

REQUEST FOR EXPRESSION OF INTEREST

8 August 2024

REQUEST FOR EXPRESSION OF INTEREST (EOI) – EOI SOM/005/2024 **FOR FINANCIAL INCLUSION STUDY**

Closing on 18th August 2024 at 23:59 hrs (East Africa Time)

A. Background

1. The United Nations World Food Programme hereinafter referred to as the “WFP”, with its Headquarters located in Via C.G. Viola, 68/70, 00148 Rome, Italy is the leading humanitarian organization saving lives and changing lives, delivering food assistance in emergencies and working with communities to improve nutrition and build resilience by assisting almost 100 million people in around 83 countries each year. About 17,000 people work for the organization, most of them in remote areas, directly serving the hungry poor.
2. The **WFP Programme Unit** seeks a reputable individual/company to conduct a **full financial inclusion study in Somalia**.
3. The primary objective of this consultancy is to comprehensively assess the current state of financial inclusion in Somalia, identify barriers, and recommend strategies for enhancing access to financial services. More specifically, the objectives of the study will include:
 - Description of the **levels of financial inclusion** among different demographic groups in Somalia (i.e., levels of access and usage of financial products and services both formal and informal).
 - Description of the **landscape of access and usage** of financial services such as savings, insurance, credit, remittances, and payments. (i.e., the type of products and services used by financially included individuals).
 - Identification of **key actors, players, influencers, stakeholders**, and their specific roles in the financial sector in Somalia.
 - Identification of the **drivers of** and **barriers to** financial access (including socio-economic, regulatory, and infrastructural challenges) and the underlying factors contributing to financial exclusion.
 - Identification and analysis of **financial service providers' challenges** in supplying affordable financial services and products to vulnerable groups.
 - Assess **trends/changes/interventions** over time (from 2014) and **collect reliable and updated data** about savings, borrowing, mobile money and remittances among other financial services.
 - Examine the reality of **saving and borrowing behaviour** for individuals and households in conflict-affected communities in Somalia.
 - Understand the **status of numeracy, digital and financial literacy** in Somalia, especially regarding basic financial concepts, budgeting, savings, and responsible borrowing.
 - Analyse the **regulatory framework** in Somalia concerning the financial sector.
 - Evaluate the **impact** of financial inclusion on the livelihoods of vulnerable populations.
 - Provide recommendations on the **demand, supply, and advocacy-focused interventions** that WFP can implement to increase digital and financial inclusion for vulnerable populations. \
4. Scope of Work: The consultant/company will be responsible for:
 - a. Reviewing existing literature, reports, and data on financial inclusion and identifying knowledge gaps and key themes relevant to the study.
 - b. Undertaking financial sector mapping documenting the number of formal financial service providers in Somalia.
 - c. Identifying and engaging key stakeholders, including government agencies, financial institutions, NGOs, and community leaders and undertaking meetings to gather insights and information.

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- d. Developing a detailed survey design and methodology, and utilizing appropriate research methods, such as quantitative surveys, qualitative interviews, or mixed methods.
- e. Carrying out data collection through field surveys, interviews, and focus group discussions among others.
- f. Analyzing data and synthesizing findings by each region in Somalia to generate insights into financial inclusion.
- g. Undertaking a validation workshop to present the findings to multiple stakeholders including government, and the private sector.
- h. Formulating actionable recommendations based on the study's findings.
- i. Developing a comprehensive report outlining the current status, challenges, opportunities, and recommendations for enhancing for enhancing financial inclusion in Somalia.

5. Expected Deliverables:

- a. An inception report detailing the study design, methodology, work plan, and data collection tools within two weeks of contract commencement.
 - b. Draft report for review and feedback by WFP within eight weeks of contract commencement.
 - c. Evidence of KII, FGD in the form of photos, and attendance sheets
 - d. Graphical presentation of access strands, total product uptake, the landscape of access and financial literacy.
 - e. Final report incorporating feedback and recommendations, submitted within one week of receiving feedback on the draft report. (The final report must include stakeholder mapping, quantitative data analysis matrix, and a presentation of key findings as annexes).
6. Duration: The consultancy is expected to commence on [mid-August] and be completed within twelve weeks from the commencement date.
7. WFP invites eligible suppliers to express their interest in providing the requested services.

B. The purpose of this EOI

8. The purpose of this request for EOI is to identify suppliers with verified technical and financial capacity to provide the services. Eligible suppliers will be invited to participate in the bidding process for the proposed tender.
9. Eligibility to participate in the proposed tender will be determined on the basis of submission of the requested documents.
10. After the deadline for submission of responses has passed, WFP will evaluate responses received and will notify eligible participants of the outcome of the evaluation.

