

TERMS OF REFERENCE



CONSULTANCY TO DEVELOP SADC METHODOLOGICAL GUIDELINES AND HARMONISED DATA COLLECTION INSTRUMENTS FOR DISAGGREGATED TRADE IN SERVICES STATISTICS IN SADC REGION

[Handwritten signature]

Table of Contents

1. BACKGROUND INFORMATION	3
1.1 Background	3
1.2 Current situation in the sector	4
2. OBJECTIVES OF THE ASSIGNMENT AND EXPECTED RESULTS	5
2.1 Overall objective	5
2.2 Specific objectives.....	6
2.3 Expected results	6
3. SCOPE OF WORK.....	6
3.1 Scope of work	6
3.2 Geographical area to be covered	7
3.3 Target groups.....	7
3.4 Specific work.....	7
4. QUALIFICATION AND EXPERIENCE REQUIREMENTS	8
5. REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES	9
5.1 Reporting requirements.....	9
5.2 Submission and approval of report.....	9
5.3 Project management.....	9
5.4 Management structure.....	9
6. LOGISTICS AND START DATE	10
6.1 Location	10
6.2 Office accommodation.....	10
6.3 Facilities to be provided by the contracting authority.....	10
6.4 Facilities to be provided by the contractor	10
6.5 Equipment	10
6.6 Start date and period of implementation.....	10
7. MONITORING AND EVALUATION.....	10
7.1 Definition of indicators	10
7.2 Special requirements	10
8. ASSUMPTIONS AND RISKS	10
8.1 Assumptions underlying the project	10
8.2 Risks.....	11



1. BACKGROUND INFORMATION

1.1 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, 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).

The SADC Vision 2050 and its first 10-year implementation plan, the Regional Indicative Strategy Development Plan (RISDP, 2020 - 30), originates from an outcome of a comprehensive consultative process and marks another milestone in efforts to foster regional cooperation and integration. SADC has also developed various Protocols for domestication and implementation by Member States including the most recent one, the Protocol on Statistics to enhance cooperation of statistics in quest of harmonization of statistics. Development and implementation of regional statistical programmes are guided mainly by the Protocol on Statistics and the Regional Strategy for Development of Statistics (RSDS) aligned to developing and enhancing statistics for regional integration priorities.

Demand for quality and harmonized statistics has been on the rise to monitor progress in developmental agendas at national, regional, continental, and global level. The scope of data demand cuts across economic, social, and also on emerging issues such as climate change, disaster-risk, environment and others related. The implementation of statistical programmes requires significant funding on a sustainable basis. Within this context, the support of development partners and donor institutions becomes a central element in the process. The services sector in the SADC region is characterised by moderate investment, comparatively high cost and limited access to services by the public. At the same time, international trade in services is becoming an increasingly integral part of Southern African economies and are also important inputs to production in all sectors. Statistics of international trade in services (SITS) are primarily used to measure performance of Pillar I of RISDP programmes on industrial development and market integration, especially to increase intra-SADC trade in services in the region. With the rising importance of services and in particular trade in services, for economies and societies within the SADC region and around the world, policy makers, trade negotiators and economists require better data availability, enhanced quality, and improved harmonised regional and international statistics for comparability.



1.2 Current situation in the sector

The SADC Vision 2050 earmarks Statistics a priority cross-cutting sector whereby by 2050, the region strategic objective in statistics is to realize a robust and responsive regional statistical system to underpin regional integration processes, including measurement of progress and impact. The SADC RISDP 2020-30 draws impetus from the Vision 2050 and thereby identify key intervention areas to achieve the expected outcome of enhanced statistical infrastructure, systems, and capacity across the region for production and effective use of harmonized regional statistics. The key intervention areas include primarily the development and implementation of policy and legal frameworks for coordinating regional statistics and capacity across the entire data value chain of the regional statistical system strengthened.

The Regional Strategy for Development of Statistics (RSDS) 2020-30 is complementary sectoral strategy for achieving regional integration as embedded in RISDP 2020-30, for statistics sector. In line with the strategic objective, expected outcome, implementation plan and strategic outputs of Statistics as embedded in RISDP 2020-30, the 6 identified strategic intervention areas of RSDS 2020-30 priorities for implementation are as follows:

- (i) Policy frameworks for development of regional statistics;
- (ii) Institutional strengthening and sustainability of the SADC Regional Statistical System;
- (iii) Harmonization of regional statistics;
- (iv) Digital transformation of regional statistics;
- (v) Capacity for data production, management, dissemination and use; and
- (vi) Quality of regional statistics.

In addition to the policy frameworks related to statistical matters in the region, a legal framework in the form of the Protocol on Statistics has been developed and approved to enhance the level of statistical development both nationally and regionally, facilitating the pursuit of monitoring and measuring progress of development agendas at national, regional, continental, and global level. The Protocol is conceived as a binding instrument that will entrench and give legal effect to the statistical functions in the SADC region and is expected to give legal mandate to the SADC Secretariat to co-ordinate and provide oversight to the implementation of SADC Regional Statistical System.

