



REQUEST FOR EXPRESSION OF INTEREST

SELECTION OF INDIVIDUAL CONSULTANT

**CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR
COMPUTATION OF POVERTY STATISTICS USING
MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION**

REFERENCE NUMBER: SADC/3/5/2/182

13th OCTOBER 2021

1. The SADC Secretariat is inviting **Individual Consultants** to submit their CV and Financial Proposal for the following services:

“CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION”

The Terms of Reference defining the minimum technical requirements for these services are attached as Annex 1 to this Request for Expression of Interest.

2. **Only Individual Consultants are eligible for this assignment provided that they fulfil the following eligibility criteria:**

a) they are not bankrupt or being wound up, are having their affairs administered by the courts, have entered into arrangements with creditors, have suspended business activities, are being subject of proceedings concerning those matters, or are being in any similar situations arising from similar procedures provided for in the national legislation or regulations of the SADC member states;

b) they have not been convicted of offences concerning their professional conduct by a judgment which has the force of res judicata; (i.e. against which no appeal is possible);

c) they have not been declared guilty of grave professional misconduct proven by any means which SADC Secretariat can justify;

d) they have fulfilled obligations related to the payments of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those countries where the contract is to be performed;

*e) they have not been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the SADC Secretariat' financial interests;
or*

f) they are not being currently subject to an administrative penalty.

3. The maximum budget for this contract is **US\$12,000.00 inclusive of professional fees and reimbursable expenses**. Proposals exceeding this budget will not be accepted.

4. Your Expression of Interest must be presented as per Standard Expression of Interest Forms attached as Annex 2 to this REOI, in the English language and be accompanied by copies of all the indicated supporting documents. If the supporting documents are not in English, these shall be accompanied by a certified translation into English.

5. Proposal should be submitted by email clearly marked “REFERENCE NUMBER: SADC/3/5/2/182 - CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION” to the email address below:

povertystats@sadc.int

6. The deadline for submission of your proposal, to the address indicated in Paragraph 5 above, is **Wednesday 3rd November 2021 at 15:00hours local (Botswana) time**
7. Your CV will be evaluated against the following criteria.

Category	Points
Qualification and Skills	30
General professional experience	10
Specific professional experience	60
Total	100

Technical Evaluation

The minimum technical score required to pass is **70 points**. Bids not reaching 70 points shall be considered not compliant. Out of the 70 points threshold, the best technical offer is awarded 100 points. The others receive points calculated using the following formula: Technical score = (final score of the technical offer in question/final score of the best technical offer) x100

Financial evaluation

The Evaluation Committee shall proceed with the financial comparisons of the fees between the different financial offers (fee based are established in the main Contract while for Global Price specific offers will be considered). Both the provisions for reimbursables and expenditure verification shall be excluded from the comparison of the financial bids. The offer with the lowest total fees shall receive 100 points. The others are awarded points by means of the following formula: Financial score = (lowest total fees /total fees of the tender being considered) x 100.

The best value for money is established by weighing technical quality against price on an **80/20** basis. This is done by multiplying:

- the scores awarded to the technical offers by **0.80**
- the scores awarded to the financial offers by **0.20**

8. Your proposal should be submitted as per the following instructions and in accordance with the Terms and Conditions of the Standard Contract attached as Annex 3 to this REOI:

(i) PRICES:

The financial proposal shall be inclusive of all expenses deemed necessary by the Individual Consultant for the performance of the contract and must not include any of the following taxes in Purchaser country: value added tax and social charges or/and income taxes on fees and benefits.

(ii) EVALUATION AND AWARD OF THE CONTRACT:

Expressions of Interest determined to be formally compliant to the requirements will be further evaluated technically.

An Expression of Interest is considered compliant to the requirements if:

- It fulfils the formal requirements (see Paragraphs 2,3,4,5,6, 7 and 8 above),
- The financial proposal (professional fees) does not exceed the maximum available budget for the contract as indicated under Para 3.
- The Bidder who submitted a technical and financial responsive proposal and received the highest combined score, will be awarded the contract

(iii) VALIDITY OF THE EXPRESSION OF INTEREST:

Your Expression of Interest should be valid for a period of **90 days** from the date of deadline for submission indicated in Paragraph 6 above.

9. The assignment is expected to commence within **two (2) weeks** from the signature of the contract.

10. Additional requests for information and clarifications can be made until 10 calendar days prior to deadline (i.e. **24th October 2021 at 16:30 hours Botswana time**) indicated in the paragraph 6 above, from:

The Procuring entity: **SADC Secretariat**

Contact person: Mr. Purpose Chifani

Telephone: **+267 364 1989 / 3951863**

Fax: **3972848**

E-mail: tenders@sadc.int and tchabwera@sadc.int

Copy to pchifani@sadc.int and djagai@sadc.int

The answer on the questions received will be sent to the Consultant and all questions received as well as the answer(s) to those will be posted on the SADC Secretariat's website at the latest 7 calendar days before the deadline for submission of the proposals i.e. **27th October 2021 at midnight**.

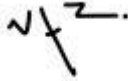
ANNEXES:

ANNEX 1: Terms of Reference

ANNEX 2: Expression of Interest Forms

ANNEX 3: Standard Contract for Individual Consultants

Sincerely,

A handwritten signature in black ink, appearing to be 'P. Chifani', written in a cursive style.

Purpose Chifani
Acting Head of Procurement Unit

ANNEX 1: TERMS OF REFERENCE



(Global Price)

**CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR
COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL
POVERTY INDEX (MPI) IN SADC REGION**

SADC/3/5/2/182

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1. BACKGROUND INFORMATION

1.1 Partner country and procuring entity

Southern African Development Community (SADC)

1.2 Contracting authority

Southern African Development Community Secretariat (SADC Secretariat)

1.3 Background

The Southern African Development Community (SADC) is a Regional Economic Community comprising 16 Member States, namely; Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe. Established in 1992, SADC is committed to Regional Integration and poverty eradication within Southern Africa through economic development and ensuring peace and security.

