**ANNEX 1 – TECHNICAL PROPOSAL**

When responding to this Application, it is required to include the following information to demonstrate that the FI has the capacity to perform the work. The applicant(s) must submit their application in accordance with generally accepted format/template specified below. Failure to use the templates provided or the submission of incomplete documentation will result in the disqualification from this RFA:

|  |  |
| --- | --- |
| **Financial Institution Details** | |
| Legal Name of FI |  |
| FI's Registration (attach any relevant document) |  |
| DUNS Number and SAM Unique Identifying Numbers[[1]](#footnote-2) |  |
| Core business activity |  |
| Country of Registration |  |
| Type of FI |  |
| Physical Address |  |
| Postal Address |  |
| **Contact Details** | |
| Name |  |
| Job title |  |
| Mobile Number |  |
| Email |  |

|  |
| --- |
| **Project Details: Business/Operational Information** |
| 1. State the total amount in US Dollars to be committed for financing/investment into the Peruvian Amazon for the 12 months’ grant period, within the framework of the CATALYZE Peru program.   Breakdown amount into uses of capital.  This target financing/investment amount will be used to set milestone targets and milestone grant payment amounts, however, please note CATALYZE Peru reserves the right to adjust targets before award. |
|  |
| 1. State the current financial/investment products offered by your FI in the Peruvian Amazon, as well as any future products you plan to develop, which will enable your institution to expand your portfolio. State the number of new products that the FI intends to introduce and roll out in the coming 12 months (i.e., it may be zero, or 1, 2, etc.). |
|  |
| 1. Describe the current level of financing or investing in the Peruvian Amazon. Discuss any future plans to expand financing deals to the Peruvian Amazon, including challenges. Describe the quality of the team and strength/depth of the experience in lending/financing/investments to this region. |
|  |
| 1. Describe the strategy the FI will undertake to expand its financing/investment activities to enterprises working in the Peruvian Amazon. Please be as specific as possible, including the staff that will be involved, any potential partnerships, timelines, and how you will conduct targeting to identify deals that fit the “qualifying investment” |
|  |
| 1. Do you have an institutional program in place to mitigate or avoid any potential environmental impact and or to promote inclusive development in the Amazon region? Please detail what these programs consist of and the main progress and / or difficulties in their implementation. |
|  |
| 1. State the percentage of the total amount committed above that will be financing/investment to women-owned enterprises. |
|  |
| 1. How many micro, small, medium enterprises, and large enterprises or corporations in the Peruvian Amazon will be targeted for financing in the coming 12 months? Please see **Enterprise Size Definitions** section. |
|  |
| 1. State the amount of your own resources that your institution will commit to expanding lending/investment in the Peruvian Amazon. This financial contribution will not come from CATALYZE Peru award fee payments but will be from your institution to demonstrate commitment to the expansion of financing/investment activities. It is recommended but not compulsory that the Applicant submit a budget or any other approach to support the rationale of this amount. (Submitting a separate Excel file is acceptable). |
|  |
| 1. Describe how your institution will use the award payments earned through a grant with CATALYZE Peru to meet the financing target listed in Question 1. |
|  |
| 1. What resources do you currently have to finance the financial/investment indicated in point 1? Please specify the amount of these resources according to the financing’s source, indicating from which institutions the funds come. |
|  |

1. This does not apply if the proposed grant amount is less than $25,000. [↑](#footnote-ref-2)