At statutory level, the SADC Statistics Committee, comprising of Head of Statistics in the SADC Member States provides policy, strategic and professional guidance for the statistical development and integration processes in the region. The Committee meets at least once a year and monitor progress in the SADC Statistics Program and oversee the implementation of statistical development. The Statistics Unit of Secretariat primary function is to co-ordinate and rationalize all regional statistical activities in line with continental and international statistical frameworks and provides technical and secretarial support to the Statistics Committee. The Committee reports directly to the SADC Council of Ministers.



The SADC Protocol of Trade in Services was signed by Head of State in August 2012 and entered into force in January 2022. It provides a framework for preferential trade agreement covering all commercial and tradable services in any services sector and aims to encourage increased intra-regional trade in services through the gradual removal of unnecessary or overburdensome regulation affecting the cross-border supply of services within the SADC region.

On the statistical front, the Protocol on Statistics explicitly places trade statistics in particular trade in services as one of the key intervention areas whereby Member States commit to set up and strengthen cooperation in their National Statistical System (NSS) for coordination of trade in services data production and dissemination and implement recommendations of the UN Manual on Statistics of International Trade in Services to produce annual flows of trade in services, inward foreign affiliates and outward foreign affiliates by partner country to measure progress in implementation of trade in services policies in the region.

Secretariat developed the methodology for SADC trade in services statistics templates in 2014 and consisted of the following sections:

- (i) Balance of payments trade in services statistics by partner country;
- (ii) Inward foreign affiliates statistics by partner country; and
- (iii) Outward foreign affiliates statistics by partner country

The templates provided clear guidance on a common data set that countries can report to SADC and Secretariat conducted national training in some Member States on the templates in 2014. The SADC Statistics Committee (SSC), at its 23rd Meeting in June 2016, endorsed and adopted the common data collection template for use by Member States in collection and compilation of harmonized trade in services data and statistics respectively for use in negotiations in trade in services.

Within this background and to continue the progress made in this area, Secretariat has planned an activity to develop a practical methodological guideline and harmonised data collection instruments to capture disaggregated trade in services statistics in SADC region. The guidelines are expected to strengthen the capacity of Member States national statistics systems to produce and disseminate disaggregated harmonized statistics on SADC Trade in Services in accordance with international and regional recommendations.

2. OBJECTIVES OF THE ASSIGNMENT AND EXPECTED RESULTS

2.1 Overall objective

The overall objective of this exercise is to develop a SADC Trade in Services practical methodological guidelines and harmonised data collection instruments to collect detailed trade statistics mainly by partner country to measure extent of trade liberalisation in the service sector within the SADC region and outside the region.



2.2 Specific objectives

The specific objective of the assignment is to produce a practical methodological guideline document for assisting in planning, data collection, data processing, computation, analysis, and dissemination of SADC trade in services by partner country at both national and regional level in accordance with the latest international manual and standards on trade in services. The guidelines are expected to provide harmonised data collection instruments using survey and administrative data. The guidelines shall also support the process of methodological improvement in increasing the scope of inflows and outflows statistics by source/destination (intra/extra SADC, industry, and type of investment) and mode of supply. In addition, they are also intended to be applied or used as a tool for undertaking subsequent methodological reviews and training in the region as part of sustainable capacity building.

2.3 Expected results

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

- (i) Inception report, detailing preliminary findings, approach/methodology for the task, a work plan, gaps identified, and remedial action to be taken to fill the gaps. The structure of the Guidelines document in terms of a draft table of content should also be provided at this stage;
- (ii) Draft SADC Trade in Services practical methodological guidelines and harmonised data collection instruments, including scope of work as stated at Section 3 in this TOR and agreed issues in inception report; and
- (iii) Final version of SADC Trade in Services practical methodological guidelines and harmonised data collection instruments, including Validation workshop report documenting inputs from Member States and Secretariat for amending in final report.

3. SCOPE OF WORK

3.1 Scope of work

This assignment firstly consists of briefly getting acquainted with relevant SADC policy documents related to statistics for the consultant to understand the processes involved in this sector and functioning. The development of the SADC Trade in Services practical methodological guidelines and harmonised data collection instruments should look at similar documents produced by continental, global level and specialized agencies involved in the area. The guidelines are preferred to be structured in the form of step-wise technical guidance notes (TGNs) for a trade in services expert to use as reference for planning and managing data collection, validation and dissemination of necessary variables involved in computation of disaggregated trade in services statistics and subsequently used to produce SADC Trade in Services by partner country. The guidelines should be in accordance with the latest international manual and standards on trade in services. In doing so, the consultant is expected to earmark data sources, provide requirements in terms of statistical methodology for computation

and aggregation of variables for this assignment. The scope of activities finally involves an online regional validation workshop with NSOs, trade in services experts, and Secretariat prior to finalization of the guidelines and subsequent submission to the SADC Statistics Committee for consideration and approval.

3.2 Geographical area to be covered

The SADC Trade in Services practical methodological guidelines and harmonised data collection instruments will be used by SADC Member States.

