

Terms of Reference (ToR)

for

Consultant to assess the investment tracking of corporate/private, national banks, regional banks, public financing, pension funds in climate harming business and green climate solutions.

1. Background and Overview

ActionAid is a global justice federation working to achieve social justice, gender equality and poverty eradication. It was founded as a charity in 1972, and throughout its history it has innovated and evolved its approach to better address the structural drivers of poverty and injustice. ActionAid believes people living in poverty and exclusion have the power within them to create change for themselves, their families and communities and ActionAid is a catalyst for that change. In the 1990s, ActionAid adopted a human rights-based approach to development, which is ongoing as its core approach. In 2003, the ActionAid International federation was established, comprising members in every region of the world, and headquartered in South Africa.

ActionAid International Nepal is a member of the federation, working for human rights, anti-poverty and gender equality. It is a non-governmental national social justice organisation established in 1982 and working locally in different provinces of Nepal. It is also a part of both national and global social justice movements and other civil society networks, alliances and coalitions.

This ToR is prepared to hire a Consultant/Firm who will conduct research to analyse private/corporate funding as CSR fund where it has been investing either in climate harming solutions or green solutions. Likewise, national bank investment through lending money and CSR money, regional banks (ADB etc), World Bank, public financing, and other funding mechanisms available in Nepal, are investing their money in green solutions and or climate harming solutions. Also, this assessment draws the volume of budget reviewing at least 5 years back budget allocation in different sectors focusing on climate financing and whether they are investing in green solutions that seem only like green washing or they are really investing in green solutions.

2. Objectives

To study on the investment tracking of corporate/private, national banks, regional banks, public financing, corporate social responsibility funds, pension funds to set the national level campaign targets.

In this context, the main objective of this assignment:

In this study we organize the in-depth assessment of the investment from private/corporate, public finance, national banks, regional banks (ADB, Asian Infrastructure Bank), international banks (World Bank), pension funds and other funding mechanisms available in Nepal whether funding in climate harming business or green climate initiative. The process will be mapping the potential investors at first, then dig out their detailed funding trend, amount of fund, sources of fund, investment in sectoral areas, how much of the funding goes to climate harming businesses and how much of funding goes to the green climate initiatives. Based on the study finding, ActionAid Nepal will set the campaign targets and money target.

The Consultant is expected to undertake the following responsibilities:

- Mapping potential banking institutions available in Nepal (eg. Nabil, NMB, BOK, NIC Asia etc), regional and international level (ADB, World Bank, IFC, or any subsidiaries of international banks etc).
- To undertake a desk review available resource, report, and other sources of information to understand the context and design the assessment methodology.
- To design the methodology and the research questions and facilitate the collection of information as required by the scope of the study.
- To conduct the inception meeting with AAI Nepal.
- To support and hold consultations with concerned stakeholders as per the scope of the research.
- To lead the research to collect the data and information and analyse the available data and information especially focusing on the climate harming funding and green climate funding.
- To consolidate the findings of the consultations, primary and secondary sources of information.
- To prepare a report based on available authentic and reliable information.
- To conduct a meeting with AAI Nepal to discuss the initial findings of the research.
- To incorporate feedback and comments from AAIN.
- To finalize the report in English.
- To prepare a policy brief based on research findings, both in Nepali and English languages.

3. Expected Output and Timeline

AAAN expected to complete this task as follows:

- Organize the inception meeting with AAI Nepal by the first week March 2023.
- Complete the literature review, consultation with concerned stakeholders and investors by the Mid of March.
- Prepare the draft report and organize a meeting with AAI Nepal for sharing the first draft report by 30th April 2023.
- Finalize the report and policy brief by 30th May 2023.

4. Timeframe

The length of consultancy assignment will be paid for 60 working days starting from 1st March 2023 to 30th May 2023.

5. Reporting

The Consultant will work closely with and report to Livelihood and Natural Resource Specialist from AAIN.

6. Consultancy Fees and Payment Modality

The Consultant will be paid for a maximum of 60 working days. Interested Firms/ Individuals should send their financial proposal and propose their consultancy fee (with detailed breakdown) for this assignment including applicable taxes. AAIN Team will facilitate the consultant's work through the provision of logistical and other support, as required, as per the AAIN's policy and compliance. Overall coordination will be undertaken by AAIN.

7. Consultant Specification

The consultant should be expert with the following competencies:

- Advanced degree in management and proven experience in banking or corporate sector.
- At least 7 years of working experience in related fields.
- Have good command in research design and research execution.
- Proven track record of similar types of research conducted in the past will be added advantages.
- Have good network and linkages in national policy makers and concern stakeholders.
- Good facilitation skills, communication, and coordination skills.
- Fluency in written and spoken Nepali and English languages.

8. Proposal Evaluation Criteria

Key Areas for Proposal Evaluation	Weightage
Technical Proposal <ul style="list-style-type: none"> • Understanding of assignment and delivery approach (20 points) • Demonstrated minimum 7 years of experience in related research field (15 points). • Demonstrated the capacity to carry out the assignment (20 points) • Evidence of customer/ client satisfaction in terms of services provided in past (15 points). 	70%
Financial Proposal <ul style="list-style-type: none"> • A clear financial proposal linked to the technical proposal, highlighting key costs and any reimbursable expenses (if any) (30 points). 	30%

Proposal Submission Guideline Interested consultancy firms/ individuals who meet the above requirement should send their technical and financial proposals to jobs.nepal@actonaid.org by 1 st March Feb 2023. Please provide At least three positive references/recommendations from past clients. Upon reviewing the Proposal, only short-listed companies will be contacted. Please note that ActionAid Nepal reserves the right to reject any proposal

All the very best!