**Annex II Technical Proposal**

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| **SECTION 1: GENERAL APPLICANT’S INFORMATION** | | | |
| 1. Applicant’s Legal Name (In case of consortium, Lead Applicant): | | | |
| 2. Type of Organization (e.g. commercial for-profit firm, educational, non-profit etc): | | | |
| 3. In case of Joint Venture (JV), legal name of each party: | | | |
| 4. Actual or intended Country/ies of Registration/Operation: | | | |
| 5. Year of Registration: | | | |
| 6. Countries of Operation | 7. No. of staff in each Country | | 8.Years of Operation in each Country |
| 9. Legal Address/es in Country/ies of Registration/Operation: | | | |
| Website URL | |  | |
| Social Media URL (Facebook) | |  | |
| LinkedIn | |  | |
| YouTube | |  | |
| Instagram | |  | |
| Other | |  | |
| 13. Applicant’s Authorized Representative Information  Name:  Address:  Telephone/Fax numbers:  Email Address: | | | |
| 15. Attached are copies of original documents of:  ☐ Audited financial statement for the past year duly certified by a public accountant  ☐Letter from the applicant organization’s executive director, CEO, or board, expressing its commitment to the execution and participation in this process.  ☐Complete CVs of all the team members involved in the assignment  ☐ Staff time allocation spreadsheet per activity | | | |
| **SECTION 2: SPECIFIC EXPERIENCE FOR THE ASSIGNMENT. In the case of consortia, please refer to the relevant partner’s experience for similar projects. You can include up to 5 most relevant projects in the past 3 years**   |  |  |  |  | | --- | --- | --- | --- | | Name of the project |  | | | | Grant/contract value (USD) |  | Website if applicable | | | | Target Country(ies) |  | Implementation Period |  | | |  | | | | | | Name of the Client/funder |  | | | | | References contact details | name, | position | phone number email | |  |  |  | |  | | | | | | Description of the approach/methodology |  | | | | | Key outputs/deliverables produced |  | | | | | Key Performance Indicators/ Targets |  | | | | |  | | | | | | Names of the staff that participated in the assignment |  |  |  | | | Knowledge product production and dissemination strategy of the assignment |  | | | | | | | |
| 2.1. Please describe your organization’s experience in producing similar projects | | | |
| 2.2. Describe your firm’s experience in developing Open Source Payments Platforms aligned with “Level One Framework” principles, including integration tools being deployed and used in other markets (max 1 page) | | | |
| 2.3. Describe your organization’s previous experience training and connecting financial service providers to an open source and national interoperable payments platform including countries and clients; and whether the deployment is production ready. Experience should be limited to direct organization experience, not including subcontractors or partners. (Preference is for any LDC country and/or South East Asian context). (max 1 page) | | | |
| 2.4. Demonstrate your understanding of Myanmar´s National Payment Strategy and articulate how this project will fit into that strategy. Share your firm’s experience working with regulators on real time payment systems  (max 1 page) | | | |
| 2.5 To what extent does the product or service address the SDGs/ Problem Statement/ market needs directly?  Describe your experience targeting low-income segments/ market segments with preference to Myanmar.  (max 1 page) | | | |
| 2.6 Is regulatory approval required to take the project forward? If Yes, please tell us more about the type of regulatory approval required and which regulatory authority is competent to issue the approval and if you have already received the approval or when do you expect to receive it? (max ½ page) | | | |
| 2.7 Share your organization’s understanding of the potential risks you may face in delivering on this assignment and the risk mitigation measures you will employ. (max ½ page) | | | |
| **SECTION 3: APPROACH AND IMPLEMENTATION PLAN (maximum 10 pages)** | | | |
| 3.1. Approach to the Results Required: Please provide a detailed description of the methodology for how the organisation(s)/firm(s) will achieve project outputs proposed in section 2.2 (see below) keeping in mind the appropriateness to local conditions and project environment.   |  |  |  |  | | --- | --- | --- | --- | | Indicator | Current Baseline  (September 2020) | Proposed  End of 1st phase  (6 months) | Proposed  End of the project  (18 months) | | Number of institutions that co-create the digital payment product document for digital loan repayments | 11 | 15 | 20 | | Number of MojaLoop Lab Environments created | 1 | 1 | 1 | | Number of DFSPs[[1]](#footnote-1) that receive a technical assessment | 7 | 20 |  | | Number of institutions that participate in Mojaloop Partner Program training | 7 | 20 |  | | Number of people who participate in Mojaloop Partner Program training | 15 | 60 |  | | Number of DFSPs that complete integration with MojaLoop Lab Environment | 5 | 7 |  | | Number of training sessions in-person or webinar with financial services providers, vendors and integrators | 2 | 6 |  | | Number of case studies for the industry and the regulator | 1 | 3 |  | | Number of institutions that co-create the product document for digital social payments | 0 | 15 |  | | Number of institutions that co-create the product document for digital loan disbursements | 0 | 14 |  | | Number of use cases identified and developed with the DFSPs | 1 | 3 |  | | Number of mobile money access solutions (e.g. MFSPs and/or bank wallets) integrated in open payment system | 0 | 4 |  | | Number of sustainability plans developed | 0 | 0 | 1 | | Number of designs for transformation of industry databases into Mojaloop oracles | 0 | 2 |  | | Number of industry existing databases converted into Mojaloop Oracles | 0 | 0 | 2 | | Number of live demonstrations and testing completed | 0 | 3 |  |   3.2. Approach to Partnership with UNCDF and field-based Partners:The applicant must provide a detailed description of how to plan, implement and deliver the overall project in partnership with UNCDF and field-based partners. The applicant should describe how they will take the lead role in ensuring that there is sufficient and ongoing communication, both virtually and in person. This section should highlight the support necessary from UNCDF and local partners.  3.3. Technical Quality Assurance Review Mechanisms: The methodology shall also include details of the applicant’s internal technical and quality assurance review mechanisms.  3.4 Implementation Timelines: The Applicant shall submit a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing, specifying timelines, person responsible, and time devoted to each activity.  3.5. Sub-Grantees: Explain whether any work would be delegated, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-grantees. Especially in the case of consortiums, special attention should be given to providing a clear picture of the role of each entity and how everyone will function as a team.  3.6. Reporting and Monitoring: Please provide a brief description of the mechanisms proposed for this project for reporting to (and ongoing communication with) UNCDF and partners, including a reporting schedule (also reflected in Gantt chart) and indicators list in line with section 2.4 of the RFA.  3.9 Other: Any other comments or information regarding the project approach and methodology that will be adopted. | | | |
| **SECTION 4: PERSONNEL** | | | |
| 4.1 Management Structure: Describe the overall management approach toward planning and implementing this activity. Include an organization chart for the management of the project describing the relationship of key positions and designations along with information on the roles and structure of any sub-grantees, contractors, or other critical relationships.  4.2 Qualifications of Key Personnel. Provide the CVs for key personnel (Team Leader, Managerial and general staff) that will be provided to support the implementation of this project. CVs should demonstrate qualifications in areas relevant to the results to be produced. In **addition to the CVs**, please submit a summary for each person in the following format.   |  |  |  |  | | --- | --- | --- | --- | | **Name:** | |  | | | **Position for this Grant:** | |  | | | **Nationality:** | |  | | | **Contact information:** | |  | | | **Countries of Work Experience:** | |  | | | **Language Skills:** | |  | | | **Educational and other Qualifications:** | |  | | | **Summary of Experience:** *Highlight experience in the region and on similar projects.* | | | | | **Relevant Experience (From most recent):** | | | | | **Period: From – To** | **Name of activity/ Project/ funding organisation, if applicable:** | | **Job Title and Activities undertaken/Description of actual role performed:** | | *e.g. June 2004-January 2005* |  | |  | | *Etc.* |  | |  | | *Etc.* |  | |  | | **Reference no.1 (minimum of 3):** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Reference no.2** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Reference no.3** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Declaration:**  I confirm my intention to serve in the stated position and present availability to serve for the term of the proposed grant agreement. I also understand that any wilful misstatement described above may lead to my disqualification, before or during my engagement.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature of the Nominated Team Leader/Member Date Signed | | | | |  | | | | | | | |
| **SECTION 5: BUDGET PROPOSAL**  **Budget proposals should not exceed US$ 1,420,000 that UNCDF has available to fund the achievement of these results**  **In the case of proposals by a consortium, please clearly indicate amounts for each partner. Applicants can use as a format the template provided in Annex 3 enclosed to this RFA.** | | | |
| Please provide budget allocation as outlined in Annex 3 or similar format  **Please provide budget allocation per result/milestone to be achieved in the following format (please refer to sections 2.1 and 2.3 of the RFA):**   1. Milestones  |  |  |  | | --- | --- | --- | | Indicative Payment date | Amount to be paid | Results/Milestone to be achieved as disbursement condition | |  |  |  | |  |  |  | | Total | USD… |  | | | | |

1. DFSPs here is a broad term that includes MFIs, banks, mobile money operators, etcetera. It includes any type of regulated financial institution capable of providing digital financial services in any of its varieties (saving, lending, payments, insurance). [↑](#footnote-ref-1)