences, to ensure the participation of key stakeholders in LAC and in China;
- (iv) Provide contents to establish the summit webpages;
- (v) Support other exchange activities that may arise in the context of the technical cooperation;
- (vi) Provide technical assistance and operational and overall support for China-LAC exchanges;
- (vii) Perform other activities related to technical cooperation, as requested by the supervisor.

The contractual will also:

- (i) Provide analytic, research and logistical support in all activities related to the technical management of the LAC-China work program on institutions.
- (ii) Prepare draft documents for dissemination including concept notes for the policy exchanges, summary notes, web stories, blog posts, etc.
- (iii) Coordinate and provide operational and overall support to the preparation and implementation of the policy exchange and any other seminar and workshops with IDB participation.
- (iv) Prepare all other necessary documents as requested by the supervisor.

The contractual will carry out, as needed, other related activities as requested by the team leader.

IV. Qualifications

- Bachelor's degree (Master's preferable) in Economics, Political Science, Business, Public Administration or related fields. Minimum 2 years of relevant experience.
- Languages: Fluent in Chinese and English, Spanish preferred. Strong spoken and written communication skills including the ability to speak and write persuasively and present ideas clearly and concisely.
- Areas of Expertise: Research in the area of institutional development, with an emphasis on LAC-China relations. Experience on policy exchanges or similar conferences will be a plus.
- Good ability in facilitating workshops with government officials and other stakeholders.
- Strong research and analytic skills in areas of governance, public policy and economics.
- Excellent interpersonal and communication skills, self-motivated with a record of exercising initiative.
- Flexible approach and ability to work in multi-cultural, multi-national, multi-sector teams.
- Excellent computer skills in word processing, Excel, PowerPoint and others.
- Demonstrated ability to undertake a diversity of tasks within a rapidly changing and demanding environment on short deadlines.

V. Characteristics of the Consultancy

Consultancy Category & Modality: Temporary Term Contractual, Monthly

Place of work: Headquarters

Responsible person: Roberto Manrique, Senior Advisor, IFD/IFD robertoman@iadb.org

Payment and Conditions: Compensation will be determined in accordance with Bank's policies and procedures. The Bank, pursuant to applicable policies, may contribute toward travel and moving expenses. In addition, candidates must be citizens of an IDB member country.

Visa and Work Permit: The Bank, pursuant to applicable policies, may submit a visa request to the applicable immigration authorities; however, the granting of the visa is at the discretion of the immigration authorities. Notwithstanding, it is the responsibility of the candidate to obtain the necessary visa or work permits required by the authorities of the country(ies) in which the services will be rendered to the Bank. If a candidate cannot obtain a visa or work permit to render services to the Bank the contractual offer will be rescinded

Consanguinity: Pursuant to applicable Bank policy, candidates with relatives (including the fourth degree of consanguinity and the second degree of affinity, including spouse) working for the Bank as staff members or Complementary Workforce contractuels, will not be eligible to provide services for the Bank.

Diversity: The Bank is committed to diversity and inclusion and to providing equal opportunities to all candidates. We embrace diversity on the basis of gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, religion, and HIV/AIDs status. We encourage women, Afro-descendants and persons of indigenous origins to apply.

TERMS OF REFERENCE

LAC-China Capacity Building and Policy and Knowledge Partnerships (RG-T2952)

Dissemination Support for LAC-China Policy and Knowledge Exchanges and other LAC-China Initiatives

I. Background

During the past decade, the economic ties between China and countries of the LAC region have gotten significantly close. China has become one of the top trading partners of the region and also a major investor in the region through foreign direct investment, merge and acquisition, and lending programs. According to data for 2016, trade volume between LAC and China was at \$216 billion, with LAC's export to China at \$103 billion, and LAC's import from China at \$113 billion. China was the top destination for South American exports, and the second destination for all of LAC exports, after the United States. In addition, Chinese companies made \$15.7 billion investment in LAC, and Chinese banks lent \$22.4 billion to LAC (Ray and Gallagher, 2017)³.

