



**To:** Offerors

**Date:** November 25, 2020

**From:** Procurement and Partnerships Team, INVEST Project; Implemented by DAI Global, LLC

**Subject:** Request for Proposals (RFP) INVEST-069: Scoping Digital Markets Investments Towards Bolstering Individual Rights

**Due:** **1:00 PM EST on Friday, January 8, 2021**

Dear Offerors:

Enclosed is a Request for Proposals (RFP) to support the implementation of DAI's INVEST project funded by the United States Agency for International Development (USAID). DAI invites firms to submit a proposal for work with the USAID Bureau for Development, Democracy, and Innovation; the Innovation, Technology, and Research Hub (ITR) to identify key tensions between expanding private capital and protecting human rights in developing country digital ecosystems and to develop guidance, best practices, standards, and/or codes of conduct that may help investors drive greater protection for human and digital rights through technology investments.

There are two phases of work envisioned under this subcontract, as described in the accompanying Statement of Objectives (SOO). The successful Offeror to this RFP will be awarded a single award Indefinite Quantity Contract (IQC), under which up to two Firm-Fixed Price Task Orders will be issued that encompass both phases:

- **Phase 1: Analysis of Key Tensions.** The successful Offeror to this IQC RFP will be awarded a Firm-Fixed Price Task Order subcontract to conduct an initial landscape analysis of the primary tensions between private sector capital growth and the protection/promotion of digital rights as detailed in the SOO. The scope of the subcontract will be finalized during award negotiations based on the Offeror's proposal submission.
- **Phase 2: Develop Solutions for Selected Tension(s).** Should the initial landscape analysis result in a "Go" decision by USAID ITR and INVEST to move forward, a Request for Task Order Proposal (RFTOP) will be issued to the successful IQC holder, and the subcontractor will be awarded a Firm-Fixed Price Subcontract for Phase 2 of the activity. In response to this RFP, Offerors should include their approach for Phase 2 to developing a set of evidence-derived guidance, best practices, standards, and/or codes of conduct of conduct for investors and other relevant digital ecosystem actors for one or more key tensions identified in the initial landscape analysis based on the SOO. The scope for this phase of work will be further refined following the completion of the landscape analysis of key tensions under Phase 1.

For this RFP, Offerors should provide prices for each Task Order (Phase 1 and Phase 2) individually, but the combined IQC ceiling for both phases work cannot exceed \$340,000. Please note that issuance of Task Order Two is not guaranteed given the dependence on the findings of

Phase 1 and “Go” decision required by USAID ITR and INVEST. Offerors/Consortiums must have the competencies to conduct both activities in the SOO.

**I. RFP Process and deadlines:** This solicitation will result in the award of one (1) IQC mechanism. The IQC will include an initial Fixed Price Task Order covering Phase 1 of the SOO. INVEST anticipates that a second Task Order for Phase 2 will be issued to the IQC holder following a “Go” decision and RFTOP, as outlined above. The **ceiling of the awarded subcontract is expected to be \$340,000**. Please note that because INVEST anticipates making only **one (1) IQC award within the stated ceiling**, Offerors should submit a proposal that is priced competitively for the stated work.

1. Submission of Questions – Questions must be submitted no later than **1:00 PM EST on Friday, December 11, 2020** via email to [INVEST\\_Procurement@dai.com](mailto:INVEST_Procurement@dai.com).
2. Submission of Proposals – Proposals must be submitted no later than **1:00 PM EST on Friday, January 8, 2021** via email to [INVEST\\_Procurement@dai.com](mailto:INVEST_Procurement@dai.com), copying [Matthew\\_Mitchell@dai.com](mailto:Matthew_Mitchell@dai.com) and [Leah\\_Day@dai.com](mailto:Leah_Day@dai.com). The subject line of the email should be your organization name, followed by “Submission under RFP INVEST-069: Scoping Digital Markets Investments towards Bolstering Individual Rights.” Please certify in your submission email a validity period of 60 days for the price(s) provided and include your organization’s DUNS number. Please limit file submissions to 10 megabytes or less.

**II. Composition of Proposal:** Your organization’s proposal should comprise of the following submission documents. The Technical Proposal and Cost Proposal should be prepared as separate files for independent evaluation, as follows below.

- **Technical proposals** should be submitted as a ten-slide presentation, using 12-point font size with one-inch margins. Graphics may be included, so long as text is clearly legible. If text or graphics are of poor resolution, the information provided may be excluded from consideration. Submissions in PowerPoint or in PDF are acceptable, although PDF is preferred along with an accompanying PowerPoint document.
- **Cost proposals** should be submitted in Excel format, and include within the spreadsheet all budget notes, if applicable. The cost proposal should clearly separate the proposed cost for each activity.

### **Part 1 – Technical Proposal**

Please limit your technical proposal to no more than **ten (10) slides**. The technical proposal is composed of the following three (3) sections:

1. **Technical Approach to Phase 1 (Landscape Analysis) and Phase 2 (Develop Solutions)** – Offerors will detail their approach to fulfilling the accompanying Statement of Objectives (SOO). The approach will clearly indicate how the proposed activities will result in the successful completion of all deliverables and milestones within the stated timeframe. Offerors should demonstrate clearly how they will perform the work to achieve the stated objectives. Offerors should also include what criteria and process will used to determine the key tensions between expanding private capital and protecting human rights in developing country

digital ecosystems. Additionally, given that the COVID-19 pandemic will require remote work, Offerors should note how they will facilitate remote activities, including analysis methodologies, expected number of virtual interviews, illustrative list of interviews, other data collection sources, etc.

2. **Institutional Capacity** – Offerors should provide details about the experience, networks, expertise, and/or capacity of the firm (or firms if a partnering arrangement is being proposed) or individual to carry out the proposed approach and complete the work as described. This should also include past performance information for similar activities as those requested under this RFP (see guidance below). Offerors should demonstrate their experience conducting assessments to identify and recommend activities for USAID or other donor support. Specifically, Offerors should demonstrate any relevant experience in the following areas:
  - a. Analysis of key tensions – Offerors should demonstrate their experience conducting assessments of issues related to human rights in the digital space. Additionally, Offerors should detail any experience developing comprehensive landscape analyses by collecting information/data through various sources, including personal interviews. Offerors should outline their network and experience working with private sector actors, investors and other digital stakeholders in the developing country context.
  - b. Develop solutions for selected tension(s) – Offerors should clearly demonstrate their experience and qualifications developing evidence-derived guidance, best practices, standards, and/or codes of conduct. Offerors should also describe experience identifying enabling environment and policy lever adjustments that could limit or reconcile tensions related to individual rights in the digital space.
3. **Management Plan/Staffing Structure** – Offerors should include details of personnel who will be assigned to the activities described in the technical approach, as well as a clear management plan in narrative form for the development, review, and submission of all associated deliverables, including a deliverable/milestone schedule.

Offerors are not required to be members of the Partner Network and are permitted to engage in partnering arrangements if it will aid in providing best value to USAID, regardless of whether organizations belong to the Partner Network. If a partnering arrangement is being proposed, please describe the nature of the arrangement, the specific technical value being contributed by each member of the team, and the appropriate management controls to ensure successful delivery. Firms may consider partnering with other firms that bring in complementary skill sets and experience.

In addition to the above, please include the following documents, in PDF or Word. These inputs will not be counted as part of the 10-slide limit:

- One (1) to two (2) examples of past performance relevant to this activity (limited to two (2) slides/pages per example). Examples should be within the past five (5) years.
- CV(s) of any individuals proposed in the staffing plan to conduct this activity (limited to two (2) slides/pages per individual)

**NOTE:** These inputs (past performance examples and CVs) will not be counted as part of the 10-slide limit and the format may be PDF or Word. A cover page will be considered a non-counting slide as well, and offerors should include one and list on it the names of all firms participating in the bid. No additional annexes or documentation are requested at this time.

## **Part 2 – Cost Proposal**

The contract type for the presumptive award will be a single Indefinite Quantity Contract (IQC) with up to two (2) task order subcontracts awarded by DAI Global, LLC. Please include your total proposed fixed price for Phase 1, along with details for specific deliverable pricing. Offerors should also provide the fixed price and illustrative deliverable pricing for Phase 2 based on the points detailed in the SOO and proposed by the Offeror. Only the Phase 1 pricing will be formally evaluated and incorporated at this stage; the illustrative Phase 2 pricing will serve as a reference point for future Task Order(s). Please note that these targets and the proposed budget will be validated during the rapid assessment stage and there will be opportunity to reassess and revise during the release of the RFTOP for Phase 2 but will not exceed the cumulative total of \$340,000.

Offerors must also include a cost breakdown of the daily/hourly rates for proposed personnel, any other direct costs, indirect costs, and fees if applicable, with a build-up to their total proposed price or include substantiating price reasonableness documentation/justification. Cost breakdowns included will be utilized to determine price reasonableness. Offerors can use the attached cost/budget template for guidance, but are not required to use it, as long as the cost proposal captures the necessary elements (i.e. deliverables table with breakdown of how the deliverable totals were calculated).

## **Part 3 – Evaluation of Proposal**

**Evaluation of Proposal:** DAI will use best value determination for the award of this Request for Proposals. A best value determination means that, in DAI's estimation, the selected offeror(s) will provide the greatest overall benefit to USAID in response to the requirements stated in this RFP. DAI may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and/or financial capabilities required to perform the work required. Proposals will be evaluated against a stated number of factors, including the overall proposed approach, past performance, specific qualifications in the identified sectors and other evidence substantiating the bidder's ability to deliver, including budget and time frame considerations. Specific preference will be shown for firms/individuals with demonstrated experience developing guidance, best practices, standards, and/or codes of conduct that support the protection of human and digital rights.

- 1. Technical Proposal:** The Technical Proposal will be scored and evaluated separately from the Cost Proposal. Technical panel reviewers will evaluate offerors on the following factors, consistent with the offerors' Technical Proposal. The Technical Proposal will be evaluated against the following criteria:

- a. **Technical Approach (50 points total)** - Points for this section will be awarded to firms describing their thoughtful technical approach to addressing the Statement of Objectives (SOO). The Offeror will be scored based on its presentation of a clear approach which reflects the requirements of this specific activity but also incorporates the offeror's competencies. The technical approach should clearly demonstrate the offeror's specific approach(es) to supporting the Bureau for Development, Democracy, and Innovation; the Innovation, Technology, and Research Hub (ITR) to understand how USAID can work with private sector actors and other donors to promote investments in developing country digital ecosystems that protect the digital rights of consumers and individuals. The successful Offeror will clearly demonstrate how they plan to identify key tensions between expanding private capital and protecting human rights in developing country digital ecosystems and then develop solutions for a selected tension(s). Offerors shall also offer critical questions and/or outline what type of information will be collected and through what method(s) in order to complete both phases of this activity:
- i. **Phase 1: Analysis of key tensions (25 points)** – A landscape analysis to identify the most pertinent, pressing, and salient tensions that may arise between private capital growth and investment and human rights protection in digital and online spaces.
  - ii. **Phase 2: Develop solutions for a selected tension(s) (25 points)** – Selecting one or more key tensions to develop a set of evidence-derived guidance, best practices, standards, and/or codes of conduct of conduct for investors and other relevant digital ecosystem actors.
- b. **Institutional Capacity (30 points)** – Points for this section will be based on information presented in the corresponding section and any submitted past performance examples. Offerors should clearly show relevant experience in providing actionable recommendations to USAID, other donors or other organizations to inform and design activities.

In line with their technical approach, the Offeror should demonstrate their:

- Ability to develop guidance, best practices, standards, and/or codes of conduct to protect human rights in digital and online spaces;
  - Experience conducting research and developing comprehensive landscape analyses by collecting information/data through various sources, including personal interviews;
  - Demonstrated expertise in digital rights and privacy rights;
  - Familiarity and experience with developing country contexts;
  - Advanced knowledge of and familiarity with USAID's Private Sector Engagement Policy and the newly-released Digital Strategy; and
  - Access to and experience working with technology investors, investment funds and private sector contacts within the technology space.
- c. **Management Plan/Staffing Structure (20 points)** - Points for this section will be based on the qualifications of proposed staff, clear delineation of the roles and responsibilities of each proposed staff and each proposed firm (if firms are partnering), and the demonstrated efficacy and clarity of the management plan. Proposals should provide a clear management plan in

narrative form for the development, review, and submission of all associated deliverables, including a proposed milestone schedule. If the Offeror is submitting a proposal with partners, the proposal should describe the nature of the arrangement (i.e. added technical value), the division of labor among the partners, and the appropriate management controls to ensure successful delivery. The Offeror should demonstrate their proposed staff's:

- Management plan for proposed activities, including clearly identified roles for each partner (if applicable);
- Timeline and deliverables that will result in objectives of SOO being met;
- Experience of staff to successfully implement objectives of the SOO;
- Demonstrated expertise in digital rights and privacy rights;
- Knowledge and experience working with private sector actors and investors to protect and preserve of human rights in digital and online spaces.

2. **Cost Proposal:** Cost will be evaluated separately from the technical approach, with due consideration for realism, price reasonableness, and allowability consistent with US government cost principles. Evaluation for this section will be dependent upon all information presented by the Offeror in their deliverable table and supporting cost information, as well as its alignment with the proposed technical approach.

At the proposal stage, Offerors should include the total fixed price for both Task Order One and Task Order Two, along with details for specific deliverable pricing for Task Order One. The illustrative pricing for Task Order Two will be evaluated as an indication of how the Offeror will structure and price its work under the subsequent Task Order. This budget will be analyzed for cost reasonableness of the deliverable price as well as the cost build-up.

Once the IQC is issued, the budget for any subsequent Task Order, if issued, will be analyzed for price reasonableness at that stage. INVEST will compare subsequent Task Order pricing against the pricing proposed during this competitive phase. Any significant deviation from the pricing submitted at the IQC stage will need to be fully documented and justified at the Task Order level, and will be subject to approval by DAI.

**Offeror's Agreement with Terms and Conditions: Please visit the [INVEST Procurement Forecast](#) website for RFP Terms and Conditions.**

The completion of all RFP requirements in accordance with the instructions in this RFP and submission to DAI of the technical and price proposals will constitute an offer and indicate the Offeror's agreement to the terms and conditions in this RFP and any attachments hereto. DAI is not required to accept and/or evaluate proposals that do not conform to the instructions of the RFP, and additionally, DAI may reject all proposals and not award a subcontract for this RFP. DAI reserves the right to award a subcontract without discussion and/or negotiation; however, DAI also reserves the right to conduct discussions and/or negotiations, which among other things may require an Offeror(s) to revise its proposal (technical and/or price). By submitting an offer, Offerors agree to comply with the general terms and conditions for an award, including [Representations and Certifications](#) compliance. Offerors must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, Offerors certify that

they have not/will not attempt to bribe or make any payment to DAI employees in return for preference. Issuance of this RFP in no way obligates DAI to award a subcontract, nor does it commit DAI to pay any costs incurred by the Offeror in preparing and submitting the proposal. DAI reserves the right to award a subcontract to one organization or to issue multiple awards to different organizations based on the results of our evaluation

Thank you,

**DAI INVEST Procurement and Partnerships Team**

[INVEST\\_Procurement@dai.com](mailto:INVEST_Procurement@dai.com)

**Statement of Objectives for RFP INVEST-069**  
**USAID's Bureau for Development, Democracy, and Innovation; the Innovation, Technology, and Research Hub – Scoping Digital Markets Investments towards Bolstering Individual Rights**

**INTRODUCTION:**

The United States Agency for International Development (USAID) recognizes that market-based solutions are a key component in solving the world's development challenges. USAID's Private Sector Engagement team is working to expand collaboration with the private sector and pioneering approaches that catalyze investments into emerging markets.

Increasingly, private investors and businesses are looking at emerging markets for new opportunities. However, investing in these markets is complex, and USAID has an important role to play in mobilizing investment into high-impact areas.

New forms of collaboration are required to facilitate these investments. In September of 2017 through a contract awarded to DAI, USAID set up the INVEST mechanism to build and engage a network of partner organizations with valuable investment and finance expertise, including those that have not worked extensively with USAID in the past.

INVEST enables USAID Missions, Bureaus, and Independent Offices to quickly access niche expertise from this diverse network of partner organizations. These partners work alongside USAID to deliver customized financing solutions that address investment constraints, mobilize additional private capital, and produce development results for a variety of sectors and geographies.

INVEST pairs innovative technical approaches with streamlined and user-friendly procurement and subcontracting processes. These simplified processes level the playing field, ensuring that USAID can work with the best firm for the job, regardless of that firm's size, locality, or previous experience with government contracting.

**CHALLENGE:**

The growth of digital technology has opened up many new opportunities for private investment in the developing world, from alternative credit scoring that has unlocked a new cadre of qualified borrowers, to online work that creates job opportunities across global markets, to the creation of entirely new job categories (cybersecurity) and commodities (digital data). In many cases, these innovations are additive to developing economies, creating opportunities for work and capital investment that would otherwise be absent. But too often, increasing private capital growth through digital means are tempered by the erosion of the rights of those purported to benefit.

Digital technology applications and use can be explicitly rights-eroding as evidenced by the development of AI-backed "social credit scoring" developed by the Chinese government, or through dedicated digital surveillance systems, such as those in Zimbabwe and Ecuador<sup>1</sup>, that limit freedoms. However, there are also examples of more subtle technology-enabled rights

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<sup>1</sup> <https://www.nytimes.com/2019/04/24/technology/ecuador-surveillance-cameras-police-government.html>



infringements, such as data brokers profiting from the sale of private, personal information mined through apps with minimal privacy protections. And while the growth of digital gig economy work in the developing world opens new markets to otherwise excluded workers, core questions about appropriate labor rights, work security, and potential structural inequities (e.g. power and resource asymmetries) are embedded in digital gig economy trends that we see today.<sup>2</sup> Often, the factors driving the development of these types of privacy-infringing or rights-infringing technologies may stem from the natural incentives of private technology companies to broaden their market reach or maximize profit margins.

The tensions that exist between expanding private capital and protecting human rights may appear through the central role personal data can play in fueling digital solutions in the developing world. For example, the ability of tech companies to develop tailored digital services (from agricultural profiles to digital identity to digital credit lending) depends on the availability of personal digital data often bought and sold by data brokers unbeknownst to those whose data is sold. Similarly, the rise of social media brings with it a range of threats to deeply held democratic values,<sup>3</sup> like infringements on privacy and digital surveillance.

In striving to promote both private sector growth in the digital age and rights protection in digital and online spaces, USAID aims to better understand critical questions around optimizing both private sector investment and rights protection (e.g. Sample questions include: How are companies navigating these tensions, and where might there be opportunities to better promote rights protection alongside capital investment? What can be done to gain visibility into the perspectives of key digital stakeholders such as data brokers and end users to better inform how USAID might shape approaches to strengthening and implementing nascent frameworks that support individual rights in growing digital ecosystems? How might companies relying on digital gig workers shape their policies and interactions with gig workers in the developing world to not only seek business development, but promote protection of rights to fair labor and decent work? What considerations might donors and private capital investors make in developing standards to ensure that the growth of digital ecosystems does not come at the expense of rights for laborers in the developing world?).

As articulated in the USAID Digital Strategy (see link next page), digital systems and policies should promote freedom of expression and action, equal opportunity, and self-determination. The USAID notion of “digital rights” encompasses both individuals’ online activities and the impacts of the digital world on their “offline” lives as well. In addition to protecting individual rights, USAID’s approach to digital development strengthens digital ecosystems in ways that meet the needs of all segments of society, and in particular traditionally-underserved groups such as the poor, women, youth, and people living with disabilities.

#### **BACKGROUND:**

The Innovation, Technology, and Research (ITR) Hub at USAID seeks to promote responsible private capital growth and investment as well as the protection and preservation of human rights in digital and online spaces. However, as USAID pursues both economic growth and rights protection, the Agency believes these two goals may, at times, conflict. When these two

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<sup>2</sup> <https://www.weforum.org/agenda/2020/03/digital-platforms-gig-workers-labour-rights/>

<sup>3</sup> <https://www.journalofdemocracy.org/articles/the-road-to-digital-unfreedom-three-painful-truths-about-social-media/>

pursuits are in tension, USAID needs to 1) understand the drivers of key tensions that may arise between the protection of individuals' rights and the (private sector-led) expansion of technology and online connection and 2) create a set of evidence-derived best practices, practical guidance, shared strategies, and/or formal codes of conduct for digital ecosystem actors (e.g., start-up companies; investors, providers of digital infrastructure, platforms, services; or civil society groups working on digital rights) for protecting individual rights while successfully growing private markets. USAID ultimately aims to identify where additional guidance, standards, or other interventions could lessen tensions and identify synergies between rights preservation and private capital growth through investment into responsible companies and approaches.

#### **OBJECTIVES AND ACTIVITIES:**

In line with the USAID Digital Strategy<sup>4</sup> and the Agency's Private Sector Engagement Policy<sup>5</sup>, ITR seeks to understand how the Agency can work with private sector actors and other donors to promote investments in developing country digital ecosystems that protect the digital rights of consumers and individuals. USAID believes that investor behavior can help shape the behavior of companies and actors in the digital ecosystem, and that corporate policies can serve to either protect or erode digital and human rights and protections. Therefore, USAID and INVEST are seeking a partner to develop guidance, best practices, standards, and/or codes of conduct that may help investors drive greater protection for human and digital rights through technology investments.

USAID is interested in both issues that affect specific stakeholder groups, such as digital workers, or digital borrowers, as well as the tensions that affect human rights more generally, such as increased risk of privacy threats enabled by increasingly omniscient digital technology. USAID wants to identify how these tensions arise, where they are most prominent, and what potential leverage points exist that donor agencies and other key stakeholders might use to encourage private investment in companies that protect and enhance human and digital rights while creating social value. Understanding the approaches, policies, and hallmarks of these companies will enhance USAID's ability to share recommendations and standards with the investment community and civil society groups to help call attention to strategies that work and encourage responsible investment.

The overarching objective of this activity is to determine the guidance, best practices, standards, and/or codes of conduct for digital ecosystem actors that have been proven to incentivize the protection of individual rights while successfully growing private markets, rather than focusing on the issues of digital rights protection without solutions. The products of this activity will support the development of successful business models and strategic investment guidance for investors that strengthen developing countries' digital ecosystems by identifying and promoting synergies between inclusive private sector growth and the integrity of individual rights. The completed outputs are expected to be available for distribution by USAID to other donors, implementers, private sector funders and civil society actors. Work for this activity should also detail (in)adequacies of current law and policy, particularly how consumer protection laws may be outdated and how consumer protection laws may be updated and applied in developing digital economies to better protect rights. Understanding these law and policy approaches can

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<sup>4</sup> <https://www.usaid.gov/usaid-digital-strategy>

<sup>5</sup> <https://www.usaid.gov/work-usaid/private-sector-engagement>

limit or reconcile tensions between private capital growth and individual rights in the digital space. This activity will also attempt to identify the tradeoffs of various policy, design, or investment choices: What are the hidden costs of digital investments? What kinds of strategies determine who loses and wins when investments are made in digital ecosystems? What methods can be used to ensure that rights are considered from the start (e.g. policy choices, harmonization of rights frameworks between countries/companies, etc.)?

The work will involve desk-based research and virtual interviews with key informant stakeholders including enterprises, civil society groups, institutional and other investors, and intermediaries identified by the to identify key tensions and actionable incentives for implementing best practices that effectively mobilize private capital in rapidly evolving digital markets in ways that foster recognition of and protection for digital rights. A list of the key informant stakeholders to interview will be determined by the partner, with input from the USAID/DDI/ITR and DAI INVEST teams.

It is envisioned that the assistance will be separated into two distinct activities: 1) a landscape analysis to identify the most pertinent, pressing and salient tensions that may arise between private capital growth and investment, and human rights protection in digital and online spaces, and 2) selecting one or more key tensions to develop a set of evidence-derived guidance, best practices, standards, and/or codes of conduct of conduct for investors and other relevant digital ecosystem actors.

### **Phase 1: Analysis of Key Tensions**

- Initial landscaping of primary tensions between private sector capital growth and protection/promotion of digital rights in developing country digital ecosystems, with a particular focus on tensions that arise (and/or good practices that occur) in contexts where formal national legal frameworks for rights-protection are limited or absent;
- Interviews with investors, key stakeholders, digital rights experts, and/or digital and human rights organizations to identify the key tensions for private sector investment in developing countries technology sectors that can result in the erosion of digital rights in exchange for optimizing growth; and
- In collaboration with USAID, select one or more key tension(s) to develop evidence-derived guidance, best practices, standards, and/or codes of conduct for investors and other relevant digital ecosystem actors.

### **Phase 2: Develop Solutions for Selected Tension(s)**

- Identification and consolidation of best practices and strategies successfully implemented that support responsible investment in developing countries' digital ecosystems while concurrently protecting individual rights, focusing on identifying the *incentives* for implementing best practices and outlining real-world examples of rights protection or investment strategies in the digital space that have been effective in protecting rights (or promoting the protection of rights);
- Develop guidance, best practices, standards, and/or codes of conduct for investors seeking strategic investment opportunities in the technology sector of developing countries that help protect digital rights for the selected tension(s); and

- Detail findings and recommendations to USAID, other donors, and investors on strategic use of resources to facilitate growth while protecting digital rights.

**DELIVERABLES & IMPLEMENTATION TIMEFRAME:**

Deliverables are expected to include actionable recommendations based on evidence from digital ecosystem investments that have protected (or not protected) rights in a variety of contexts, including local enabling environment and policy lever adjustments that could be driven by donors, implementers, private sector funders, and civil society actors. The expected deliverables should take into consideration opportunities to engage and strengthen the role of local business communities, civil society organizations, technology companies, and governments in shaping digital ecosystems in ways that promote/protect rights. Expected deliverables include:

*Phase 1:*

- A landscape analysis identifying and explaining the key primary tensions between private sector capital growth and protection/promotion of digital rights in developing country digital ecosystems.

*Phase 2:*

- Guidance, best practices, standards, and/or codes of conduct for investors seeking strategic investment opportunities in the technology sector of developing countries that help preserve individual privacy and rights in digital spaces, focusing on the actionable incentives for implementation;
- Recommendations for enabling environment and policy lever adjustments that could be driven by donors, implementers, private sector funders and civil society actors that limit or reconcile tensions between private capital growth and individual rights in the digital space; and
- Detailed findings and recommendations for USAID and other donors and investors about encouraging growth of existing and emerging technology companies while protecting digital rights.

The partner may also develop additional deliverables that support the technical approach, providing USAID and stakeholders with necessary tools and/or information that help shape digital ecosystems in ways that promote/protect rights. Illustrative deliverables may include:

*Phase 1:*

- Lessons learned from interviews with investors, key stakeholders, digital rights experts, and/or digital and human rights organizations to identify the key tensions for private sector investment in developing countries technology sectors;

*Phase 2:*

- Illustrative case studies on best practices and effective partnerships for protecting digital rights while encouraging growth;

**General Implementation Structure:**

*Onboarding and Work-Planning*

- The successful Subcontractor, USAID/DDI/ITR, and DAI INVEST teams will meet for an implementation kickoff meeting. The purpose and goal of this meeting is to align expectations and contexts and plan for the activities listed below.

- Partner Onboarding: DAI will work closely with USAID/DDI/ITR to provide the selected partner(s) with all necessary context, as well as to develop the work plan(s) for the determined countries.

*Implementation*

- Project Implementation: The selected partner(s) will implement the work as prescribed by the work plan. DAI INVEST will provide management support and technical oversight throughout all activities and anticipates working closely with the subcontractor(s) and maintaining ongoing communications through periodic (e.g. weekly and monthly) check-ins/reporting as well as possible onsite meetings. USAID staff will be engaged throughout implementation, supporting the initial identification of challenges and root causes, and providing guidance and feedback as appropriate throughout the activity.

The activities outlined above are estimated to take place over a roughly 7-9 month period starting around January 2021. A deliverables table with an illustrative timeline is offered below; however, offerors may propose alternate timelines, work plan, and level of effort associated with the various components of the activity.

| Description  | Illustrative Timeframe |
|--|------------------------|
| <b>PHASE 1</b>   |                        |
| Onboarding & Work Planning   | 2 Weeks                |
| Interviews with investors and key stakeholders   | 4-6 Weeks              |
| Completion of comprehensive landscape analysis   | 4-8 Weeks              |
| USAID/INVEST review and feedback of deliverable  | 2 Weeks                |
| Select key tension(s) to develop actional solutions in collaboration with USAID  | 1 Week                 |
| <b>PHASE 2</b>   |                        |
| Development of guidance, best practices, standards, and/or codes of conduct that includes case studies of effective partnerships                         | 4-6 Weeks              |
| USAID/INVEST review and feedback of deliverable  | 2 Weeks                |
| Research enabling environment and policy lever adjustments that could be driven by donors, implementers, private sector funders and civil society actors | 4-6 Weeks              |
| USAID/INVEST review and feedback of deliverable  | 2 Weeks                |
| Development of final deliverable of lessons learned  | 2-3 Weeks              |

**Preferred Qualifications:**

- Knowledge of and familiarity with USAID’s Private Sector Engagement Policy and the newly-released Digital Strategy;
- Familiarity with the work of USAID’s Innovation, Technology, and Research Hub (formerly the Center for Digital Development within the U.S. Global Development Lab);
- Demonstrated expertise in digital rights and privacy rights;
- Extensive contacts with technology investors and funds;
- Extensive private sector contacts within the technology space;

- Demonstrated experience developing comprehensive landscape analyses by collecting information/data through various sources, including personal interviews;
- Extensive knowledge of and experience in private sector initiatives around development, especially those engagements using technology;
- Strong familiarity with USAID and/or the international development sector;
- Ability to be flexible and responsive to changing needs, especially in light of COVID-19 concerns;
- Excellent written and verbal communication skills, including producing reports in digestible, clear products.