

TERMS OF REFERENCE

Reference	PN/FJI/068/20
Location	Home-based and possible travel (subject to advisories) to 11 Pacific countries- Fiji, PNG, Kiribati, Samoa, Solomon Islands, Timor-Leste, Tonga, Tuvalu and Vanuatu and two countries in the Northern Pacific to be decided from Palau, FSM, RMI
Application deadline	10 th August 2020
Type of Contract	Individual Contractor
Post Level	International Consultant
Consultancy Title	Consultant - Regional Goals on Inclusive Digital Economies and Climate Disaster Risk Financing
Languages required:	English
Duration of Initial Contract:	Maximum of 60 days between August to November 2020

BACKGROUND

Overview

PFIP is a Pacific-wide programme that has helped over two million Pacific islanders gain access to financial services and financial education. It achieves these results by funding innovation with financial services and delivery channels, supports policy and regulatory initiatives, and the empowerment of consumers.

It is jointly administered by the UN Capital Development Fund (UNCDF) and the United Nations Development Programme (UNDP) and receives funding from the Australian Government, the European Union and the New Zealand Government. PFIP operates from the UNDP Pacific Office in Suva, Fiji and has offices in Papua New Guinea, Samoa, Solomon Islands and Vanuatu. More information on PFIP can be accessed through www.pfip.org.

Money Pacific Goals 2020

The 2020 Money Pacific Goals (MPG 2020) were adopted by the Pacific Island Countries (PICs) through the Forum Economic Ministers & officials (FEMM) and the regional Central Bank Governors in 2009. These goals reflected the high priority placed by leaders across the region on building financial literacy skills and support development efforts regarding financial inclusion.

These goals are:

In each Pacific Island nation by 2020, through the combined actions of public and private sectors:

1. All school children to receive financial education through core curricula.
2. All adults to have access to financial education.
3. Simple and transparent consumer protection to be in place.
4. To halve the number of households without access to basic financial services.

PFIP played a key role in the development and endorsement of the MPG 2020 and was tasked to collate and submit an annual progress report of the signatory countries to the FEMM meeting. Accordingly, PFIP has been submitting the annual report to the FEMM ever since with inputs being provided by the respective Central Banks.

The MPG 2020 is a regional policy commitment of the PICs and has prioritized financial inclusion and financial education for national development planning. The MPG 2020 is due to end this year and while there has been significant progress by all reporting countries towards achieving the goals, there are still gaps, but more importantly newer challenges have emerged. The impact of the Covid-19 pandemic, the effects of climate change and the growing use of digital technologies have presented both new challenges as well as opportunities. Therefore, it is a good moment to review and define a fresh set of goals for the endorsement of all PICs, aligned with the regional priorities.

DUTIES AND RESPONSIBILITIES

The PFIP aims to work closely with the regional Central Banks and relevant Government departments to develop a new set of regional priorities and goals to succeed the MPG 2020 through a consultative process in line with the changing trends and challenges of the region.

The consultant shall conduct a literature review of academic papers, government publications, and 'grey literature', including publications from research institutes, UN agencies, NGOs, national NSOs, etc. that have been written on the topics of financial inclusion, financial education/financial literacy, and more importantly on other emerging regional priorities, such as inclusive digital economies, climate change and disaster risk finance. This review will provide the input for key informant interviews in each of the countries of focus to obtain feedback on framing the set of regional priorities and goals to be placed for consideration to the FEMM.

This assignment shall be conducted in three phases:

1. The first phase shall cover the literature review and the development of a key informant interview questionnaire.

7 working days are allocated for this phase. Should it be decided that the questionnaire is to be administered remotely, PFIP will support this, whilst the compilation of results will be carried out by the consultant.

2. The second phase will involve interviews and consultations with key informants in each of the country of focus. These include Fiji, PNG, Kiribati, Samoa, Solomon Islands, Tuvalu, Timor-Leste, Tonga and Vanuatu besides two countries from the Northern Pacific to be chosen

A maximum of 3 working days per country are allocated. Actual travel and in-country time will depend on flight schedules and availability of stakeholders to be interviewed. With the current restrictions on international travel due to COVID-19, together with national health and quarantine measures, the contractor will have the option of consultations to be carried out via online conferencing.

3. Completion of final report with recommendations, based on draft reports from the first two phases

7 working days are allocated for this phase.

The assignment will start with a kick-off call, where PFIP will explain the expectations for the assignment as well as clarify any questions that the consultant might have. As part of the literature review, the researcher is asked to first submit a list of sources (including the abstract) of the literature they will review as well as an outline of the structure of their report after the first 3 working days. The contractor shall review this list of sources and outline and will discuss their review during a second conference call.

Once the literature review is completed, the key informant interview guide will be developed by the consultant and approved by the contractor.

Outputs and deliverables

The main deliverables from the scope of work will be as follows:

1. Inception report with the summary of findings from the literature review and a draft interview questionnaire.
2. Three draft reports on the stakeholder interviews and the results thereof:
 - a. for the first batch of 4 countries
 - b. for the second batch of 4 countries
 - c. for the last 3 countries and for all the 11 selected countries
3. A final report with a new set of regional priorities and goals to replace the MPG 2020 based on the literature review and the stakeholder interviews in each of the eleven selected countries to be submitted to the Pacific Island Forum Secretariat (PIFS) for consideration by the FEMM

Institutional Arrangement

The consultant will work closely with the UNCDF-PFIP country teams and will report to the PFIP Programme Manager. Progress reporting will be done on a weekly basis by email and through calls.