3.3 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 statisticians and trade in services experts for information collection and an online regional validation workshop.

3.4 Specific work

The assignment will be carried out primarily through a desk study. 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:

- (i) Consult relevant SADC policy frameworks and governance frameworks, in particular the Vision 2050, RISDP, Protocol on Statistics, Protocol on Trade in Services and RSDS, to understand pertinent issues regarding trade in services in SADC regional integration priorities.
- (ii) Consult similar work undertaken at continental, global level and specialized agencies involved in the area.
- (iii) Conduct a situational assessment of trade in services statistics produced by all SADC Member States.
- (iv) Prepare specific practical methodological guidelines for planning, collection, validation, aggregation, and dissemination of disaggregated SADC trade in services statistics at national level with practical examples based on survey and administrative data. Estimation techniques for non-response should be explicit.
- (v) Prepare a draft SADC Trade in Services practical methodological guidelines and harmonised data collection instruments underlying considerations to the above points.
- (vi) Present and validate the draft Trade in Services practical methodological guidelines and harmonised data collection instruments to statisticians and trade in services experts of Member States and SADC Secretariat as a resource person for input and discussion in a virtual validation workshop.
- (vii) Prepare a validation workshop report documenting inputs/proposals of Member States and Secretariat.



- (viii) Prepare a revised and final version of the SADC Trade in Services practical methodological guidelines and harmonised data collection instruments incorporating inputs from Secretariat and Member States for submission to the SADC Statistics Committee for consideration and approval.

4. QUALIFICATION AND EXPERIENCE REQUIREMENTS

This assignment is expected to be carried out by a consultant with in-depth knowledge in trade in services statistics. The specific profile is provided below:

Qualifications and Skills

- A minimum of a Degree in statistics, economics or related field. A Masters degree and above shall be an advantage.
- Written and oral fluency in the English language is essential. Knowledge of French and 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 deliver needful during the training week.

General Professional Experience

- The Consultant must have at least 15 years of specific experience in undertaking and managing statistical functions in the area of statistics, in particular on external sector statistics.

Specific Professional Experience

- At least ten (10) years' experience in collection, production, and dissemination of SITS at national/international level.
- Experience in the conduct of foreign affiliates surveys and practical experience on using the Manual on Statistics of International Trade in Services 2010 (MSITS 2010), Balance of Payments Manuals up to version 6 (BPM 6) and Extended Balance of Payments Services Classification (EBOPS);
- Demonstrated experience in the development of SITS guidelines and tools at national/international level;
- Experience in undertaking at least one (1) technical assistance/capacity building in the area of SITS in developing countries, preferably in Africa, as a resource person.

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

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organizations 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.



5. REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES

5.1 Reporting requirements

The consultant shall operate under the guidance of the Senior Officer – Research & Statistics and direct supervision of Officer – Research and Statistics responsible of trade in services statistics.

All the deliverables shall be delivered to the Officer – Research and Statistics who shall assess and review the deliverables in line with the requirement of the Term of the References; and approved by 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. All reports shall be in electronic format in MS Word. 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 Trade in Services practical methodological guidelines and harmonised data collection instruments.	8 weeks after submission of inception report
Final Report	Revised SADC Trade in Services practical methodological guidelines and harmonised data collection instruments, and Regional Validation Report.	3 weeks after submission of draft guidelines.

5.2 Submission and approval of report

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.

5.3 Project management

Overall responsibility for supervision of the Consultancy will lie with the Officer – Research and Statistics. The Consultant shall be responsible for the operational day-to-day management and coordination of the consultancy work.

5.4 Management structure

The Consultant shall report to the Officer – Research and Statistics and perform the assigned tasks.

6. LOGISTICS AND START DATE

6.1 Location

The assignment is commissioned by the SADC Secretariat based in Gaborone, Botswana. However, this Assignment will primarily be executed through desk research and virtually. Therefore, there will be no travelling to the SADC Secretariat offices in Gaborone, Botswana.

6.2 Office accommodation

None required

6.3 Facilities to be provided by the contracting authority

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

6.4 Facilities to be provided by the contractor

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

6.5 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.

6.6 Start date and 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.

7. MONITORING AND EVALUATION

7.1 Definition of indicators

The indicators to be used are timeliness, technical coverage and analytical quality of the Report as detailed in the section 5 above.

7.2 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 of group (s), or any expert proposed in their offer is engaged.

8. ASSUMPTIONS AND RISKS

8.1 Assumptions underlying the project



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

8.2 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	Medium	Plan and communicate ahead with key stakeholders; have more than one communication means

9. FINANCIAL PROPOSAL

9.1 Financial proposal

The financial proposal should include all consultancy fees and all costs.

9.2 Schedule of payment

Payments for the assignment shall be related to the reports and their approval as follows:

20% of the contract price shall be paid upon submission of an acceptable Inception report;

60% of the contract price shall be paid upon submission of an acceptable draft report.

40% of the contract price shall be paid upon submission of an acceptable final report and regional validation report.