Article 14 of the SADC Treaty establishes the SADC Secretariat as the principal executive institution of SADC. The Secretariat performs its mandate and functions within the policy, strategic and programme provisions outlined in the Regional Indicative Strategic Development Plan (RISDP) and the Strategic Indicative Plan for the Organ (SIPO).

The Regional Infrastructure Development Master Plan (RIDMP), the SADC Regional Agricultural Policy (RAP), the Industrialisation Strategy and the Roadmap, among others, are complementary guiding frameworks for achieving the regional integration agenda. SADC has also developed various Protocols for domestication and implementation by Member States.

The Secretariat has considerably grown in the past few years, with more staff, higher budgets and increasing numbers of projects, which place a huge strain on the Secretariat systems that need to keep up with the pace of growth and expansion.

The Secretariat Project Portfolio has more than twenty (20) projects and programmes worth USD 170 million for the next five years. The Institutional Capacity Development Project (EU funded, 10th EDF) made some achievements of a change management nature, including development of policies, systems and procedures. However, there is a need to ensure more focused Executive-led change initiatives aimed at strengthening SADC Secretariat Organisational identity. This is to ensure that the organisation is operating as one entity with a common shared Vision; Mission and organisational Culture.

SADC Secretariat has recorded some remarkable achievements since its transformation. Progress has been made in the areas of Strategy Development/planning reform, Organisational structures to support the revised RISDP and Programme/Project Management.

1.4 Current situation in the Sector

Poverty eradication and improvement of the well-being of the people of the Southern African Development Community (SADC) region through regional integration and cooperation remain the ultimate goal for the region. The long-term objective of SADC is to reduce poverty in the region

through economic growth as well as peace, democracy and stability. Specific objectives of SADC pertaining to poverty as outlined in the Treaty establishing SADC in Article 5 are stated as follows:

- (i) To promote sustainable and equitable economic growth and socio-economic development that will ensure poverty alleviation with the ultimate objective of its eradication, enhance the standard and quality of life of the people of Southern Africa and support the socially disadvantaged through regional integration; and
- (ii) Ensure that poverty eradication is addressed in all SADC activities and programmes.

On the policy side, recognising that poverty remains the greatest challenge confronting the SADC region, a Consultative Conference on Poverty and Development for SADC Heads of State and Government was convened in Mauritius in 2008. The objective of the conference was to intensify dialogue on regional dimensions of poverty, strengthen collective efforts to address poverty through regional cooperation and integration and to continue dialogue on the partnerships necessary to accelerate the achievement of the Millennium Development Goals (MDGs). The main outcome of the conference was the signing of a Declaration on Poverty Eradication and Sustainable Development by the Heads of State and Government. Among others, the Heads of State and Government resolved to:

- (i) Achieve food security by setting up Task Force of Ministers of Trade, Agriculture and Finance to encourage regional collaboration and by sustainably improving the production capacity and productivity, facilitating cross border and internal food flows based on improved infrastructure and distribution networks;
- (ii) Promote financial sector development including micro finance and develop small and medium enterprises with emphasis on gender; and
- (iii) Strengthen partnerships with the private sector and civil society at large to mobilise financial and technical resources to combat poverty at its root

With regard to monitoring progress in poverty eradication initiatives, the Declaration further highlighted on the need to work towards the establishment of a Regional Poverty Observatory (RPO) to monitor progress made in the implementation of actions in the main priority areas of poverty eradication. It also noted the need to acquire and develop adequate capacity both at the Secretariat and Member States level to ensure effective implementation of poverty eradication programmes

On the statistical front, the Protocol on Statistics is conceived as a binding instrument that entrenches and gives legal effect to the statistical functions in the SADC region and legal mandate to the SADC Secretariat to co-ordinate and provide oversight to the implementation of SADC Regional Statistical System. The legal instrument explicitly places poverty statistics as one of the main intervention areas whereby Member States commit to use Multidimensional Poverty index (MPI) as the mechanism to measure poverty at national and regional level. Furthermore, the SADC Regional Strategy for Development of Statistics (RSDS) is an operational framework/instrument to roll out statistical functions for supporting regional integration priorities as embedded in the SADC Regional Indicative Strategic Development Plan (RISDP). One of the strategic focus areas of the RSDS is to increase comparability and quality of prioritised regional statistics through development of relevant manuals and methodological guidelines for production of harmonized statistics. These technical documents are aimed for subsequent trainings on the agreed frameworks and common statistical standards to enhance capacity at national level for production of harmonized and comparable statistics. The strategy identifies harmonization of poverty statistics as a core component to provide a firm basis for measuring and analysing disaggregated poverty levels in the region with the resulting effect of production and dissemination of poverty statistics on a sustainable basis.

On the governance side, the SADC Statistics Committee (SSC), comprising of SADC Heads of National Statistical Offices (NSOs), is responsible for providing policy, strategic and professional guidance for the statistical development and integration processes in the region. The Committee is a statutory meeting of SADC policy organs and reports to the SADC Council of Ministers following recommendations from technical meetings on statistical matters, usually comprising of statistical experts of Member States.

