**TERMS OF REFERENCE**

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| **Project title** | “Rolling out an Integrated Approach to the SDG Financing inMongolia”  |
| **Location** | Ulaanbaatar, Mongolia |
| **Post title** | Private Finance Expert  |
| **Type of contract** | Individual Contractor (IC) |
| **Languages required:** | English and Mongolian |
| **Duration of Initial Contract** | 10 months (200 working days) |

**BACKGROUND**

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| The Sustainable Development Goals (SDGs) are the most ambitious collective development endeavour attempted, requiring the world to equally ensure social governance, economic inclusion, and environmental protection by 2030. There is a growing recognition of the need for more integrated approaches to financing, where public and private sources of finance contribute to sustainable development according to their specific characteristics. This is a central feature of the Addis Ababa Action Agenda (AAAA), which calls for the SDGs to be implemented through nationally owned sustainable development strategies, supported by integrated national financing frameworks[[1]](#footnote-2). ***Integrated national financing frameworks[[2]](#footnote-3)*** (INFF) bring together financing and related policies most relevant to addressing a country’s financing challenges. The UN Joint Programme "Rolling out an Integrated Approach to the SDG Financing in Mongolia" aims to contribute to improved alignment of financial resources with the national development policies, formulation of an integrated financing strategy, and building capacity of key stakeholders for implementation of SDG financing strategies.The process of mapping the current situation of integrated financing landscape and identifying priority financing strategies is underway. A Technical Working Group has been established to develop and operationalize INFF, including representatives of multiple stakeholders. The objective of this assignment is to assist in mobilizing private sector resources towards the implementation of the SDGs and national development goals, by completing and operationalizing the INFF and integrated financing strategy by focusing on areas related to private finance, their alignment with SDGs and the country’s development priorities, and by supporting relevant initiatives towards strengthening private finance for sustainable development.  |

**DUTIES AND RESPONSIBILITIES**

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| **Scope of Work**1. Take lead in completion of the private finance related parts of the INFF and the financing strategy;
	* Review the international practices, latest developments and experiences of other countries in boosting private finance for sustainable development;
	* Review the findings of the INFF assessment and diagnostics report, draft INFF roadmap, and draft financing strategy, provide quality assurance and ensure that the national priory needs and international good practices are well reflected[[3]](#footnote-4), and specific milestones are agreed, and the principle of ‘leaving no one behind’ and gender dimensions are incorporated;
	* Lead and organise consultation among key stakeholders, including banking, investment, stock market, sustainable finance entities, as well as key industry and regulatory players and ensure their participation in the development of the financing strategy;
	* Prepare case studies to demonstrate and contextualize innovative and good practices of sustainable finance and PPP of other countries;
	* Identify critical areas, key bottlenecks and opportunities for speedy operationalization of the financing strategy, especially those related to private finance through intensive consultation with industry stakeholders;
	* Provide support to the INFF Technical working group activities;
	* Provide support to the multi-stakeholder consultations sessions, workshops and conferences to facilitate dialogue among stakeholders and agree on the priorities, actions and next steps;
2. Develop policy recommendations in relation to mobilizing private sector resources to sustainable development and encouraging sustainable investment;
	* Develop a set of policy recommendations based on the review of international practices and stakeholder consultations and develop an action plan/roadmap for sustainable private finance;
	* Organise the multi-stakeholder consultations sessions, workshops and conferences to facilitate dialogue among stakeholders and agree on the priorities, actions and next steps;
	* Identify, design, and follow up on implementation of 2-3 priority actions by engaging relevant stakeholders and building partnerships with relevant bodies;
	* Develop the draft regulations, guidance, tools ensuring participation and building buy-in of the stakeholders, where relevant;
3. Build awareness and conduct capacity building in relation to private sector resource mobilization;
	* Prepare brief advocacy materials on the role of domestic and international private finance for sustainable development and new sources of financing;
	* Develop knowledge products and conduct trainings and workshops to contribute to strengthening the private finance ecosystem in the country;
4. Provide support to the implementation of the Joint Programme
	* Follow up on the implementation of the private sector related activities referred to in the Joint Programme document (e.g, green taxonomy, impact measurement);
	* Support the implementation of the other activities referred to in the Joint Programme document;
	* Provide support to the project monitoring and reporting;
	* Collaborate with projects and teams working in similar fields to maximize synergy, contribute to team efforts for innovative solutions to development issues;
	* Plan and take actions to enhance sustainability of actions initiated under the project;

**Deliverables:**1. Brief progress report on actions taken under Task 1 and intermediate results;
2. Review of international practices, latest developments and experiences of other countries in the field of sustainable finance and financing for development;
3. Policy recommendations and action plan for sustainable private finance;
4. List of briefs, advocacy materials, knowledge products and case studies prepared;
5. List of conferences, workshops and trainings conducted or facilitated;
6. Progress report on activities and initiatives for speedy operationalization of the financing strategy;
7. Progress report on activities and initiatives for the successful implementation of the Joint Programme;

