

APPENDIX

1. INDICATIVE BUDGET

Provide an indicative budget considering all the components or activities foreseen for the development of the study (professional fees, data collection, intervention activities and inputs, etc.). Funds from this call for research proposals must be used exclusively to cover research activities, data collection or access to secondary data sources, and the certification of the research proposal by an ethics committee (IRB). The amount of funding requested must be clearly justified.

Funds may not be used to cover the costs of dissemination materials (dissemination of the products of this call will be the responsibility of the IDB), travel expenses, or the purchase of goods and services. The maximum percentage of administrative costs (overhead) is 15% of the direct costs.

Provide the indicative budget using the table below (it is possible to modify this table to reflect all activities/components).

ACTIVITY / COMPONENT	DESCRIPTION / JUSTIFICATION	TOTAL
Literature review & desk research	Review of Bolivian and LAC empirical studies; theoretical framework	US\$5,000
Qualitative and quantitative data collection for behavioral diagnostic	Stakeholder interviews, digital survey design, field coordination.	US\$21,000
Pilot design and implementation	Design and rollout of behavioral intervention with partners.	US\$5,500
Evaluation and analysis	Data collection (post-pilot), analysis, and reporting.	US\$5,000
Project management and coordination	Planning, local liaison, deliverables coordination	US\$4,500
Administrative costs (max 15%)	Indirect costs (HR, reporting, finance, etc.)	US\$2,500
TOTAL		US\$43,500

2. EXECUTION PERIOD AND CALENDAR OF ACTIVITIES

Describe the proposed implementation period and provide a detailed schedule of activities. If the proposal includes implementation and field work activities, provide the work schedule and a description of all activities.

EXECUTION PERIOD AND CALENDAR OF ACTIVITIES

The proposed project will be implemented over 18 months, from April 2025 to October 2026, and will consist of two main phases:

Phase 1 – Behavioral Diagnostic and Research Paper (April–December 2025)

Date	Activity
April 14, 2025	Announcement of selected proposals
April–May 2025	Launch internal project planning and begin literature review
May 22, 2025	Submission of the outline of the paper
May–June 2025	Conduct qualitative fieldwork (e.g., stakeholder and expert interviews)
June 1, 2025	Participation in the first virtual discussion seminar
June–July 2025	Conduct quantitative survey, analyze diagnostic data, and prepare first draft
August 1, 2025	Submission of the first draft of the research paper
August 4, 2025	Participation in the second virtual discussion seminar
August–September 2025	Revise paper based on feedback; develop pilot intervention concept
October 1, 2025	Submission of the second draft of the research paper
October 6, 2025	Participation in the third virtual discussion seminar
October–November 2025	Finalize pilot design and coordinate with local partners
December 1, 2025	Submission of the final version of the research paper

Phase 2 – Pilot Intervention and Evaluation (January–October 2026)

Date	Activity
January–March 2026	Pilot implementation planning, approvals, and training
April–August 2026	Field implementation of pilot behavioral intervention
September–October 2026	Evaluation of pilot (data collection, analysis, and write-up)

Note: The specific scope and operational complexity of the pilot intervention will be shaped by findings from the diagnostic phase and refined through consultations with local stakeholders. While the calendar allocates defined windows for implementation and evaluation, we will adjust the intensity and delivery model to ensure feasibility and rigor within the 18-month timeframe.

REFERENCES

- Akerlof, G. A., & Kranton, R. E. (2000). *Economics and identity*. Quarterly Journal of Economics, 115(3), 715–753.
- Andersen, L. E., & Muriel, B. (2007). *Informality and productivity in Bolivia: A gender differentiated empirical analysis*. Institute for Advanced Development Studies (INESAD), Working Paper 07/2007.
- Bosch, M., González, S., & Silva Porto, M. T. (2021). *Chasing informality: Evidence from increasing enforcement in large firms in Peru*. Inter-American Development Bank.
- Bruhn, M., & McKenzie, D. (2014). *Entry regulation and formalization of microenterprises in developing countries*. World Bank Research Observer, 29(2), 186–201.
- Canelas, C., & Niño-Zarazúa, M. (2023). *Informality and pension reforms in Bolivia: The case of Renta Dignidad*. The Journal of Development Studies, 59(6), 1002–1021.
- de Andrade, G. H., Bruhn, M., & McKenzie, D. (2013). *A helping hand or the long arm of the law? Experimental evidence on what governments can do to formalize firms*. World Bank Policy Research Working Paper No. 6435.
- Kettle, S., Hernandez, M., Sanders, M., & Hauser, O. P. (2016). *Behavioral interventions in tax compliance: Evidence from Guatemala*. World Bank Policy Research Working Paper No. 7690.
- Loayza, N. V., & Rigolini, J. (2011). *Informal employment: Safety net or growth engine?* World Development, 39(9), 1503–1515.
- Sheild Johansson, M. (2020). *Taxes for independence: Rejecting a fiscal model of reciprocity in peri-urban Bolivia*. Social Analysis, 64(2), 18–37