The SADC Statistics Committee (SSC), at its 25th Meeting in May 2018, directed Secretariat to undertake an assessment of current approaches used by individual Member States to measure poverty and inequality levels at national level and to produce a report highlighting those aspects. The report was expected to come up with strong recommendations on the way forward on next steps for building consensus with Member States in adoption of a common working definition for measurement of poverty in SADC. Through a consultancy and in collaboration with GiZ, Secretariat produced the assessment report that was validated by poverty statistics experts from Member States, continental/international organizations and specialized institutions involved in statistical methodological research in poverty statistics in 2020. The main recommendations from the workshop included

- (i) MPI as a common regional poverty methodological framework to produce national and regional poverty statistics; and
- (ii) SADC Secretariat to develop a harmonized methodological guideline for computation of national and regional MPI to measure poverty in the region as per the UNDP Manual on Handbook on How to Build a National MPI built with dimensions of health, education, standard of living and other dimensions.

It is within the above background that SADC Secretariat is looking forward to develop a harmonized methodological guidelines document for computation of national and regional MPIs to measure poverty in the region.

1.5 Related programmes and other donor activities

The development of harmonized poverty statistics guidelines is from data needs to monitor poverty in the region and there is currently no project or donor activities related to it.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall objective

The overall objective of this exercise is to harmonize poverty statistics in the region through development of practical manuals and guidelines intended for implementation at both national and regional level.

2.2 Specific Objectives (Purpose)

The specific objective of the assignment is to produce a practical methodological guideline document for assisting in computation and aggregation of disaggregated poverty statistics using MPI approach at both national and regional level. The guidelines are expected to act as resource base knowledge for implementation by poverty statistics experts and are also intended for undertaking of subsequent trainings in the region as part of sustainable capacity building.

2.3 Results to be achieved by the contractor

The consultant is expected to achieve the following results in the following chronological order:

- i. Inception report, detailing preliminary findings, methodology, a work plan, gaps identified, and remedial action to be taken to fill the gaps;
- ii. Draft Harmonized MPI Guidelines for poverty statistics, including:
 - Tool/questionnaire to capture national practices of Member States in compilation of relevant variables for building disaggregated harmonized MPIs;
 - Practical worksheet for computing and aggregating MPIs at national and regional level
- iii. Final Harmonized MPI Guidelines for poverty statistics, including:
 - Validation workshop report documenting inputs from Member States for amending in final report;
 - Consolidated status report on national practices in compilation of relevant variables for building disaggregated harmonized MPIs identifying gaps and best practices.

3. ASSUMPTIONS & RISKS

3.1 Assumptions underlying the project

It assumed that the consultant would be procured within the reasonable time-frame and implemented within the schedule provided of 90 calendar days spread over 3 months.

3.2 Risks

The nature of the assignment presents negligible risks associated with the consultancy. Some of the foreseen risks are the following:

Possible risks	Risk Level	Mitigation Measures
1. Unavailability of key stakeholders to provide relevant information due to change in the working environment as a result of COVID-19 effects	Medium	Plan and communicate ahead with key stakeholders; have more than one communication means
2. Delayed delivery of expected outputs due to COVID19	Medium	Monitor implementation and delivery of outputs every 15 days through Technical Meetings

4. SCOPE OF THE WORK

4.1 General

4.1.1 Project description and Specific work

This assignment firstly consists of briefly getting acquainted with relevant SADC policy documents related to poverty for the consultant to understand the processes involved in this sector and functioning. The development of the SADC poverty methodological guidelines should look at similar documents produced by continental, global level and specialized agencies involved in development of poverty indicators using MPIs. In addition, there should be specific consideration in emerging issues such as environment, climate change, disaster-risk and pandemic outbreaks that have direct bearing on poverty. The guidelines are preferred to be structured in the form of step-wise technical guidance notes (TGNs) for a poverty statistician to use as reference for planning and managing data collection, validation and dissemination of necessary variables involved in computation of poverty statistics using MPI. In doing so, the consultant is expected to earmark data sources, provide requirements in terms of statistical methodology for computation and aggregation of dimensions/variables through census, surveys and/or administrative data. The consultant is also expected to develop data transmission procedures and national/regional aggregation methodology through worksheets examples. Given the indicators essential for producing MPIs, the consultant is expected to develop a tool to capture national practices to take stock of the current situation at national level. The scope of activities finally involves an online regional validation workshop with national poverty statistics experts prior to finalization of the guidelines/document and subsequent submission to the SADC Statistics Committee (SSC) for consideration and approval.

4.1.2 Geographical area to be covered

The Harmonized Poverty Statistics Methodological Guidelines will be used by SADC Member States as part of the objective of capacitating Member States to achieve harmonization. SADC is a regional inter-governmental organisation comprising of 16 Southern African countries, headquartered in Gaborone, Botswana. The Community's sixteen-member countries are Angola, Botswana, Democratic Republic of Congo (DRC), Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Tanzania, Union of Comoros, Zambia and Zimbabwe.

4.1.3 Target groups

In developing the harmonized guidelines, the consultant will work closely with the SADC Secretariat Research and Statistics Unit, responsible for statistical matters in SADC. At Member States level, the task shall include engagement with national poverty statistics experts for information collection and a regional validation workshop virtually.

4.1.4 Specific Work

The assignment will be carried out primarily through a desk study and requires intellectual thinking. This will be complimented by appropriate research work and regular consultations with SADC Secretariat to obtain critical elements to be considered for incorporation in the development of the methodological guidelines as well to obtain clarification on pertinent issues.

In particular, the consultant will be required to:

1. Consult relevant SADC policy frameworks and governance framework, in particular the Vision 2050, RISDP, Protocol on Statistics and RSDS, to understand pertinent issues regarding poverty sector in SADC regional integration priorities.