As the economic relationship advances, the need to increase the mutual understanding beyond the trade and investment agenda started to emerge and is becoming increasingly relevant to build a healthy, sustainable and mutually beneficial relationship between China and countries in LAC in the long term.

For Latin America and the Caribbean, understanding the institutional framework of China's public sector is critical to comprehending its relationship with the region, thus better reacting to the continuous emerging influence of China in LAC countries. China's presence in the region is a result and a product of its domestic developments within the country. The role that the public sector plays in its economy, the relationship between public sector stakeholders in the central, municipal and local levels, as well as the changing policy priorities in China, among others, all affect China's interaction and behavior with countries in LAC. For example, as argued by Dr. Enrique Dussel Peters, "the omnipresence of China's public sector allows for short, medium, and long-term development strategies, and is one of the reasons why China can offer turnkey projects." (Dussel Peters, 2015)⁴.

For China, it is equally important to deepen its knowledge about LAC countries' institutional development and changes in policy priorities in order to effectively achieve mutually beneficial South-South cooperation with LAC. In fact, the Chinese government has recognized the importance of expanding the linkages with LAC. After President Xi completed his official visits to Ecuador, Peru and Chile, China released its second policy paper on Latin America and the Caribbean in November 2016. The new policy paper focused on "bringing the comprehensive and cooperative partnership to new heights" under five salient features. Namely, sincerity and mutual trust in the political field, win-win cooperation on the economic front, mutual learning in culture, close coordination in international affairs, as well as mutual reinforcement between

³ For detailed report please refer to the *2017 China-Latin America Economic Bulletin* by Boston University. <https://www.bu.edu/pardeeschool/research/gegi/publications/2017-china-latin-america-economic-bulletin/>

⁴ For detailed report please refer to *China's evolving role in Latin America: Can it be a win-win?* by the Atlantic Council. <http://publications.atlanticcouncil.org/chinalatam/>

China's cooperation with the region as a whole and its bilateral relations with individual countries in the region. Specifically, it advocated for high-level exchanges of Chinese and LAC leaders, exchanges of experience on governance, inter-governmental dialogue and consultation mechanisms, exchanges between legislators, etc. (China Ministry of Foreign Affairs, 2016).

In addition, both regions are at the stage in development where structural reform and new engines for growth are critically sought after to keep elevating people out of poverty, improving the quality of life and combating inequality. In the past, China's rapid economic growth fueled the commodity boost which largely benefited many LAC countries. As China's growth slows down, traditional pillars of the economy such as manufacturing, real estate, and industry are all showing decreased momentum. In this situation, the country is looking towards the "new norm", which implies the need to undergo a set of structural reforms that will emphasize not merely the volume of growth, but the shift to the quality of growth. At the same time in LAC, the world's lower demand for raw materials has adversely impacted many LAC countries through the commodity bust, reflecting the low resistance in LAC economies to external shocks. In this scenario, LAC countries are also seeking for structural upgrade in their economies to move up the value chain and increase productivity, which requires strong, capable, and smart institutions that can put the good policies in place and direct the countries to the right track.

In the shared quest for productivity growth and structural reform, both regions can learn from each other's past experiences, best practices, lessons learned as well as new policy initiatives to make use of the unique knowledge accumulated by one another for better growth. Meanwhile, better and deeper understanding of each other will add value to the stronger partnerships between countries in LAC and China, thus facilitating the improvement in the South-South collaborations between the two regions.

This technical cooperation aims at further deepening the knowledge exchange and mutual understanding, as well as strengthening the partnership among countries in Latin America and the Caribbean (LAC) and China on institutional development. To that end, and building on the successful experience of the previous TC RG-T2290 LAC-China Knowledge Exchange on Institutions for Sustainable and Long-Term Development, this TC will finance policy and knowledge dialogues, as well as other knowledge management activities on a wide range of topics of common interest on institutional development. Through these activities, the two regions will deepen their institutional linkages and further develop their mutual understanding towards one that is mutually beneficial and constructive for sustainable and long-term growth. The TC also seeks to continue strengthening the existing partnership with Chinese institutions such as the Chinese Academy of Social Sciences (CASS) and to facilitate the formation of new partnerships through the activities of the TC.

