

TERMS OF REFERENCE



CONSULTANCY TO HIRE A FIRM FOR UNDERTAKING OF TRAINING AND TECHNICAL ASSISTANCE FOR COMPUTATION AND ANALYSIS OF POVERTY STATISTICS - MULTIDIMENSIONAL POVERTY INDEX (MPI) METHOD FOR 10 SADC MEMBER STATES

1. BACKGROUND INFORMATION

1.1 Background

The Southern African Development Community (SADC) is a regional community of 15 Southern African states comprising Angola, Botswana, Comoros, DRC, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zimbabwe and Zambia. It was established at the Summit of Heads of State and Government on 17 August 1992 in Windhoek, Namibia.

SADC foundation under Vision 2050 is to attain higher levels of peace and stability, enabling the further prioritisation, pursuit, and achievement of its objectives of socio-economic development, poverty eradication and regional integration.

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.

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
- (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.

While poverty has traditionally been measured in terms of income – now classified by the World Bank as living on less than \$2.15 a day PPP 2017 – the SDGs define poverty as having multiple forms, with a target to reduce at least by half the proportion of men, women and children of all ages living in poverty in all its dimensions by 2030. To date, most countries use a national monetary poverty measure for policy decisions. Recently, a number of policy makers have adopted official multidimensional measures that: (1) analyse non-monetary deprivations and their interconnections; (2) enable the creation of high-impact policies that address multiple interconnected deprivations and accelerate progress towards the SDGs, and (3) guide policy and provide feedback in a timely manner.

The Multidimensional Poverty Index (MPI) can be used as an analytical tool to identify the most vulnerable people, show aspects in which they are deprived and, consequently, to target resources and design policies more effectively. Because the MPI measures outcomes directly, it will immediately reflect changes such as school attendance, whereas it can take time for this to affect income, thus may show outcomes of effective policy interventions quickly.

Finally, in the understanding that each country is different, the MPI can be tailored to local context using country-specific data and indicators to provide a better understanding of country-level poverty. As of 2022, around 40 countries in the developing world have developed and adopted national MPIs as official measure to track progress and coordinate policy actions against poverty. In SADC specifically, 9 out of 16 member states have produced national MPIs.

Following this trend, countries with national MPIs are now currently using their Indices to:

- Allocate resources more effectively;
- Improve policy design;
- Identify interconnections among deprivations;
- Monitor the effectiveness of policies over time;
- Target poor people as beneficiaries of services or conditional cash transfers.

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.

Article 11 of the SADC Protocol on Statistics refers explicitly to poverty statistics. Specifically, Member States shall produce and disseminate Multidimensional Poverty Index (MPI) by gender and age in accordance with the United Nations Development Programme (UNDP) Handbook on How to Build a National MPI built with dimensions of health, education, standard of living and other dimensions tailored to their national priorities, as a common regional methodological framework to produce national and regional poverty statistics. The SADC Regional Strategy for Development of Statistics (RSDS 2020 – 30) is designed as a sectoral strategy to be responsive to data needs to pertaining to measurement of regional policies and programmes of the RISDP 2020 – 30 in pursuit to the goals of the SADC Vision 2050. The RSDS focuses of developing harmonized methodological guidelines in statistics and rolling out of capacity building and subsequent assessment/reviews including in poverty statistics.

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.

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.

SADC Secretariat, with the support from the World Bank Group is currently implementing the Regional Statistics Project (RSP) with the development objective to strengthen the institutional capacity of SADC and participating countries to produce, disseminate and use

quality statistics while increasing regional harmonization and collaboration. Among the scope of interventions in this project, capacity building in the area of poverty statistics features importantly for both monetary and non-monetary measures. A significant milestone was reached in December 2024 where the SADC MPI structure was discussed and agreed. Furthermore, recommendation was made for undertaking of in-depth national trainings in MPI and technical assistance for generation of MPI using real survey data. **It is within this context that this consultancy is looking for a firm (registered firm, research institutions, universities and similar institutions are eligible for the current assignment) to undertake the following core tasks that are mutually exclusive to each other in 10 Member States:**

- (i) National Training dedicated to the methodology and the technical steps required to update the national MPI with both theoretical sessions and practical exercises; and
- (ii) Technical assistance for computation and analysis of poverty statistics – MPI using real data obtained from surveys.