2. Consult similar work undertaken at continental and global level.
3. Prepare specific practical methodological guidelines for planning, collection, validation, aggregation and dissemination of disaggregated MPIs at national level with practical examples. Data sources and corresponding data collection methodology need to be explicitly prescribed in addition to estimation techniques for non-response.
4. Provide aggregation methodology for disaggregated MPIs based on national harmonized MPIs and guidelines for regional analysis through a structured dissemination report.
5. Develop and administer a tool to capture Member States current practices (metadata) in compilation of relevant variables for building disaggregated harmonized MPIs.
6. Prepare a draft SADC Harmonized Poverty Methodological Guidelines using MPI of underlying considerations to the above points.
7. Present and validate the draft SADC Harmonized Poverty Methodological Guidelines using MPI to poverty statistics experts of Member States and SADC Secretariat as a resource person for input and discussion in a virtual validation workshop.
8. Prepare a validation workshop report documenting inputs/proposals of Member States and Secretariat and status of national practices in variables required to build MPIs.

Prepare a revised and final version of the SADC Harmonized Poverty Methodological Guidelines using MPI incorporating inputs from Secretariat and Member States for submission to the SADC Statistics Committee for consideration and approval.

4.2 Project management

4.2.1 Responsible body

Overall responsibility for supervision of the Consultancy will lie with the Project Manager, the Director PPRM assisted by the Senior Programme Officer – Research and Statistics. The Consultant shall be responsible for the operational day-to-day management and coordination of the consultancy work.

4.2.1 Management structure

The Consultant shall report to Director of the Policy Planning and Resource Mobilization Directorate and perform the assigned tasks under the guidance and direct supervision of the Senior Officer, Research and Statistics.

The consultant will continuously (via monthly reports/ email /zoom/ calls) update the Secretariat on progress and/or challenges with the drafting of the Regional Guideline.

4.2.3 Facilities to be provided by the contracting authority and/or other parties

SADC Secretariat, as the Contracting Authority will not facilitate office space for the consultant since the work will be performed virtually in light of the travel restrictions imposed by circumstances around the management of COVID-19. All resources required should be arranged as part of the consultancy cost.

5. LOGISTICS AND TIMING

5.1 Location

The assignment is commissioned by the SADC Secretariat based in Gaborone, Botswana. However, this Assignment will primarily be executed virtually in view of the COVID-19 Pandemic. Therefore, there will be no travelling to the SADC Secretariat offices in Gaborone, Botswana.

5.2 Start date & period of implementation

The intended start date is as soon as both parties have signed the contract agreement and the period of implementation of the contract will be 90 calendar days from the date of signing the agreement. Please see Article 3 of the specific contract for the actual start date and period of implementation.

6. REQUIREMENTS

6.1 Staff

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

6.1.1 Experts

Experts have a crucial role in implementing the contract. The contracting authority is indicating an absolute minimum input in terms of related qualifications and experience for the Consultant. The specific profile of the Key Expert is provided below:

Key Expert

Qualifications and Skills

- A minimum of a Master's degree in statistics, economics or related field.
- Must be computer literate, and competent in Word Processing and Spreadsheet Applications.
- Written and oral fluency in the English language is essential. Knowledge of French and/or Portuguese would be an asset.
- Excellent oral and written communication, analytical, presentation and report writing skills in English Language.
- Excellent time management and organizational skills to prioritize workload and meet tight deadlines.

General Professional Experience

- The Expert Must have at least ten (10) years of experience in similar assignment.

Specific Professional Experience

- At least 10 years of specific experience in undertaking and managing statistical functions in the area of poverty statistics, in particular development of MPIs;

- Demonstrated experience in the development and implementation of MPIs at regional/continental and global level;
- Experience in undertaking technical assistance in countries and development of methodological guidelines on MPIs as a resource person;
- Experience in working with leaders and officials in government, private sector organisations or aid agencies.

The expert must be independent and free from conflicts of interest in the responsibilities they take on.

6.1.2 Support staff & backstopping

Backstopping and support staff costs must be included in the price.

6.2 Office accommodation

None required.

6.3 Facilities to be provided by the contractor

No facilities will be provided since the assignment will be done remotely.

6.4 Equipment

No equipment is to be purchased on behalf of the contracting authority / procuring entity as part of this service contract or transferred to the contracting authority / procuring entity at the end of this contract. Any equipment related to this contract that is to be acquired by the procuring entity must be purchased by means of a separate supply tender procedure.

6.5 Incidental expenditure

Due to the COVID-19 Pandemic, it is expected that this assignment will be conducted virtually hence, the Incidental expenses will not be necessary.

6.6 Expenditure verification

Expenditure verification is not applicable in this contract.

7. REPORTS

7.1 Reporting requirements

There must be a final report and a final invoice the end of the period of implementation of the tasks. The draft final report must be submitted at least 15 days before the end of the period of implementation of the tasks.

Each report must consist of a narrative section and a financial section.

The Expert shall work with the Secretariat up to the end of the assignment, shall have delivered the following in electronic format within three (3) months:

Name of report	Content	Time of submission
Inception report	A final detailed inception report outlining the consultant's understanding of the assignment and the approach to be employed	No later than 7 days after the start of implementation
Draft Final Report	Draft SADC Harmonized Poverty Methodological Guidelines using MPI including tool to capture national practices in compilation of relevant variables for building disaggregated harmonized MPIs	6 weeks after submission of inception report
Final Report	Revised SADC Harmonized Poverty Methodological Guidelines using MPI incorporating inputs of NSOs of Member States and Secretariat, validation workshop report and consolidated status of Member States national practices in compilation of relevant variables used in MPIs	4 weeks after submission of draft Guidelines

Payments shall be related to reports and their approvals, as follows:

- a) 20% of the contract price shall be paid upon submission of an acceptable Inception report;
- b) 50% of the contract price shall be paid upon submission of an acceptable draft report.
- c) 30% of the contract price shall be paid upon submission of an acceptable final report and upon approval by the Management.