These terms of reference describe the services needed to support the communication and dissemination of the results of the LAC-China policy and knowledge summits.

II. Consultancy Objective

The objective of this consultancy is to support the development of a communication and dissemination strategy for the LAC-China Policy and Knowledge Summit, as well as produce dissemination materials.

III. Main Activities

The contractual will carry out, but not be limited to, the following activities:

- Develop a communication strategy including online and offline communication channels to promote the name of the LAC-China policy and knowledge summits, work with Bank's EXR department to deliver through IDB official social media account the necessary dissemination materials;
- Develop a concept paper for all the dissemination materials and activities that will help document key lessons learned and best practices from policy exchanges and generate content for subsequent policy exchanges;
- Coordinate with external media partners to release news clippings and other dissemination materials
- Prepare the proceedings after each summit to capture the highlights of the meetings;
- Produce and upload thought provoking and compelling content on the website;
- Engage in user research, determine audience needs, and act on audience feedback;
- Manage and coordinate content translation in English, Spanish, Portuguese and Chinese;
- Perform other activities related to technical cooperation, as requested by the supervisor.

IV. Qualifications

- Master's degree in Development, Publishing, Communications, or related fields, and proven training on research methods.
- Language skills: Fluent in English and Spanish. Portuguese and Chinese a plus.
- Areas of expertise: Strong spoken and written communication skills including the ability to speak and write persuasively and present ideas clearly and concisely. Significant experience in and/or a high-level knowledge and understanding of international development topics and issues.
- Thorough understanding of editorial practices, graphic design principles, and print and electronic production methods and procedures as well as technical knowledge in order to effectively troubleshoot issues that might arise with the task.
- Strong interpersonal skills, client orientation, and ability to work effectively with internal and external clients in a multi-cultural and matrix management environment as a team member as well as a team leader.
- Ability to work effectively under stress, prioritize and juggle multiple tasks within tight deadlines, and respond to changing demands.

V. Characteristics of the Consultancy

Consultancy Category & Modality: Temporary Term Contractual, Monthly

Place of work: Headquarters

Responsible person: Roberto Manrique, Senior Advisor, IFD/IFD robertoman@iadb.org

Payment and Conditions: Compensation will be determined in accordance with Bank's policies and procedures. The Bank, pursuant to applicable policies, may contribute toward travel and moving expenses. In addition, candidates must be citizens of an IDB member country.

Visa and Work Permit: The Bank, pursuant to applicable policies, may submit a visa request to the applicable immigration authorities; however, the granting of the visa is at the discretion of the immigration authorities. Notwithstanding, it is the responsibility of the candidate to obtain the necessary visa or work permits required by the authorities of the country(ies) in which the services will be rendered to the Bank. If a candidate cannot obtain a visa or work permit to render services to the Bank the contractual offer will be rescinded

Consanguinity: Pursuant to applicable Bank policy, candidates with relatives (including the fourth degree of consanguinity and the second degree of affinity, including spouse) working for the Bank as staff members or Complementary Workforce contractuels, will not be eligible to provide services for the Bank.

Diversity: The Bank is committed to diversity and inclusion and to providing equal opportunities to all candidates. We embrace diversity on the basis of gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, religion, and HIV/AIDs status. We encourage women, Afro-descendants and persons of indigenous origins to apply.

