

## LETTER OF INVITATION

The United Nations Capital Development Fund hereinafter referred to as UNCDF hereby invites you to submit an offer in accordance with the General Conditions of Contract and the Schedule of Requirements as set out in this Request for Offer (RFO).

Your offer is subject to the instructions provided in this letter and other such provisions, specifications and requirements as attached or incorporated herein by reference collectively called "Solicitation documents". Solicitation documents hereunder include:

Section 1: This Letter of Invitation  
Section 2: Instructions to Offer  
Section 3: Data Sheet  
Section 4: Schedule of Requirements  
Section 5: Conditions of Contract and Contract Forms  
Section 6: Offer Forms

- Form A: Checklist
- Form B: Offer Submission
- Form C: Offeror Information
- Form D: Joint Venture/Consortium/Association Information
- Form E: Eligibility and Qualification
- Form F: Technical Offer
- Form G: Price Schedule

Please prepare your offer in accordance with the requirements and procedure as set out in this negotiation RFO and submit it by the deadline for submission of bids set out in this document and in the supplier portal.

Should you require further clarifications, kindly communicate using the messaging functionality in the system. Offers must be submitted directly in the system following this link: <http://supplier.quantum.partneragencies.org/> using the profile you have in the portal.

We look forward to receiving your offer.

UNCDF PROCUREMENT UNIT



**Tender Overview**      Consultancy to support at least 20 MFIs in Tanzania have access to and use shared digital core banking solutions.



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1 Overview

1.1 General Information

**Title** Shared digital core banking solutions.  
**Contact Point** Lynda Kasagga  
**Outcome** Purchase Order  
**E-Mail** lynda.kasagga@uncdf.org  
**Reference Number** UNCDF 00283  
**Beneficiary Country** TZA

1.2 Tender Timeline

**Preview Date**  
**Open Date** 15/5/2025 10:06 PM  
**Close Date** 23/5/2025 11:59 PM  
**Time Zone** Moscow Standard Time

1.3 Response Rules

*This negotiation is governed by all the rules displayed below.*

	Rule
<input checked="" type="checkbox"/>	Negotiation is restricted to invited suppliers
<input checked="" type="checkbox"/>	Suppliers are required to respond with full quantity on each line
<input checked="" type="checkbox"/>	Suppliers are allowed to revise their submitted response

1.4 Terms

**Negotiation Currency** USD (US Dollar)

1.5 Attachments

File Name or URL	Type	Description
RFQ.docx	File	
EN Request for Offer Section 3	File	
EN Request for Offer Section 4	File	Section 4: Schedule of Requirements
EN Request for Offer Section 5	File	Section 5: Conditions of Contract and Contract Forms

## 2 Requirements

*\*Response is required*

### 2.1 Section 1. General Provisions

#### 1. General Instructions

This solicitation process is governed by the General Instructions to Offer attached herewith and Bid Data Sheet and other information listed herewith. By submitting a bid response to this tender supplier confirms to have read, understood, and accepted such provisions.

Attachments:

File Name or URL	Type	Description
EN Request for Offer Section 2	File	

#### 2. Bid Data Sheet

Bid Data sheet contains information and instructions specific to this Tender. By submitting a bid you confirm to have read, understood, and accepted the provisions herewith attached.

Attachments:

File Name or URL	Type	Description
EN Request for Offer Section 3	File	

### 2.2 Section 2. Preliminary Examination

Section Maximum Score: 8

#### \*1. General Conditions of Contract

Do you accept the General Conditions of Contract (GTCs) as specified herewith.

Maximum Score: 1

Attachments:

File Name or URL	Type	Description
2 - GTCs for Contracts (Goods	File	

*Target: Confirm acceptance of GTCs*

Select one of the following:-

☐ a. Confirm acceptance of GTCs (Score: 1) *(Response attachments are required)*

#### \*2. Proposal Validity

Do you accept that your bid is valid as required in General Instructions and Bid Data Sheet?

Maximum Score: 1

*Target: Confirm Bid Validity as required*

Select one of the following:-

- ☐ a. Confirm Bid Validity as required (Score: 1) *(Response attachments are required)*

**3. Form A: Checklist**

Please complete the returnable bidding forms in accordance with instructions and attach them as part of your bid response in the system. No alteration to the format of the forms shall be permitted and no substitution shall be accepted.

**\*4. Form B: Offer Submission**

Have you attached Offer Submission form as per template provided and duly signed by a legal representative of your company?

Maximum Score: 1

*Target: Bid Submission form provided*

Select one of the following:-

- ☐ a. Bid Submission form provided *(Response attachments are required)*

**\*5. Form C: Offeror Information**

Have you attached form C with information on the offeror using template herewith attached?