7.2 Submission & approval of reports

Two copies of the reports referred to above must be submitted to the project manager identified in the contract. The reports must be written in English. The project manager is responsible for approving the reports.

8. MONITORING AND EVALUATION

8.1 Definition of indicators

The expert/ consultant will be required to ensure that reporting is done against measurable indicators. These indicators should reflect the Consultant's commitment to delivering quality outputs in a timely manner. The final set of indicators should be provided in the inception report along with progress to be monitored. The Consultant will have to develop quantitative and qualitative parameters to assess achievement of the expected results over the period of the contract. Regular monitoring of progress of the results will be conducted to evaluate progress on each parameter.

Monitoring, Evaluation, Reporting shall be conducted in line with the latest version of the SADC Policy on Strategy Development, Planning, Monitoring, Evaluation and Reporting (SPMER Policy).

8.2 Special requirements

The Consultant must declare any potential conflict of interest between the provision of the requested services, and other activities in which, a member of their consortium or group (s), or any expert proposed in their offer is engaged.

9. BUDGET

The maximum available budget USD 12,000 and it covers all costs. Payments will be performance based (upon submission of deliverables).

* * *

ANNEX 2: Expression of Interest Forms

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- C. FINANCIAL PROPOSAL25

A. COVER LETTER FOR THE EXPRESSION OF INTEREST FOR THE PROJECT

REFERENCE NUMBER: SADC/3/5/2/182

CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION

Date: (insert date)

To: SADC Secretariat

Dear Sirs:

I, the undersigned, offer to provide the consulting services for the “SADC/3/5/2/182 - CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION” in accordance with your Request for Expression of Interests number SADC/3/5/2/182, dated 20th September 2021 for the sum of *(Insert Amount)* This amount is inclusive of all expenses deemed necessary for the performance of the contract in accordance with the Terms of Reference requirements, and *does* include any of the following taxes in Procuring Entity’s country: value added tax and social charges or/and income taxes on fees and benefits.

I hereby declare that all the information and statements made in my CV are true and accept that any misinterpretation contained in it may lead to my disqualification.

I take note that under the provisions of the SADC Procurement Policy applicable to this Request For Expression of Interest, a contract cannot be awarded to applicants who are in any of the following situations:

- a) *they are being bankrupt or wound up, are having their affairs administered by the courts, have entered into arrangements with creditors, have suspended business activities, are being subject of proceedings concerning those matters, or are being in any similar situations arising from a similar procedures provided for in the national legislation or regulations of the SADC member states;*
- b) *they have been convicted of offences concerning their professional conduct by a judgment which has the force of res judicata; (i.e. against which no appeal is possible);*
- c) *they have been declared guilty of grave professional misconduct proven by any means which SADC Secretariat can justify;*
- d) *they have not fulfilled obligations related to the payments of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those countries where the contract is to be performed;*
- e) *they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the SADC Secretariat' financial interests; or*
- f) *they are being currently subject to an administrative penalty.*

I confirm that I am not in any of the situations described above, and I hereby declare that at any point in time, at the SADC Secretariat’s request, I will provide certified copies of documents to prove so.

I am aware that the penalties set out in the Procurement Policy may be applied in the case of a false declaration, should the contract be awarded to me.

My proposal is binding upon me for the period indicated in Paragraph 9(iii) of this Request for Expression of Interest.

I undertake, if my Proposal is accepted, to initiate the consulting services related to the assignment not later than the date indicated in Paragraph 10 of the Request for Expression of Interest, and to be available for the entire duration of the contract as specified in the Terms of Reference.

I understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Signature [*In full and initials*]: _____

Name and Title of Signatory: _____

B. CURRICULUM VITAE
[insert full name]

- 1. Family name: *[insert the name]*
- 2. First names: *[insert the names in full]*
- 3. Date of birth: *[insert the date]*
- 4. Nationality: *[insert the country or countries of citizenship]*

- 5. Physical address: *[insert the physical address]*
- 6. Postal address
- 7. Phone: *[Insert Postal Address]*
- 8. E-mail: *[insert the phone and mobile no.]*
[Insert E-mail address(es)]

- 9. Education:

Institution: [Date from – Date to]	Degree(s) or Diploma(s) obtained:
<i>[indicate the month and the year]</i>	<i>[insert the name of the diploma and the specialty/major]</i>
<i>[indicate the month and the year]</i>	<i>[insert the name of the diploma and the specialty/major]</i>

10. Language skills: (Indicate competence on a scale of 1 to 5) (1 – excellent; 5 – basic)

Language	Reading	Speaking	Writing
<i>[insert the language]</i>	<i>[insert the no.]</i>	<i>[insert the no.]</i>	<i>[insert the no.]</i>
<i>[insert the no.]</i>	<i>[insert the no.]</i>	<i>[insert the no.]</i>	<i>[insert the no.]</i>

- 11. Membership of professional bodies: *[indicate the name of the professional body]*
- 12. Other skills: *[insert the skills]*
- 13. Present position: *[insert the name]*
- 14. Years of experience: *[insert the no.]*
- 15. Key qualifications: (Relevant to the assignment)
[insert the key qualifications]

16. Specific experience in the region:

Country	Date from - Date to
<i>[insert the country]</i>	<i>[indicate the month and the year]</i>
.....
<i>[insert the country]</i>	<i>[indicate the month and the year]</i>

17. Professional experience:

Date from – Date to	Location of the assignment	Company & reference person (name & contact details)	Position	Description
<i>[indicate the month and the year]</i>	<i>[indicate the country and the city]</i>	Name of the Company: Address of the company: Phone: Fax: Email: Name and title of the reference person from the company:	<i>[indicate the exact name and title and if it was a short term or a long term position]</i>	Name of the Assignment: Beneficiary of the Assignment: Brief description of the Assignment: Responsibilities:
<i>[indicate the month and the year]</i>	<i>[indicate the country and the city]</i>	Name of the Company: Address of the company: Phone: Fax: Email: Name and title of the reference person from the company:	<i>[indicate the exact name and title and if it was a short term or a long term position]</i>	Name of the Assignment: Beneficiary of the Assignment: Brief description of the Assignment: Responsibilities:
<i>[indicate the month and the year]</i>	<i>[indicate the country and the city]</i>	Name of the Company: Address of the company: Phone: Fax:	<i>[indicate the exact name and title and if it was a short term or a long</i>	Name of the Assignment: Beneficiary of the Assignment: Brief description of the Assignment: Responsibilities:

Date from – Date to	Location of the assignment	Company & reference person (name & contact details)	Position	Description
		<i>Email: Name and title of the reference person from the company:</i>	<i>term position]</i>	
.....
<i>[indicate the month and the year]</i>	<i>[indicate the country and the city]</i>	<i>Name of the Company: Address of the company: Phone: Fax: Email: Name and title of the reference person from the company:</i>	<i>[indicate the exact name and title and if it was a short term or a long term position]</i>	<i>Name of the Assignment: Beneficiary of the Assignment: Brief description of the Assignment: Responsibilities:</i>

18. Other relevant information: (e.g. Publications)

[insert the details]

19. Statement:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.

I hereby declare that at any point in time, at the SADC Secretariat's request, I will provide certified copies of all documents to prove that I have the qualifications and the professional experience as indicated in points 9 and 17 above¹, documents which are attached to this CV as photocopies.

By signing this statement, I also authorize the SADC Secretariat to contact my previous or current employers indicated at point 17 above, to obtain directly reference about my professional conduct and achievements.

_____ Date: _____

ATTACHMENTS: *1) Proof of qualifications indicated at point 9*
2) Proof of working experience indicated at point 17

¹ *The proof of stated qualifications shall be in the form of the copies of the degrees and diploma obtained, while for the professional experience the proof shall be either acknowledgement letters from the previous employers or copies of the Purchase Order/ Contract signed with them.*

C. FINANCIAL PROPOSAL

**CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR
COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL
POVERTY INDEX (MPI) IN SADC REGION**

REFERENCE NUMBER: SADC/3/5/2/182

N°	Description ¹	Unit ²	No. of Units	Unit Cost (in US\$)	Total (in US\$)
TOTAL FINANCIAL OFFER (Fees + Reimbursable expenses)					

Signature [*In full and initials*]: _____

Name and Title of Signatory: _____

¹ Delete items that are not applicable or add other items as the case may be.

² Indicate unit cost..

ANNEX 3: STANDARD CONTRACT FOR INDIVIDUAL CONSULTANTS

STANDARD TERMS OF CONTRACT

(Individual Consultant)

REFERENCE NUMBER: SADC/3/5/2/182 - CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION

THIS Contract (“Contract”) is made on *[day]* day of the month of *[month]*, *[year]*, between, on the one hand,

The SADC Secretariat (hereinafter called the “Procuring Entity”) with the registered business in: *Plot 54385 CBD, Private Bag 0095, Gaborone, Botswana*

and, on the other hand,

[Insert the full name of the individual] (Hereinafter called the “Individual Consultant”), with residence in *[insert the Individual Consultant’ address, phone, fax, email]*, citizen of *[insert the Individual Consultant’s citizenship]* owner of the ID/Passport Number *[insert the number]* issued on *[insert the date]* by *[insert the name of the issuance authority]*,

WHEREAS, the Procuring Entity wishes to have the Individual Consultant perform the services hereinafter referred to, and WHEREAS, the Individual Consultant is willing to perform these services,

NOW THEREFORE THE PARTIES hereby agree as follows:

1. Definitions

For the purpose of this contract the following definitions shall be used:

- 1.1 **Procuring Entity** means the legally entity, namely *the SADC Secretariat* who purchase the Services described in Annex 1 to this contract.
- 1.2 **Contract** means the agreement covered by these Terms including the Annexes and documents incorporated and/or referred to therein, and attachments thereto.

Contract value means the total price of the Financial Proposal included in the Individual Consultant’s Expression of Interests dated *[insert the date]* for the project **SADC/3/5/2/182 - CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION**

and reflected as such in the Annex 2 of this contract.

Individual Consultant means the individual to whom the Procuring Entity has awarded this contract following the Request for Expression of Interest **REFERENCE NUMBER: SADC/3/5/2/182: CONSULTANCY TO DEVELOP METHODOLOGICAL GUIDELINES FOR COMPUTATION OF POVERTY STATISTICS USING MULTIDIMENSIONAL POVERTY INDEX (MPI) IN SADC REGION**

1.3 **Services** means the Services to be performed by the Individual Consultant as more particularly described in Annex 1; for the avoidance of doubt, the Services to be performed include all obligations referred to in this Contract (as defined above).

2. The Services

The Individual Consultant will undertake the performance of the Services in accordance with the provisions of the Annex 1 of this Contract and shall, in the performance of the Services, exercise all the reasonable skill, care and diligence to be expected of an Individual Consultant carrying out such services.

3. Payment

3.1 The Individual Consultant shall be paid for the Services at the rates and upon the terms set out in Annex 2.

3.2 Payment shall be made to the Individual Consultant in US \$ unless otherwise provided by this contract and where applicable, VAT shall be payable on such sums at the applicable rate. The Individual Consultant must, in all cases, provide their VAT registration number on all invoices.

3.3 Unless otherwise provided in this Contract, invoices shall be delivered to and made out to Procuring Entity and shall be paid within 30 days of receipt by the Project Director, subject to the Individual Consultant having complied with his/her obligations hereunder in full as stated in the Annex II to this Contract. The Procuring Entity reserves the right to delay and/or withhold, fully or partially, payments that have not been supported by full and appropriate supporting evidence that the services provided were delivered and accepted by the Procuring Entity.

4. Status of the Individual Consultant

4.1 For the duration of the Contract, the Individual Consultant will have a status similar to the Procuring Entity's contractor with regards to their legal obligations, privileges and indemnities in the Procuring Entity's country.

4.2 The Procuring Entity will be responsible for ensuring all visas, work permits and other legal requirements to enable The Individual Consultant to live and work in the countries of the assignment as per the duties under the contract.

4.3 The Individual Consultant shall be responsible for paying any tax and social security contributions in his/her country of residence, for any activity deriving from this contract. Such costs shall be assumed included in the Individual Consultant's fees.

4.4 The Procuring Entity shall be responsible for paying any taxes resulting from the activities performed under this contract imposed to the Individual in the country(ies) of the assignment with the exception of the ones set out in paragraph 4.3 above.

5. Supervision of the Services

The Individual Consultant undertakes to deliver the Services in compliance with a system of quality assurance acceptable to the Procuring Entity which shall include any steps to comply with the standards operated by the Procuring Entity. The Individual Consultant shall be informed of the specific requirements in relation to this, and at the request of the Procuring Entity (s)he shall allow access to information, records and other materials during normal office working hours as the Procuring Entity may require in order to confirm that the work in progress is in accordance with these quality procedures.

6. Compliance with this contract

The Procuring Entity will be entitled to seek confirmation from the Individual Consultant, at any time during the delivery of this contract, and for a period of 1 year after its completion, that the Individual Consultant has complied with the terms of this contract. It may also request the provision of reasonable documentary evidence to support this. As stated in article 2.3 of this Contract, the Procuring Entity may delay or withhold payments in the event of non-compliance.

7. Assignment and Subcontracting

7.1 The Individual Consultant shall under no circumstances sub-contract, sublet, assign or transfer the Contract or any part share or interest in it. Where the Individual Consultant considers it necessary to use the services of a third party, (s)he shall inform the Procuring Entity's Project Director in writing, and only once written approval is provided can the Consultant proceed to use a third party.

7.2 When the Project Director agrees that the activities under the contract can be performed by a third party, the third party involved in the delivery of services in this contract, will be under the direct control of the Individual Consultant. The Procuring Entity will not be responsible for the third party's performance of duties or Services assigned to it, and neither for ensuring that conditions of employment are met nor for any other employment obligations relating to that person including, but not restricted to, taxation and insurance including professional indemnity insurance, employer's liability insurance and public liability insurance.

8. Breach of the Terms

In the event of a breach of any Terms of the Contract, the party not in breach may serve a notice on the party in breach requiring the breach to be remedied within a period specified in the notice, not normally being longer than 30 days.

If the breach has not been remedied before the expiry of the specified period, the party not in breach may then terminate the Contract in writing and may take appropriate steps to remedy the breach.

9. Liability of the Individual Consultant

9.1 The Procuring Entity will be relying on the Individual Consultant's skills, expertise and experience in relation to the performance of the Services in accordance with this contract and also upon the accuracy of all representations and statements made and the advice given in connection with the provision of the Services.

9.2 In view of the reliance by the Procuring Entity set out in 9.1 above, the Individual Consultant agrees to indemnify at its own expense, protect and defend the Procuring Entity, its agents and employees, from and against all actions, claims, losses or damages arising out of the Individual Consultant's performance of this contract provided that:

- a) the Individual Consultant is notified of such actions, claims, losses or damages not later than 30 days after the Procuring Entity becomes aware of them;
- b) the ceiling on the Individual Consultant's liability to the Procuring Entity shall be limited to an amount equal to the contract value but such ceiling shall not apply to any losses or damages caused to third parties by the Individual Consultant's willful misconduct; and
- c) the Individual Consultant's liability shall be limited to actions, claims, losses or damages directly caused by such failure to perform its obligations under the contract and shall not include liability arising from unforeseeable occurrences incidental or indirectly consequential to such failure.

9.3 At its own expense, the Individual Consultant shall, upon request of the Procuring Entity, remedy any defect in the performance of the services in the event of the Individual Consultant's failure to perform its obligations under the contract.

9.4 The Individual Consultant shall have no liability whatsoever for actions, claims, losses or damages occasioned by the Procuring Entity omitting to act on any recommendation, or overriding any act or decision of the Individual Consultant, or requiring the Individual Consultant to implement a decision or recommendation with which the Individual Consultant disagrees or on which (s)he expresses a serious reservation.

10. Insurance

10.1 The Individual Consultant must ensure that full and appropriate professional indemnity insurance and third party liability insurance, is in place for all Services provided.

10.2 The cost of such insurances will be covered from reimbursable expenses of the contract.

10.3 Where national requirements or practices provide for different regulations/practices concerning insurance, the Individual Consultant may

provide written confirmation of all insurances held and a signed declaration that these are in line with regulations/practices in their country of operation. Only if such confirmation has been provided, and written confirmation of its acceptance provided to the Individual Consultant by the Procuring Entity, will this remove the obligation to meet the requirements of clause 11.1 of this Contract in full.

- 10.4 All insurances effected by the Individual Consultant shall be effected with an insurer of good repute and the Individual Consultant agrees to maintain such insurances for a period of 1 year from the completion of the Services under this Contract so long as such insurance continues to be available upon reasonable terms at reasonable commercial rates failing which Procuring Entity shall be entitled to take out insurance itself to cover any potential liability to its own Procuring Entity in relation to the performance of the Services under this contract. The cost of such insurance shall be a debt immediately due from the Individual Consultant.
- 10.5 The provisions of this clause shall remain in full force and effect notwithstanding the completion of the performance of the Services hereunder and the satisfaction of all other provisions of this contract.

11. Copyright

- 11.1 Unless otherwise specified in the Contract, the title of the copyright and any other intellectual property rights arising out of the performance of this Contract shall be vested in the Procuring Entity which shall have the unfettered right to assign and grant sub-licenses in respect of the same. Except as permitted by the Terms of this Contract, the said materials shall not be reproduced or disseminated without proper consultation with, and written permission from, the Procuring Entity. This provision shall apply to the title to rights arising from the performance under this contract but shall not apply to the internal systems or rights in relation to the Individual Consultant's own systems not created specifically for this purpose and where the same are an important part of the Services. The Individual Consultant shall grant a free and irrevocable license to the Procuring Entity and its assigns for the use of the same in that connection.

The Individual Consultant warrants that it is free of any duties or obligations to third parties which may conflict with this contract and, without prejudice to the generality of Term 9 above, agrees to indemnify the Procuring Entity against any and all actions, costs damages, direct, indirect or consequential, and other expenses of any nature whatsoever which the Procuring Entity may incur or suffer as a result of the breach by the Individual Consultant of this warranty.

12. Non-Disclosure & Confidentiality

- 12.1 The Individual Consultant will treat all information and results obtained in discharging the Services under this Contract as confidential and will not disclose by any means whatsoever such results or material to any third party without the prior written consent of the Procuring Entity and will only use such information for the purposes of this Contract. In addition, the Individual Consultant shall not make any communication to the press or any broadcast

(including, but not limited to, inclusion of information on a website) about the Services without the prior written agreement of the Project Director.

- 12.2 If the Individual Consultant violates clause 12.1, then (s)he will automatically and legally be held to pay the amount estimated as the minimum reasonable damages resulting from a breach of confidentiality. This is without prejudice to the right of the Procuring Entity to demonstrate that a higher amount of loss has or may be incurred as a result of liabilities held by the Consultant in relation to the Procuring Entity.

13. Suspension or Termination

- 13.1 In response to any factors out of the control of Procuring Entity and/or to breaches of contract by the Consultant, the Procuring Entity may at any time, by giving 30 days' notice in writing, terminate in whole or in part or suspend the Individual Consultant's performance of the Services. In such event, the Individual Consultant shall be entitled to payment pursuant to sub-clause 13.4 below. If such suspension continues for a period in excess of twelve months, then either party may terminate this contract forthwith by written notice to the other.
- 13.2 The Individual Consultant may also terminate the contract unilaterally, without providing any reasons for such decision, if (s) he gives a 30 days prior written notice to the Project Director.
- 13.3 In the event of early termination of the Contract under sub-clauses 13.1, 13.2 and 13.3 of this clause, the Individual Consultant shall be entitled to a fair and reasonable proportion of the fees payable for that part of the Services carried out up to the date of such termination or suspension but this shall not include any loss of profit or contracts or any other expenses, losses or claims arising out of such termination or suspension or consequential thereupon.

14. No Waiver

No forbearance shown or granted to the Individual Consultant, unless in writing by an authorized officer of the Procuring Entity, shall in any way affect or prejudice the rights of the Procuring Entity or be taken as a waiver of any of these Terms.

15. Variations

Any variation to these terms or the provisions of the Annexes shall be subject to a written Addendum and be signed by duly authorized signatories on behalf of the Individual Consultant and the Procuring Entity respectively.

16. Jurisdiction

This contract shall be governed by, and shall be construed in accordance with Botswana law and each party agrees to submit to the exclusive jurisdiction of the Botswana courts in regard to any claim or matter arising under this contract.

The following Annexes are integral part of this Contract:

Annex 1: Payment Schedule and Requirements

Signed today *[insert the date]* in four (4) originals in the English language by:

For the Procuring Entity		For the Individual Consultant	
Name :		Name :	
Position :			
Place :		Place :	
Date:		Date :	
Signature:		Signature:	

Annex 2: Payment Schedule and Requirements

1. For Services rendered pursuant to Annex 1, the Procuring Entity shall pay the Individual Consultant an amount not to exceed the ceiling of US Dollars *[insert ceiling amount]*, which shall be considered the contract value. This amount has been established based on the understanding that it includes all of the Consultant’s costs and profits as well as any tax obligation that may be imposed on the Individual Consultant in his/her country of residence.

2. The breakdown of prices is:

N o	Description ¹	Unit	No. of Units	Unit Cost (in US\$)	Total (in US\$)
TOTAL FINANCIAL OFFER (Fees + Reimbursable expenses)					

3. The payment shall be made in accordance with the agreed schedule in line with the deliverables as follows:

Payments shall be related to reports and their approvals, as follows:

- a) 20% of the contract price shall be paid upon submission of an acceptable Inception report;
- b) 50% of the contract price shall be paid upon submission of an acceptable draft report.
- c) 30% of the contract price shall be paid upon submission of an acceptable final report and upon approval by the Management.

4. Payment Conditions: Payment shall be made in US Dollars not later than 30 days following submission of original invoice by the Individual Consultant, in duplicate, accompanied by the requested supporting documents. All payments under the contract shall be made by bank transfer into the bank account indicated by the Individual Consultant in her/his invoices.

¹ Delete items that are not applicable or add other items as the case may be.