PROCUREMENT PLAN FOR NON-REIMBURSABLE TECHNICAL COOPERATIONS										
Country: RG					Executing agency: Bank			Public or private sector: (indicate which applies)		
Project number: RG-T2952					Title of Project: LAC-China Capacity Building and Policy and Knowledge Partnerships					
Period covered by the plan: 2017-2021										
Threshold for ex-post review of procurements:					Goods and services (in US\$):		Consulting services(in US\$):			
Item N°	Ref. AWP	Description (1)	Estimated contract cost (US\$)	Procurement Method (2)	Review of procurement (3)	Source of financing and percentage		Estimated date of the procurement notice or start of the contract	Technical review by the PTL (4)	Comments
						IDB/MIF %	Local/other %			
1		Component 1								
		<i>Non consulting services</i>								
1.1		Travel expenses for participants in the LAC-China Policy and Knowledge Summit (3 summits)	300,000	N/A	N/A	100		Q3 2017	N/A	This part includes cost such as flight ticket purchase, per diem and hotel expenses of the participants that will be covered by the IDB. The payment will be made through letters of agreement and Bank travel agency.
1.2		Conference organization cost - logistics	80,000	SSS	N/A	100		Q2 2018	N/A	This part includes cost related to the logistical organization of the summits, such as conference venues, coffee breaks, local transportation, graphic design, production of printed materials, etc. Event management agencies will be contracted to provide this type of services.
		<i>Individual consultants</i>								
1.3		Consultants to take charge of the organization of the events.	30,000	IICQ	N/A	100		Q3 2017	N/A	The consultants will take charge of the organization of the event, coordinate with participants, Chinese counterparts, and IDB specialists.
1.4		Consultants to produce the topic assessment reports	15,000	IICQ	N/A	100		Q3 2017	N/A	The consultants will provide topic assessment to provide the basic foundation for the summits.
2		Component 2								
		<i>Non consulting services</i>								
2.1		Logistics for BBLs	9,000	PC	N/A	100		Q2 2019	N/A	This part include logistical costs related to the organization of the BBLs.
2.2		Proof reading, translation and graphic design of the 3 summit proceedings	16,000	PC	N/A	100		Q1 2019	N/A	This part will be for editing and graphic design services for the proceedings
		<i>Individual consultants</i>								
2.3		Consultants to produce the 3 summit proceedings after each event	30,000	IICQ	N/A	100		Q4 2018	N/A	The consultants will put together the script of the presentations and organize the text nicely into summit proceedings
2.4		Consultants to produce and coordinate the production of other dissemination materials such as news clippings and websites	15,000	IICQ	N/A	100		Q3 2017	N/A	The consultant will produce the content of new clippings and provide content for building the websites of the summit events.
Total			495,000	Prepared by: IFD/IFD			Date: 7/10/17			
(1) Grouping together of similar procurement is recommended, such as computer hardware, publications, travel, etc. If there are a number of similar individual contracts to be executed at different times, they can be grouped together under a single heading, with an explanation in the comments column indicating the average individual amount and the period during which the contract would be executed. For example: an export promotion project that includes travel to participate in fairs would have an item called "airfare for fairs", an estimated total value of US\$5,000, and an explanation in the Comments column: "This is for approximately four different airfares to participate in fairs in the region in years X and X1".										
(2) Goods and works: CB: Competitive bidding; PC: Price comparison; DC: Direct contracting.										
(2) Consulting firms: CQS: Selection Based on the Consultants' Qualifications; QCBS: Quality and cost-based selection; LCS: Least Cost Selection; FBS: Selection under a Fixed Budget; SSS: Single Source Selection; QBS: Quality Based selection.										
(2) Individual consultants: IICQ: International Individual Consultant Selection Based on Qualifications; SSS: Single Source Selection.										
(2) Country system: include selection Method										
(3) Ex-ante/ex-post review: In general, depending on the institutional capacity and level of risk associated with the procurement, ex-post review is the standard modality. Ex-ante review can be specified for critical or complex process.										
(4) Technical review: The PTL will use this column to define those procurement he/she considers "critical" or "complex" that require ex ante review of the terms of reference, technical specifications, reports, outputs, or other items.										