



RFP-2025-27
ANNEXURE 1 - TECHNICAL PROPOSAL

CONSULTANT/FIRM NAME: _____

SECTION A: TECHNICAL EVALUATION

1. Understanding of the Assignment:

- A. Please describe your technical understanding of this assignment.** *Clearly outline your grasp of the project's objectives, scope, and expected outcomes. (Maximum 150 words)*

2. Relevant Experience & Qualifications:

- A. What makes you/your institution best qualified to undertake this assignment?** *Highlight your expertise in generate robust empirical evidence on the complementarity between monetary stability, financial stability and financial inclusion, including specific experience. Provide evidence where possible. (Maximum 300 words)*



- B. Provide three (3) examples of past assignments where you developed or contributed to monetary stability, financial stability and financial inclusion. Include details such as the institution you worked with, the scope of work, and key results achieved. (Maximum 300 words)**

- C. List three (3) references (clients, institutions, or partners) for whom you have undertaken similar assignments. Provide their names, institutions, email addresses, and phone numbers.**

3. Technical Approach & Execution Plan

- A. Please describe your approach and execution plan for this consulting engagement. (Maximum 300 words)**



- B. **Outline your methodology for stakeholder engagement.** *Given the critical role of stakeholder consultation in this assignment, describe how you will engage central banks, financial regulators, and private sector stakeholders to **ensure** inclusivity, collaboration, and practical policy development. (Maximum 200 words)*
- C. **What challenges do you anticipate in executing this project, and how will you mitigate them?** *Identify key risks and present a risk mitigation strategy. (Maximum 150 words)*
- D. **How will you monitor and evaluate the progress and effectiveness of your implementation of this assignment?** (Maximum 150 words)



4. Experience in Key Thematic Areas

Please indicate your level of experience in the following areas by selecting the appropriate option:

No.	Area of Expertise	Extensive Experience	Moderate Experience	Limited Experience
1.	Financial Regulation & Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Financial Inclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Consumer Protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Financial Stability policymaking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Monetary Policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Quantitative research and data analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Monitoring and Evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	Financial Inclusion of Most Vulnerable Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.	Gender Financial Inclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	Other related topics/experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Team Composition & Roles (For Firms Only)

- A. **Provide details of the key personnel who will be involved in this consultancy.** *Include their roles, qualifications, and experience in similar assignments. Attach detailed CVs. (Maximum 300 words)*



6. Supporting Documentation (Mandatory Submissions)

The following documents must be submitted as part of your application. *[Disclaimer: AFI has the right to disqualify applicant who do not comply to the submission requirements]*

- | | |
|---|-----------------------------------|
| (i) Updated CVs of proposed consultant(s) demonstrating evidence of the required skills and experience listed in the TOR. | <input type="checkbox"/> Attached |
| (ii) Previous work samples of similar work done (link or attachment). | <input type="checkbox"/> Attached |
| (iii) Work Plan. | <input type="checkbox"/> Attached |
| (iv) Conflict of Interest Disclosure Form | <input type="checkbox"/> Attached |
| (v) Statement of Integrity [when applicable] | <input type="checkbox"/> Attached |
| (vi) Business Registration. [FOR SOLE PROPRIETOR, COMPANY, FIRM or ORGANIZATION] | <input type="checkbox"/> Attached |
| (vii) Joint Venture Agreement. | <input type="checkbox"/> Attached |
| (viii) Disclosure of employment. [FOR INDIVIDUAL] | <input type="checkbox"/> Attached |

7. Additional Information

- A. Are you currently engaged in full-time or part-time employment with any institution, and/or government official? *(For individual applicants only)*
- B. Do you have any existing engagements with AFI or ongoing consultancy work that may pose a conflict of interest? *(Yes/No - If Yes, please provide details)*



- C. Any additional information that would help in evaluating your qualifications and suitability for this project? *(Maximum 200 words)*