C. How to prepare and submit your Expression of Interest

11. In order to participate in the pre-qualification exercise, companies are required to provide the following:
The filled in EOI Response Form, which includes:
 - Table 1. WFP Requirements
 - Table 2. Supplier Information;
 - Table 3. Supplier Financial Status;
 - Table 4. Supplier Relevant Experience;
 - Signatory by the authorized company representative and company stamp.

f.



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12. All supporting documentation listed above shall be prepared in accordance with the instructions provided and sent somalia.procurement@wfp.org, copying abdi.jelleaden@wfp.org, and meity.kadarwati@wfp.org.
 13. WFP will not consider incomplete or unsigned submissions. All responses and supporting documentation received will be treated as strictly confidential and will not be made available to the public.
 14. This request for EOI does not constitute a solicitation. WFP reserves the right to change or cancel this procurement process or any of its requirements at any time during the process; any such action will be communicated to all participants.
 15. Should you have any questions please do not hesitate to contact us at somalia.procurement@wfp.org.
- The United Nations World Food Programme



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EOI RESPONSE FORM

TABLE I. WFP REQUIREMENTS

A. Company / Organization’s competencies/ capacities			
	List of WFP requirements/evaluation criteria	Yes	Comments
1	Name and contacts of three previous clients for whom similar services were conducted	<input type="checkbox"/>	
2	Sample similar piece of work completed recently	<input type="checkbox"/>	
3	CVs of key staff outlining relevant qualification and experience	<input type="checkbox"/>	
4	Legal Capacity – Valid business registration/business licence and permits	<input type="checkbox"/>	



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TABLE II. SUPPLIER INFORMATION

B. Company/Organization’s Background Information			
1	Legal Name of Company/Organization:		
2	Full address:		
3	E-mail address:		
4	Website address:		
4	Telephone:	Fax:	
5	Contact person, title:	Tel./E-mail of contact person:	
6	Registration with UNGM	Yes <input type="checkbox"/> No <input type="checkbox"/>	UNGM No.
7	Type of Business	<input type="checkbox"/> Corporate/ Limited <input type="checkbox"/> Partnership <input type="checkbox"/> Other (specify):	
8	Goods / Services:		
9	Company/Organization Business Registration Number:	Date of Registration:	
10	Additional company/organization background information: [If applicable, insert not more than 100 words]		
A. Company/Organization’s Background Information			
1	Legal Name of Company/Organization:		
2	Full address:		
3	E-mail address:		
4	Website address:		
4	Telephone:	Fax:	
5	Contact person, title:	Tel./E-mail of contact person:	
6	Registration with UNGM	Yes <input type="checkbox"/> No <input type="checkbox"/>	UNGM No.
7	Type of Business	<input type="checkbox"/> Corporate/ Limited <input type="checkbox"/> Partnership <input type="checkbox"/> Other (specify):	
8	Goods / Services:		
9	Company/Organization Business Registration Number:	Date of Registration:	
10	Additional company/organization background information: [If applicable, insert not more than 100 words]		



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TABLE III. SUPPLIER FINANCIAL STATUS

B. Company / Organization's Financial Status	
Item	Value USD
Gross Turnover [Insert year]	
Gross Turnover [Insert year]	
Gross Turnover [Insert year]	
<i>Maximum contract value in relation to which your Company can be engaged:</i>	
USD 0 – 30,000	<input type="checkbox"/>
USD 30,000 – 100,000	<input type="checkbox"/>
USD 100,000 – 500,000	<input type="checkbox"/>
above USD 500,000	<input type="checkbox"/>
Maximum "Bank Guarantee" amount available to the Company/Organization	
Last two years audited accounts or alternative assessed within WFP's discretion are attached to prove the information stated above	<input type="checkbox"/>

TABLE IV. SUPPLIER RELEVANT EXPERIENCE

List at least 4 contracts in the last two years relevant to the provision of similar studies.

C. Company / Organization's Relevant Experience				
Commenced (Month / Year)	Completed (Month / Year)	Type of Contract	Total Value (USD)	Client

Provide CVs of senior staff (no more than three) [if applicable].

TABLE V. SIGNATORY & ORGANIZATION STAMP

D. Signatory	
Name of Company/Organization:	
Name of the authorized representative:	Signature:
Title:	Date: