

TERMS OF REFERENCE



INDIVIDUAL CONSULTANCY TO DEVELOP THE NATIONAL STRATEGY FOR DEVELOPMENT OF STATISTICS (NSDS) OF SOUTH AFRICA

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 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 including the most recent one, the Protocol on Statistics, to enhance harmonization of statistics. The operating framework for implementing statistical activities as priorities for the region is the Regional Strategy for Development of Statistics (RSDS) and is aligned to SADC Vision 2050 and RISDP 2020-30.

1.2 Current situation in the Sector

REGIONAL LEVEL

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. Article 4 of the Protocol on Statistics states that Member States shall design and update their NSDS in line with their national development programmes to address the data needs responsive to new challenges and aligned to the goals at regional, continental and global levels.

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.

Secretariat is prioritizing statistical capacity building as part of its implementation plan guided by the RSDS 2020-30 and through the Regional Statistics Project, funded by the World Bank Group with the project development objective of enhancing institutional capacity of the regional statistical system of the region while increasing regional harmonization and collaboration. The scope of support to be delivered by SADC Secretariat to Member States also include reviewing and drafting of policy instruments guiding national statistical activities such as the National Strategy for Development of Statistics (NSDS) as part of implementation of Article 4 of the Protocol on Statistics and the first strategic intervention area of the SADC RSDS. Within this background, Statistics South Africa (StatsSA) requested support to Secretariat for the development of its first NSDS.

NATIONAL LEVEL

In line with legislative frameworks in South Africa, Stats SA has compiled 5-year strategic plans since early 2000. Annually, a Work Programme is compiled outlining the key performance indicators and targets. The latest 5-year strategic plan (2025/26 – 2029/2030) has been approved by the Minister responsible for Stats SA and tabled in Parliament in May 2025. These strategic plans primarily addressed the strategic direction of Stats SA, emphasizing the national statistics system (NSS) and the organisation's strategic intent, rather than outlining a national strategy for the NSS.

Recently approved amendments to the Statistics Act (No. 29 of 2024) now provide a policy directive for Stats SA to coordinate and compile a National Strategy for the Development of Statistics (NSDS) for South Africa.

The NSDS serves as a comprehensive blueprint outlining the objectives, priorities, and actions necessary to strengthen the national statistical system. Its primary aim is to improve the quality, relevance, timeliness, and accessibility of statistical information to support evidence-based decision-making, policy development, and the monitoring of development goals.

Various government institutions and other data producers within the NSS contribute to meeting the growing demand for statistical data. A coordinated and integrated strategy, such as the NSDS, is essential to address existing gaps in disaggregated data, which are critical for fulfilling national, continental, and international reporting obligations. Strengthening the NSS and implementing the NSDS are therefore imperative.

In the absence of a finalized NSDS, Statistics South Africa (Stats SA) has developed several coordination instruments to support its implementation. These include:

1. South African Statistical Quality Assessment Framework (SASQAF) – Establishes criteria for designating statistical products as official statistics.
2. Integrated Indicator Framework (IIF) – Defines the demand for statistical information to support informed policy and decision-making.
3. ICT tools and operational procedures – Facilitate efficient coordination in data access, technical support, quality assessment, and statistical reporting.

To address systemic challenges, Stats SA has adopted a sectoral approach in developing the NSDS. This involved extensive stakeholder engagement across various sectors, grouped in four broad sectors, to gather input and understand sector-specific data needs and expectations. This inclusive process highlighted key challenges such as data gaps, quality issues, and capacity constraints.

1. Environment Sector

In 2023, South Africa hosted the IMF Statistics Department, supported by the Swiss State Secretariat for Economic Affairs (SECO), under the “Environmental and Climate Change Statistics Capacity Development Program.” This initiative aimed to support the development of timely and internationally comparable environmental statistics. Participating NSS partners included: Department of Forestry, Fisheries, and Environment (DFFE), Department of Mineral Resources and Energy (DMRE), Department of Planning, Monitoring, and Evaluation (DPME), Department of Water & Sanitation (DWS), Department of Science and Innovation (DSI), National Business Initiative (NBI), National Treasury (NT), South African National Parks (SANParks), Water research commission (WRC), South African Reserve Bank (SARB), South African Revenue Services (SARS), South African Weather Services (SAWS), South African National Energy Development Institute (SANEDI), and South African National Biodiversity Institute (SANBI).

2. Social Sector

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In 2024, under the Pan-African Statistics Programme II (PAS II), Stats SA collaborated with Statistics Denmark to enhance social statistics through the SOCSTAF initiative. The program emphasized the use of administrative data and microdata integration to improve statistical outputs. The use of alternative data sources and data integration is perceived as an opportunity to closing data gaps that currently prevail in the NSS, and as an enabler to an integrated national statistical reporting system. Some of the take-aways identified during the discussions was that when developing the NSDS, the use of administrative data and the digitalisation of the public sector registers are critical elements for consideration that ought to form part of the overall strategy.

NSS partners that formed part of this engagements and capacity building project included Department of Basic Education (DBE), Department of Higher Education and Training (DHET), Department of Social Development (DSD) and Department of Home Affairs (DHA).

3. Economics Sector

During the 2023/24 financial year, Stats SA, in collaboration with National Treasury, hosted a workshop focused on using administrative, taxation, and spatial data to inform local economic policy. The event promoted intra-governmental collaboration and the establishment of a community of practice around an integrated data lake. Over 150 delegates shared insights on best practices and the benefits of coordinated data systems. The integrated data lake was identified as a critical component of the NSDS. Participating entities included: South African Local Government Association (SALGA), South African Cities Network (SACN), United Nations University World Institute for Development Economics Research (UNU-WIDER), Spatial Economic Activity Data-South Africa (SEAD-SA), South African Revenue Service (SARS), UK's Foreign, Commonwealth and Development Office, UK's Office for National Statistics (UK-ONS), Human Sciences Research Council (HSRC), National Treasury (NT), University of the Free State (UFS) and representatives from all government departments.

4. Governance, Peace, Justice and Security Sector

Consultation for the Governance, Peace, Justice, and Security sector was conducted in collaboration with stakeholders within the Social Statistics domain. The primary objective was to evaluate stakeholder satisfaction with the current indicators presented in the IIF, with particular emphasis on SDG 16 and the thematic areas covered by the Governance, Public Safety and Justice Survey (GPSJS). Additionally, the consultation aimed to identify existing data gaps, explore potential data sources, and assess emerging data needs that may warrant inclusion in both the Stats SA surveys, like the GPSJS and the IIF.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall objective

The overall objective of this consultancy is to support National Statistical offices (NSOs) on strategic and policy aspects pertaining to Official Statistics to strengthen governance and provide strategic direction ensuring fulfillment of its mandate in the development process at national and international level.

2.2 Specific Objectives (Purpose)

- The specific objective of this consultancy is to develop a draft NSDS for South Africa as a guiding policy framework for coordination and implementation of statistics in support of national priorities and responsive to regional, continental and global agendas. The NSDS also needs to cater for specific issues such as: advocacy, communication, gender mainstreaming, cybersecurity, results-based framework, innovative data sources and others relevant. The NSDS should include, among other aspects, identification of data production, dissemination, and usage gaps; priority sectors (such as agriculture, labour, education, environment); a long-term vision for statistical development; a list of key outputs (like censuses, surveys, administrative data); and strategic objectives aligned with national, regional, and global commitments (e.g., SDGs, RISDP, SHaSA).

2.3 Results to be achieved by the contractor

The consultant is expected to achieve the following results in the following as part of drafting the NSDS:

- i. Assessment and review of the existing policy and strategic frameworks identifying gaps and challenges amongst others with a defined and well-structured stakeholders engagement plan;
- ii. Identification of specific and impactful recommendations with justification for implementation towards drafting of the NSDS and its strategic focus areas and discussion within the governance structure for consideration; and
- iii. Detailed explanation of the strategic focus areas with a results-based monitoring & evaluation framework aligned to national and international priorities/commitments.