Duration of the Work

The assignment is to be conducted between August to November 2020 with a maximum of 60 consultancy days.

Duty Station

Home-based and possible travel (subject to advisories) to 11 Pacific countries- Fiji, PNG, Kiribati, Samoa, Solomon Islands, Timor-Leste, Tonga, Tuvalu and Vanuatu and two countries in the Northern Pacific to be decided from Palau, FSM, RMI

COMPETENCIES

- Proven experience in conducting literature reviews, stakeholder consultations and research
- Proven experience in developing policy frameworks, national and regional policies and submissions to governments with evidence of a minimum three examples
- At least 5 years of experience with specific focus on policy development on at least three or more of the following topics: digital finance, financial inclusion, digital economies, market development, climate change and disaster risk finance
- Strong analytical and communication skills besides good report writing skills.
- Must be able to engage with senior level policy makers and senior Government / Central Bank officials
- Past experience working in Pacific region.

REQUIRED SKILLS AND EXPERIENCE

Educational Qualifications:

- Bachelor's degree in Humanities, Social Science, Development Economics or related discipline. Master's qualification desired, but not required

Experience

- Proven research expertise with at least 3 years' experience in literature reviews related to the topics mentioned in the scope of work
- Proven experience in developing policy briefs, national, regional or global policy commitments (minimum three projects)
- Five years' experience in financial inclusion and/or financial literacy projects with specific focus on policy and/or regulatory areas.
- Three years' experience (or two projects) of working with senior policy makers, Government officials and regulators, preferably in the Pacific

Language requirements

- Fluency of English language is required

Price Proposal and Schedule of Payments

Consultant shall quote an all-inclusive Daily Fee for the contract period. The term "all-inclusive" implies that all costs (professional fees, communications, consumables, etc.) that could be incurred by the IC in completing the assignment are already factored into the daily fee submitted in the proposal.

If applicable, travel or daily allowance cost (if any work is to be done outside the IC's duty station) should be identified separately. Payments shall be done on a monthly basis based on actual days worked, upon verification of completion of deliverables and approval by the IC's supervisor of a Time Sheet indicating the days worked in the period. The primary contacts for reporting for this TOR shall be the PFIP Programme Manager.

In general, UNDP shall not accept travel costs exceeding those of an economy class ticket. Should the IC wish to travel on a higher class he/she should do so using their own resources. In the event of unforeseeable travel not anticipated in this TOR, payment of travel costs, DSA and terminal expenses should be agreed upon, between the Programme Manager and the Individual Consultant, prior to travel and will be arranged by PFIP.

Evaluation Method and Criteria

Bids will be evaluated on cumulative analysis. The award of the contract shall be made to the bidder whose offer has been evaluated and determined as a) responsive/compliant/acceptable; and b) having received the highest score out of set of weighted technical criteria (70%) and financial criteria (30%).

Technical Criteria for Evaluation (Maximum 70 points)

Technical Proposal (70%)

- Bachelor's degree in Humanities, Social Science, Development Economics or related discipline. Master's qualification desired, but not required – Max 5 points
- At least 5 years of experience in developing policy frameworks, national and regional policies and submissions to governments with evidence of a minimum three examples – Max 25 points
- At least 5 years of experience on at least three or more of the following topics: digital finance, financial inclusion, digital economies, market development, climate change and/or disaster risk finance – Max 25 points
- Proposed methodology/approach reflecting a clear pathway towards building political consensus for new regional policy goals – Max 10 points
- Past experience working in Pacific region – Max 5 points

Financial Proposal (30%)

To be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP

Only bidder obtaining a minimum of 49 points (70% of the total technical points) would be considered for the Financial Evaluation.

Documentation required

Interested individual consultants must submit the following documents/information to demonstrate their qualifications. Please group them into **one (1) single PDF document** as the application only allows to upload maximum one document:

- **Letter of Confirmation of Interest and Availability** using the template provided in Annex II.
- **Personal CV or P11**, indicating all past experience from similar projects, as well as the contact details (email and telephone number) of the Candidate and at least three (3) professional references.
- **Technical proposal**, including a) a brief description of why the individual considers him/herself as the most suitable for the assignment; and b) a methodology, on how they will approach and complete the assignment.
- **Financial proposal**, as per template provided in Annex II. (Note: National consultants must quote prices in United States Dollars (USD)).

Incomplete, joint proposals and proposals sent to the wrong mailing address will not be accepted. Individuals interested in this consultancy should apply and will be reviewed based on their own individual capacity. The successful individual may sign an Individual Contract with UNDP or request his/her employer to sign a Reimbursable Loan Agreement (RLA) on their behalf by indicating this in the Offerors letter to Confirming Interest and Availability using Annex II.

Annexes

- Annex I - Individual IC General Terms and Conditions
- Annex II – Offeror's Letter to UNDP Confirming Interest and Availability for the Individual IC, including Financial Proposal Template

Proposal Submission

- All applications must be clearly marked with the title of the consultancy- Consultant - Regional Goals on Inclusive Digital Economies and Climate Disaster risk Financing with reference (PN/FJI/068/20) and submitted via **UN Job shop** by **10th August 2020**.
- **Note: UNDP Jobs only supports single document upload hence ensure that the proposal consolidated and submitted as one single document.**
- For further information concerning this Terms of Reference, please contact UNDP Pacific Office by email: procurement.fj@undp.org.

Women applicants are encouraged to apply