All deliverables shall be submitted in Mongolian. However, selective materials will need to be submitted in English, upon request of the Project Coordinator or international consultants. **Payment schedule**Payments shall be made monthly, based on the monthly progress reports linked to the project annual workplan timelines and the list of deliverables; **Institutional Arrangement**The private finance expert shall report to the Project Coordinator and work closely with the finance and policy focal points of government Ministries, other stakeholders, and consultants working on similar thematic assignments. **Duration of the Work**10 calendar months (200 working days)  |

**REQUIRED SKILLS AND EXPERIENCE**

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| **Educational Qualifications:*** Advanced university degree (Master's degree or higher) in Economics, Finance, Banking, Public Finance and other closely related fields;

**Experience*** Minimum 8 years of work experience in the areas of economic analysis, public and private financing, investment and financial data analysis, financial regulation, public-private partnership, or other closely related fields;
* At least 3 similar assignments demonstrating analytic and research skills and expertise (references or samples to be submitted with the application);
* Extensive experience working with the private sector and facilitating multi-stakeholder dialogue;
* Good understanding of sustainable finance and innovative financing would be an asset;

**Language requirements*** Fluency of English and Mongolian languages is required;

**Price Proposal and Schedule of Payments**Consultant must send a financial proposal based on lump sum amount.The total amount quoted shall be all-inclusive and include all costs components required to perform the deliverables identified in the TOR, including professional fee, travel costs, and any other applicable cost to be incurred by the IC in completing the assignment. The contract price will fixed output-based price regardless of extension of the herein specified duration. In the event of unforeseeable travel not anticipated in this TOR, payment of travel costs including tickets, lodging and terminal expenses should be agreed upon, between the respective business unit and the Individual Consultant, prior to travel and will be reimbursed.**Evaluation Method and Criteria**Individual consultants will be evaluated based on the following methodology of **Cumulative analysis.** The award of the contract shall be made to the individual consultant 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%). Financial score shall be computed as a ratio of the proposal being evaluated and the lowest priced proposal received by UNDP for the assignment. **Technical Criteria for Evaluation (Maximum 70 points)** See attached table – Technical evaluation scoring guide.Only candidates obtaining a minimum of 70% of the total technical points would be considered for the Financial Evaluation.Shortlisted candidates shall be called for an interview which will be used to confirm and/or adjust the technical scores awarded based on documentation submitted.**Documentation required**Interested individual consultants must submit the following documents/information to demonstrate their qualifications:* **Letter of Confirmation of Interest and Availability** using the template provided in Annex II.
* **Personal CV or** [**P11**](https://info.undp.org/global/documents/cap/P11%20modified%20for%20SCs%20and%20ICs.doc), indicating all past experience from similar projects, as well as the contact details (email and telephone number) of the Candidate and at least two (2) 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 III.

Incomplete proposals may not be considered. Only the successful candidate will be notified of contract award.**Annexes*** Annex I – Technical evaluation scoring guide
* Annex II - [Individual IC General Terms and Conditions](http://www.undp.org/content/dam/undp/documents/procurement/documents/IC%20-%20General%20Conditions.pdf)
* Annex III – [Offeror’s Letter to UNDP Confirming Interest and Availability for the Individual IC, including Financial Proposal Template](https://info.undp.org/global/documents/cap/Template%20for%20Confirmation%20of%20Interest%20and%20Submission%20of%20Financial%20Proposal.docx)
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| **Criteria** | **Weight** | **Max. point** |
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| **Technical criteria 1: Education** |  | **20** |
| Advanced university degree (Master's degree or higher) in Economics, Finance, Banking, Public Finance and other closely related fields; |  | *[20]* |
| **Technical criteria 2: Professional experience** |  | **50** |
| Minimum 8 years of work experience in the areas of economic analysis, public and private financing, investment and financial data analysis, financial regulation, public-private partnership, or other closely related fields;Extensive experience working with the private sector and facilitating multi-stakeholder dialogue ;  |  | *[30]* |
| At least 3 assignments demonstrating analytic and research skills and expertise (references or samples to be submitted with the application) |  | *[10]* |
| Good understanding of sustainable finance and innovative financing would be an asset;  |  | *[10]* |
| **Technical criteria 3 - Proposed methodology and approach** |  | **15** |
|  |  | *[15]* |
| **Technical criteria 4 – Language skills** |  | **15** |
|  |  | *[15]* |
| **Technical Score** | **70%** | **100** |

**Annex 1. Technical evaluation scoring guide**

1. UNDP, Integrated Financing Solutions: How countries around the world are innovating to finance the SDGs, <https://v2.sdgfin.org/knowledge-hub/publications/> [↑](#footnote-ref-2)
2. [https://developmentfinance.un.org/sites/developmentfinance.un.org/files/INFF%20Guidance\_ Inception%20Phase%20Module\_Working%20Draft\_20-January-2020.pdf](https://developmentfinance.un.org/sites/developmentfinance.un.org/files/INFF%20Guidance_%20Inception%20Phase%20Module_Working%20Draft_20-January-2020.pdf) [↑](#footnote-ref-3)
3. For instance,

<https://www.ifc.org/wps/wcm/connect/publications_ext_content/ifc_external_publication_site/publications_listing_page/cpsd-indonesia>;

<https://oecd-development-matters.org/2020/02/21/new-approaches-to-scaling-private-sector-funding-for-sustainable-development/> [↑](#footnote-ref-4)