Maximum Score: 1

*Target: Bidder Information provided*

Select one of the following:-

- ☐ a. Bidder Information provided *(Response attachments are required)*

**\*6. Form D: Joint Venture/Consortium/Association Information**

Have you provided information on Joint Venture/Consortium/Association Information using the template and instructions attached?

Choose the applicable answer from options below.

Maximum Score: 1

Select one of the following:-

- ☐ a. Not applicable  
☐ b. Joint Venture *(Response attachments are optional)*  
☐ c. Consortium *(Response attachments are optional)*  
☐ d. Association *(Response attachments are optional)*

**\*7. Form E: Eligibility and Qualifications Form**

Have you provided the information required to establish eligibility and qualifications as per form E herewith attached?

Attach also supporting documentation as applicable.

Maximum Score: 1

Select one of the following:-

- ☐ a. Information provided *(Response attachments are required)*

**\*8. Form F: Technical Offer**

## Technical Offer

Provide the following:

- a brief description of your qualification, capacity and expertise that is relevant to the Terms of Reference.
- a brief methodology, approach and implementation plan outlining the number of days assigned by each of the expert proposed to each of the activities

team composition and CVs of key personnel

Maximum Score: 1

Target: Technical Bid offered

Select one of the following:-

- ☐ a. Technical Bid offered (Response attachments are required)

### \*9. Form G: Price Schedule

Have you provided Price Schedule as instructed?

Prices must be submitted directly in the system line items section, and detailed tables attached when requested.

Please make sure that the figures are consistent.

Maximum Score: 1

Select one of the following:-

- ☐ a. Price Schedule Provided (Response attachments are required)

## 2.3 Section 3. Eligibility Examination

Section Maximum Score: 3

### \*1. Legal Registration

Bidder is a legally registered entity and all relevant information is provided.

Upload scanned copies of legal registration documents according to options listed below and any other relevant document.

Maximum Score: 1

Select all that apply:-

- ☐ a. Certificate of Company Incorporation (Response attachments are required)
- ☐ b. Tax Registration Certificate (Response attachments are required)

### \*2. Sanctions List

Vendor is not suspended, nor otherwise identified as ineligible by any UN Organization, the World Bank Group or any other International Organisation in accordance with Section 2 Article 4.

Maximum Score: 1

Target: Not suspended or ineligible

Select one of the following:-

- ☐ a. Not suspended or ineligible (*Response attachments are required*)

**\*3. Bankruptcy**

Do you confirm that you have not declared bankruptcy or not involved in bankruptcy or receivership proceedings and there is no judgment or pending legal action against the company that could impair operations in the foreseeable future.

Maximum Score: 1

Select one of the following:-

- ☐ a. Not involved in Bankruptcy or similar proceedings (*Response attachments are required*)  
☐ b. Involved in bankruptcy or other similar proceedings

**2.4 Section 4. Qualifications**

Section Maximum Score: 3

**\*1. History of non-performing contracts**

Provide history of non-performing contracts that did not occur as a result of contractor default within the last 3 years.

Non-performance, as decided by UNDP, shall include all contracts where (a) non-performance was not challenged by the contractor, including through referral to the dispute resolution mechanism under the respective contract, and (b) contracts that were so challenged but fully settled against the contractor. Non-performance shall not include contracts where Employer's decision was overruled by the dispute resolution mechanism.

Maximum Score: 1

Select one of the following:-

- ☐ a. No history of non-performing contracts  
☐ b. Information provided (*Response attachments are required*)

**\*2. Litigations**

No consistent history of court/arbitral award decisions against the bidder for the last 3 years.

Maximum Score: 1

Select one of the following:-

- ☐ a. No Litigations (*Response attachments are required*)  
☐ b. Litigations history provided (*Response attachments are optional*)

**\*3. Relevant Previous Experience**

Please list only previous similar assignments successfully completed in the last 5 years.

List only those assignments for which the offeror was legally contracted or sub-contracted by the Client as a company or was one of the Consortium/JV partners. Assignments completed by the offeror's individual experts working privately or through other firms cannot be claimed as the relevant experience of the offeror, or that of the offeror's partners or sub-consultants, but can be claimed by the Experts themselves in their CVs.

The offeror should be prepared to substantiate the claimed experience by presenting copies of relevant





documents and references if so requested.

Maximum Score: 1

*Response attachments are required.*

2.5 Section 5. Technical Evaluation

Section Maximum Score: 102

\*1. Technical offer and specifications

Goods/works/services offered in the bid are substantially compliant and do not contain any material deviation(s) from the minimum required as included in Section 4: Schedule of Requirements

Maximum Score: 1

*Response attachments are optional.*

\*2. Technical Request for Proposal (70%)

- ☒ Expertise of the Firm 30%
- ☒ Methodology, Its Appropriateness to the Condition and Timeliness of the Implementation Plan 25%
- ☒ Management Structure and Qualification of Key Personnel 15%

Technical Proposal Evaluation Forms	
1	<p><b>Expertise of the firm (43 obtainable points)</b></p> <ul style="list-style-type: none"><li>- Must be legally registered and operating in Tanzania as a microfinance institution. The applicant must have a Bank of Tanzania approval to operate as a microfinance institution. (18 obtainable points)</li><li>- Must have a good understanding of technology services (shared services) provided by microfinance institutions in the Tanzanian market. (18 obtainable points)</li></ul>
2	<p><b>Methodology (36 obtainable points)</b></p> <p>The applicant's proposed methodology and approach is suited for the purpose of the project. The workplan is realistic and the project strategy covers risk management, communication, and project management good practices. The methodology should adhere to the project management plan.</p>



	<p><b>1. Design phase detailing the selection process.</b></p> <p><b>2. Implementation of the programme.</b></p> <p><b>3. Monitoring and evaluation.</b></p> <p><b>4. Documentation of the pilot model and business case. (36 obtainable points)</b></p>
3	<p>Management Structure and Qualification of Key Personnel <b>(21 obtainable points)</b></p> <p>Composition and structure of the team proposed. The proposed roles of the personnel are suitable for the provision of the necessary services <b>(5 obtainable points)</b></p> <p><b>Requirements of the Team leader (9 obtainable points)</b></p> <p><b>Qualification:</b></p> <ul style="list-style-type: none"><li>- A university degree (Bachelor's or Equivalent), computer science, statistics, mathematics, economics, business administration, or a related field</li></ul> <p><b>Experience</b></p> <ul style="list-style-type: none"><li>- Minimum of 5 years of experience leading or managing MFI cash flow in the following areas: digitalization, policy advocacy, compliance, etc. <b>(5 obtainable points)</b></li><li>- Fluent in English and Swahili would be considered an advantage</li></ul> <p><b>Requirements of the CBMS Expert (7 obtainable points)</b></p> <p><b>Qualifications :</b></p> <ul style="list-style-type: none"><li>- A university degree (Bachelor's or Equivalent) in relevant field such as Computer Science, Technology Management, or related disciplines</li></ul>



	<p><b>Experience:</b></p> <p>- At least 5 years of experience working in the microfinance sector, migration of core banking management system, data migration, adoption of new technology. <b>(3 obtainable points)</b></p> <p>Fluency in English and Swahili. <b>(2 obtainable points)</b></p>
	<b>Total</b>

Maximum Score: 100

Select one of the following:-

- ☐ a. Expertise of the firm(*Response attachments are required*)
- ☐ b. Methodology(*Response attachments are required*)
- ☐ c. Management Structure and Qualification of Key Personnel(*Response attachments are required*)
- ☐ d. Team leader(*Response attachments are required*)
- ☐ e. CBMS Expert(*Response attachments are required*)

**\*3. Delivery Requirements**

The bid is substantially compliant with the minimum Delivery Requirements included in Section 4: Schedule of Requirements and do not contain any material deviation(s).

Maximum Score: 1

*Response attachments are optional.*



3 Lines

Instructions

3.1 Line Information

Line	Category Name	Item	Target Quantity	Unit Price	Total Price	Additional Attributes
2-Deliverable 1.1 Procurement documents duly validated and cleared by UNCDF including solicitation documents for the section of the CBMS providers outlining technical specifications required, evaluation criteria, evaluation committee members	Temporary research and development services					



Line	Category Name	Item	Target Quantity	Unit Price	Total Price	Additional Attributes
3- Deliverable 2.1: Twenty signed contracts between CBMS providers and MFIs for the provision, subscription, training, usage and maintenance of the CBMS. Deliverable 2.2 Deliverables include training modules (PPT deck), an attendance list si	Temporary research and development services					



Line	Category Name	Item	Target Quantity	Unit Price	Total Price	Additional Attributes
4-Deliverable 3.1 Quarterly Performance report from the CBMS capturing the overall performance of the 20 MFIs. This entails; - 1 cumulative report for the 20 MFIs, - 20 reports for the individual MFIs (excel /PDF) A comprehensive list of	Temporary research and development services					



Line	Category Name	Item	Target Quantity	Unit Price	Total Price	Additional Attributes
5- Develop a business case that will document the pilot financing model as well as inform a scale up nationally . Deliverable 4.1 A Final report (word /PDF) structured as follows - Description of the project - Results from the pilot initiative	Temporary research and development services					