2. OBJECTIVE, PURPOSE & EXPECTED RESULTS

2.1 Overall objective

The overall objective of this consultancy is to enhance the capacity of statisticians in SADC Member States to effectively utilize the MPI as a comprehensive tool for policy development and poverty reduction. By providing in-depth capacity-building workshops and targeted technical assistance, this initiative aims to equip national teams with the necessary skills and knowledge to compute, analyze, and interpret their national MPIs and SADC harmonized MPIs. This, in turn, will enable them to develop evidence-based policies that address the multiple dimensions of poverty, thereby contributing to the achievement of their national development plans, SADC Vision 2050 and Sustainable Development Goals (SDGs).

2.2 Specific Objectives (Purpose)

- (i) Conduct in-depth national trainings on the computation and use of the MPI (including using STATA software) for selected Member States;
- (ii) Provide technical assistance (TA) to selected Member States to compute national and SADC harmonized MPIs based on available survey and/or administrative data; and
- (iii) Assess gaps during training and/or technical assistance (TA) sessions, and identify the necessary support required to ensure Member States produce the SADC harmonized MPIs.

2.3 Results to be achieved by the contractor

The consultancy is expected to achieve the following results:

- i. Training Component: Training Report covering the scope of training provided and the current status including challenges and action plan with timelines of the Member State for generating national MPI and the SADC harmonized MPI;
- ii. Technical Assistance Component: Report covering the scope of work undertaken for generation of national and SADC Harmonized MPIs using real survey and/or administrative data including work processes/documentation for use by the NSO in the foreseeable future.

3. ASSUMPTIONS & RISKS

3.1 COMPONENT 1: NATIONAL TRAINING

3.1-1 Scope of Work

The selected service provider is expected to deliver for respective Member State a week-long (5 day) in-person technical training workshop to build capacity among statisticians and users of poverty statistics in the technical team in charge of computations of the national MPI. The training will include concepts and definitions of MPI including on the structure of SADC harmonized MPI with practical exercises using STATA software. This is key for the understanding of the Alkire-Foster method and how to use it to design, compute and analyse the national MPI.

3.1-2 Geographical area to be covered

The assignment will be carried out in selected Member States of SADC region

3.1-3 Target groups

This consultancy is expected to target producers and users of poverty statistics at national level.

3.1-4 Specific Work

The assignment will be carried out primarily through engagement and discussions with Central Statistics Office of respective Member State and the Statistics Unit of SADC Secretariat.

The assignment will be carried out primarily in person. This will be complemented by preparatory work for the workshops which will be home-based. In particular, the service provider shall:

- Produce Concept Notes for the training to be conducted in Member States
- Develop a training programme for each country on the Alkire-Foster method and how to use it to compute an MPI.
- Tailor the programme to the needs and level of participants in each Member State.
- Prepare the training materials.
- Deliver the training at mutually agreed dates.

- Prepare a short training report for each workshop.

3.2 COMPONENT 2: TECHNICAL ASSISTANCE

3.2-1 Scope of Work

The selected service provider is expected to generate and analyse poverty indicators from mostly recent available survey and/or administrative data for the specific Member State (5 days). In addition, assessment about the structure of the SADC harmonized MPI also must be done using the survey/administrative data availability. A report must be produced with main findings of the survey data that includes work processes using STATA package as part of documentation.

3.2-2 Geographical area to be covered

The assignment will be carried out in selected Member States of SADC region

3.2-3 Target groups

This consultancy is expected to target producers and users of poverty statistics at national level.

3.2-4 Specific Work

The assignment will be carried out primarily through engagement and discussions with Central Statistics Office of respective Member State and the Statistics Unit of SADC Secretariat.

The assignment will be carried out primarily in person. This will be complemented by preparatory work for the workshops which will be home-based. In particular, the service provider shall:

- Produce Concept Notes for the task being undertaken to assist SADC Secretariat and Member States
- Assess the real data obtained from most recent surveys undertaken and possibly, administrative data
- Use STATA to generate and analyze the MPI indicators
- Produce a report with the methodology and results of the national MPI, which the country could publish
- Assess and document the extent to which the survey/administrative data is responsive to generate the SADC harmonized MPI and recommend possible solutions including design of questions for integration in forthcoming surveys.
- Prepare a report documenting all processes including STATA generated codes.