3. ASSUMPTIONS & RISKS

3.1 Scope of Work

Strategy review and analysis: Review of the existing policy frameworks

- (i) Review documentation and engage key stakeholders to establish whether the process undertaken effectiveness in undertaking priority issues;
- (ii) Review the implementation structure and assess the extent to which local ownership was embedded;
- (iii) Undertake an analytical assessment following the criteria: relevance, efficiency, effectiveness, sustainability and impact of the activities undertaken including a detailed analysis of achievements against targets;
- (iv) Identify the strengths, weaknesses, opportunities, threats and constraints of implementation;

- (v) Draw lessons in order to recommend improvements and key strategic focus areas in the development and implementation of the NSDS;
- (vi) Validate the results of the evaluation by StatsSA and key stakeholders involved in the current activities.

Strategy formulation: Design of draft NSDS

- (i) Capture key priority needs at national, regional, continental and global level in areas of strategic importance;
- (ii) Review the baseline data, situational analysis and define the criteria that will be used to select the priority strategic focus areas;
- (iii) Develop key objectives and targets for the priority areas over the strategy period;
- (iv) Define institutional framework to coordinate strategy implementation and supporting funding mechanism with indicative costs;
- (v) Developing a results-based monitoring and evaluation framework with SMART indicators to monitor the strategy and identify risks;
- (vi) Validate the draft NSDS with StatsSA and relevant stakeholders concerned.

3.2 Geographical area to be covered

The assignment is specific to South Africa.

3.3 Target groups

This consultancy is expected to target the National Statistics Office of South Africa (Stats SA) as the lead focal point for engagement and would also require relevant stakeholders as identified by Stats SA.

3.4 Specific Work

The assignment will be carried out primarily through engagement and discussions with Stats SA and the Statistics Unit of SADC Secretariat.

In particular, the consultant will be required to:

1. Produce an Inception Report detailing the approach, assumptions, risk, plans, stakeholders engagement plan and others relevant towards undertaking the assignment;
2. Engage with all necessary stakeholders of Stats SA for the review of the current situation of the existing strategic frameworks and drafting of NSDS in line with national, regional, continental and international frameworks.

3. Use appropriate tools or methodology for undertaking review/assessment segment and to be agreed by both Stats SA and SADC Secretariat.
4. Validate the review/assessment document with Stats SA, SADC Secretariat and all stakeholders' institutions as deemed essential by Stats SA.
5. Take stock of all statistical developments as endorsed by UN Statistical Commission, AUC Committee of Directors of Statistics (CoDG) and SADC Statistics Committee for integration in the NSDS.
6. Take stock of international statistical developments by other National Statistics Offices (NSOs)>
7. Draft the NSDS with key strategic focus areas of implementation with a results-based monitoring & evaluation framework and aligned to national, regional, continental and global statistical needs.
8. Validate the NSDS with Stats SA, SADC Secretariat and all stakeholders institutions as deemed essential by Stats SA.

4. QUALIFICATIONS AND EXPERIENCE

This assignment is expected to be carried out by an individual consultant expert and should be an expert in strategic and policy formulation in Official 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 Ph.D. in the same field shall be an added advantage.
- A certificate in results-based monitoring & evaluation is desirable.
- Written and oral fluency in English language is essential.
- 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 Expert Must have at least ten (20) years of experience in statistical coordination of statistical systems at the highest level.

Specific Professional Experience

- At least 12 years of experience of leading a Statistics department at national, regional, continental or global level;

- Demonstrated experience in at least 2 exercises of, coordinating the development and implementation, of policy frameworks guiding statistical functions in statistics such as NSDS and related.
- Demonstrated Experience on undertaking high-level activities pertaining to advocacy, gender mainstreaming, communication, innovative data sources, cybersecurity and applying results-based monitoring & evaluation within the national statistical system.

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

5. REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES

5.1 Reporting requirements

The consultant shall operate under the guidance of the Director – Policy Planning & Resource Mobilization (PPRM) with direct supervision of the Senior Programme Officer (SPO) – Research and Statistics from the SADC Secretariat. Clearance of the tasks/deliverables shall also be subject to approval by StatsSA.

All the deliverables shall be delivered to the SPO – Research and Statistics, Technical Lead - TL.

All reports shall be in electronic format in MS Word, Excel or PowerPoint as the case may be. The Expert shall work with the Secretariat up to the end of the assignment, shall have delivered the following in electronic format within eight (8) months:

Name of report	Content	Timeline of submission
Inception Report	Outline of the consultant understanding of the assignment and approach/methodology to be implemented with required stakeholders, assumptions, risks, communication methods and workplan with timelines. The document should also provide a structure of the NSDS report.	No later than 14 calendar days after contract signing.
Validated Review/Assessment Findings	Document to cover tasks 3.4 above and feedback from validation.	8 weeks (56 days calendar days) after submission of Inception Report.
Draft and validated NSDS	Document in line with 3.4 above and feedback from validation	8 weeks (56 days calendar days) after submission of validated review/assessment findings.

5.2 Submission & approval of reports

Two copies of the reports referred to above must be submitted to the TL identified in the contract. The deliverables must be written in English. The TL is responsible for reviewing the deliverables in strict collaboration with Stats SA and seeking final approval by the Director - PPRM.

Stats SA will however be responsible for the final approval of the document, including its presentation to the Minister, Cabinet and Parliament.

5.3 Project Management

Overall responsibility for supervision of the Consultancy will lie with the Senior Programme Officer – Research and Statistics (TL). The Consultant shall be responsible for the operational day-to-day management and coordination of the consultancy work as agreed by the TL and StatsSA.

5.4 Management Structure

The Consultant shall report directly to the Senior Programme Officer – Research and Statistics

6. LOGISTICS AND START DATE

6.1 Location

The assignment may involve traveling to Pretoria, South Africa.

6.2 Office accommodation

None required

6.3 Facilities to be provided by the contracting authority

For the expert working on this consultancy, the Contracting Authority shall facilitate for visa entry in South Africa, if required.

6.4 Facilities to be provided by the contractor

The contractor must ensure he/she is adequately prepared and equipped for delivery of deliverables. Moreover, the Consultant is expected to be fully self-sufficient in terms of international travel associated expenses and visa procedures for entry in South Africa. In addition, the consultant must have a laptop and related device connectivity for projector for this consultancy.

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 8 months from the date of signing the agreement. Note: the 8 months is the duration of the assignment and not the number of days required to undertake it. It caters for coordination of work to be done by recipients of the assignment and to a certain extent, flexibility for the consultant to deliver on the outputs.

7. MONITORING AND EVALUATION

7.1 Definition of indicators

The indicators to be used are timeliness, adequacy of technical coverage and analytical quality of the Report as detailed in 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 or group (s), or any expert proposed in their offer is engaged.

8. ASSUMPTIONS AND RISKS

8.1 Assumptions underlying the project

It is assumed that the consultant would be procured within the reasonable timeframe and activities implemented within the schedule provided of 8 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. Delayed delivery of expected outputs as per minimum standards	Medium	Monitor implementation and delivery of outputs every 15 calendar days through Technical Meetings

9. FINANCIAL PROPOSAL

9.1 Financial proposal

The financial proposal should include consultancy fees and all costs associated in its undertaking.

9.2 Schedule of payment

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

10% of the contract price shall be paid upon submission and approval of the Inception Report

40% of the contract price shall be paid upon submission and approval of the validated review/assessment findings

50% of the contract price shall be paid upon submission and approval of the validated NSDS



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