

Juan Navarrete

Affiliated Expert | Senior Consultant

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SUMMARY

Juan is an Affiliated Expert at joyn-coop. He has an eleven-year experience in inclusive finance, during which he has worked for the public sector, an NGO, and offered his services as a senior independent consultant. Juan's areas of expertise have focused in client-impact evaluation-related topics (such as randomized control trials and focus groups) and institutional assessments through quantitative and qualitative ad hoc tools. As the Executive Director of PlaNet Finance's Mexico office, Juan has also managed specialized Technical Assistance projects to microfinance institutions in a variety of topics.

EDUCATION

Master of Philosophy in Development Studies, University of Oxford, St. Antony's College, focus on institutional economics and finance

Bachelor of Arts in Economics, *Instituto Tecnológico Autónomo de México* (ITAM), Mexico City, focus on economic growth and convergence

PROFESSIONAL EXPERIENCE

Independent senior consultant: Consultancy for multilateral development organizations, foundations and governments

Examples of Juan's work include:

- Global Portfolio Review (*Country Sector Programs & Youthstart*) and *Microlead* Mid-Term Evaluation (over 100 investments in over 20 *Least Developed* countries in Africa and South East Asia), Client: Financial Inclusion Practice Area (FIPA) of the *United Nation's Capital Development Fund* (UNCDF), 2011-2012
- Independent Evaluation of IFC's Investment and Advisory Services in PROGRESEMOS-Mexico, Client: International Finance Corporation (IFC), 2011-2013
- Independent Evaluation of a Financial Education Initiative, Client: Savings Bank Foundation for International Cooperation (SBFIC), 2011
- Impact study on the sustainability and outreach of savings-based rural financial cooperatives serving highly marginal municipalities in the seven regions of the *Proyecto de Asistencia Técnica al Microfinanciamiento Rural* (PATMIR) program, Client: Mexico's Ministry of Agriculture, 2006

Consultant for an NGO: Executive Director in PlaNet Finance's Mexico office (2008-2009)

Examples of Juan's work include:

- Development and Implementation of rural credit methodologies for seven financial institutions from the ASOMIF network in Perú. Client: Multilateral Investment Fund from the Inter-American Development Bank (IADB)
- Development and Implementation of a microcredit product for small business start-ups among the rural clients of the Toledo Teacher's Credit Union in Belize, in the context of the *Grant Fund for the establishment and/or strengthening of microfinance and small business technical assistance facilities in the banana-producing communities of southern Belize*, Client: European Union
- Managed the development and implementation of a diversity of specialized technical assistance projects for financial service providers (managed a team of ten consultants), Clients: Financial Service Providers in Mexico

Public sector: Project Deputy Director at the government's National Savings and Financial Services Bank (BANSEFI), in Mexico City, (2002-2005), and Analysis Deputy Director at the Social Development Ministry (SEDESOL), (1995-1998)

Examples of Juan's work include:

- As officer in charge of the Monitoring and Evaluation (M&E) of BANSEFI's *Savings and Credit Strengthening and Rural Microfinance Capacity Building Technical Assistance Project*, led the design and implementation of a 6,000 household panel survey, as well as the contents and structure of qualitative in-depth household interviews, together with a team of other microfinance specialists, Employer: National Savings and Financial Services Bank (BANSEFI)
- As the representative of *L@Red de la Gente* (The 'People's Network'), a commercial alliance between BANSEFI and non-bank financial intermediaries, participated in the network's business plan design and carried out brand promotion, achieving the affiliation of sixty small credit union financial institutions to the network, Employer: National Savings and Financial Services Bank (BANSEFI)
- As Analysis Deputy Director, carried out regional impact analysis of social policy, Employer: Social Development Ministry (Mexico)
- As Analysis Deputy Director, performed evaluation of social investment projects, Employer: Social Development Ministry (Mexico)

LANGUAGES

Spanish, English & French

COUNTRY EXPERIENCE

Asia: Bhutan, India, Laos
Americas: Belize, Ecuador, Mexico, Perú, El Salvador

SELECTED PUBLICATIONS

On case studies in Microfinance (2004): with Lisa Taber, Carlos Cuevas and Gabriela Zapata: *Integrating the Poor into the Mainstream Financial System: The BANSEFI and SAGARPA Programs in Mexico*, in 'Scaling Up Poverty Reduction: Case Studies in Microfinance', CGAP and The World Bank, Shanghai Conference, May 2004

On financial market development and public policy (2003): with Carlos Cuevas: *The Financial Sector*, in 'Southern States Development Strategy', The World Bank, September 2003

On institutional economics (2001): *Do Institutions Matter? A Critique of Empirical Tests*, in 'La Gaceta de Ciencia Política', no. 1, Year II, Autumn-Winter 2001, ITAM

On economic growth and convergence (1994): *Convergence: A Study for the States of Mexico*, Working Paper no. 42, Department of Economics, CIDE, 1994