4. QUALIFICATIONS AND EXPERIENCE

This assignment is expected to be carried out by firm consultant. The firm should have proven track record of 10 years of conducting large-scale socio-economic research and providing technical support on computation of poverty statistics, focusing on multidimensional poverty studies at national, regional and global level. The composition of the technical experts has to include:

- (i) Team Leader
- (ii) Technical Experts

Profiles of Experts	Qualifications and Skills	General Experience	Specific Experience
Team Leader	- Minimum of a master's degree in Statistics, Economics and related field. A P.HD in socio economic research is an added advantage. - Excellent oral and written communication, analytical, presentation and report writing skills in English Language. Proficiency in French and Portuguese languages is also a requirement for undertaking of the trainings and TAs in such Member States.	demonstrated experience of 15 years in developing multidimensional indices and working with complex datasets, particularly in the context of developing countries, including SADC Member States.	- Demonstrable experience in undertaking technical assistance in at least 5 countries for the development of national MPIs. - Proficiency in data analysis software such as STATA, R, or similar. - Experience in working with national statistics agencies, and other government institutions
Technical Expert	- Minimum of a master's degree in Statistics, Economics and related field. - Excellent oral and written communication, analytical, presentation and report writing skills in English Language. Proficiency in French and Portuguese languages is also a requirement for undertaking of the trainings and TAs in such Member States.	demonstrated experience of with 7 years in statistical analysis and econometric methods, specifically the Alkire-Foster MPI method.	- Demonstrable experience in undertaking technical assistance in at least 5 countries for the development of national MPIs. - Proficiency in data analysis software such as STATA, R, or similar. - Experience in working with national statistics agencies, and other government institutions

The experts 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 and Resource Mobilization (D-PPRM) and direct supervision of the Senior Programme Officer (SPO) – Research and Statistics.

All the deliverables shall be delivered to the SPO – Research and Statistics whilst the approval of the deliverables shall be the responsibility of the D-PPRM.

All reports shall be in electronic format in MS Word, Excel, STATA or others related as the case may be. The Firm shall work with the Secretariat with specific Member State sequentially. Once a training and/or a Technical Assistance is completed in a given Member State, the consultancy shall then proceed to the delivery of activities in the next Member State sequentially till all 5 Member States are covered. A maximum of 5 training and 5 technical assistance activities shall be made during the financial year ending March 2026. The following deliverables must be delivered the following in electronic format within 1 month after completion of each training and/or technical assistance per Member State being assisted:

Name of report	Content	Time of submission
Training Report	Document to cover results stated at 2.3 and tasks 3.1 above. The recommendations must be SMART and that can be embedded in a results-based framework for monitoring and evaluation to measure impact of the activity.	1 month (30 calendar days) after completion of training component of 1 Member State
Technical Assistance Report	Document in line with 2.3 and 3.2 above. The recommendations must be SMART and that can be embedded in a results-based framework for monitoring and evaluation to measure impact of the activity.	1 month (30 calendar days) after completion of technical assistance component of 1 Member State

5.2 Submission & approval of reports

Two copies of the reports referred to above must be submitted to the entities as identified at 5.1 above. The reports must be written in English.



5.3 Project Management

Overall responsibility for direct supervision of the consultancy will lie with 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.

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 will involve traveling to selected Member States.

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 the selected Member States, if required.

6.4 Facilities to be provided by the contractor

The contractor must ensure is the Team Leader and Technical Expert are adequately prepared and equipped for delivery of the training and drafting of deliverables. Moreover, the Consultancy Firm is expected to be fully self- sufficient in terms of international travel associated expenses in the selected Member States with 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 20 months from the date of signing the agreement. Please see Article 3 of the specific contract for the actual start date and period of implementation.

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 section 5 above. In addition, assessment of the effectiveness of the training to be done using pre and post test surveys with recipients of the capacity building activity.

7.2 Special requirements

The Consultant Firm 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 20 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 through monthly technical meetings

9. FINANCIAL PROPOSAL

The financial proposal should be a lump sum that includes professional fees, travel costs and any other cost for conduct of the trainings in 10 countries with the split of fees individually for the 10 countries.

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 and training materials



9% of the contract price shall be paid upon submission and approval of the Training Report for the first Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the second Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the third Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the fourth Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the fifth Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the sixth Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the seventh Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the eighth Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the ninth Member State trained

9% of the contract price shall be paid upon submission and approval of the Training Report for the tenth Member State trained



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Original Document

Document Name:	2 TORS MPI Poverty Trainings.pdf	Document Size:	330.6 KB
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Email Evidence

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