

TERMS OF REFERENCE



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

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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).

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 substantial and sustainable financial resources. In this regard, support from development partners and donor institutions plays a critical role in ensuring the successful execution of these programmes. The services sector in the SADC region is characterised by moderate levels of investment, relatively high service delivery costs, and limited access to services for a significant proportion of the population. At the same time, international trade in services has become an increasingly important component of Southern African economies and serves as a key input to production across all economic sectors.

Statistics on International Trade in Services (SITS) are essential for monitoring the performance of Pillar I of the Regional Indicative Strategic Development Plan (RISDP), particularly in relation to industrial development and market integration objectives aimed at increasing intra-SADC trade in services. Given the growing significance of services, and trade in services in particular, to economic growth and social development within the SADC region and globally, policymakers, trade negotiators, and economists require timely, reliable, and comprehensive data. This necessitates improved data availability, enhanced data quality, and the production of harmonised regional and international statistics to support evidence-based decision-making and facilitate comparability across countries.

1.2 Current situation in the sector

Secretariat is prioritizing statistical capacity building as part of its implementation plan guided by its strategy, the Regional Strategy for Development of Statistics (RSDS) 2020-30. The RSDS seeks to strengthen the statistical systems of Member States and promote the production and harmonization of high-quality, timely, and internationally comparable statistics to support regional integration, evidence-based policymaking, and sustainable development. Capacity-building interventions are being implemented

in a strategic and results-oriented manner to ensure lasting and measurable improvements in the ability of Member States to produce and disseminate official statistics.

The SADC Protocol on Statistics identifies trade statistics, particularly statistics on trade in services, as a key intervention area. Member States are committed to strengthening cooperation within their National Statistical Systems (NSSs) to improve the coordination, production, and dissemination of trade in services statistics. Furthermore, Member States are encouraged to implement the recommendations contained in the United Nations Manual on Statistics of International Trade in Services (MSITS) to produce annual statistics on international trade in services, inward foreign affiliates statistics (IFATS), and outward foreign affiliates statistics (OFATS) by partner country. These statistics are essential for monitoring and evaluating the implementation of trade in services policies and commitments across the region.

To support the implementation of these commitments, the SADC Secretariat developed the SADC Trade in Services (TIS) Practical Methodological Guidelines and Harmonised Data Collection Instruments during the period October 2024 to July 2025. The primary objective of these instruments is to facilitate the collection of detailed and comparable trade in services statistics, particularly by partner country, to assess the extent of trade liberalisation within the SADC region and with the rest of the world. The harmonised data collection framework comprises the following questionnaires:

- (i) Inward Foreign Affiliates Statistics (IFATS) by industry;
- (ii) Outward Foreign Affiliates Statistics (OFATS) by industry;
- (iii) Statistics of International Trade in Services (SITS) by partner country; and
- (iv) Statistics of International Supply of Services by mode of supply.

These methodological guidelines and data collection instruments provide a harmonised regional framework for the compilation, reporting, and dissemination of trade in services statistics, thereby enhancing the availability, quality, consistency, and comparability of data across SADC Member States. During the period from October 2025 to February 2026, the SADC Secretariat engaged experts from stakeholders institutions to review the draft Trade in Services methodological guidelines and provide technical inputs for incorporation into the revised document. The consultations aimed to ensure that the guidelines reflect international best practices, address emerging developments in Trade in Services statistics, and meet the data requirements of SADC Member States.

Within this background and to continue the progress made in this area, Secretariat has planned an activity to revise and update the SADC Trade in Services (TIS) practical methodological guidelines and harmonised data collection instruments. The revised guidelines are expected to include the recommendations obtained from the key stakeholders institutions.

2. OBJECTIVES OF THE ASSIGNMENT AND EXPECTED RESULTS

2.1 Overall objective

The overall objective of this exercise is to develop practical guidelines to assist Member States for collection of disaggregated trade in services statistics.

2.2 Specific objectives

The specific objective of this assignment is to revise and update the current drafts of the SADC Trade in Services (TIS) practical methodological guidelines and harmonised data collection instruments to align with emerging developments in international trade in services statistics and evolving policy needs within the SADC region. In particular, the revised guidelines should incorporate the recommendations obtained from international organizations and experts from Member States, which will be shared with the consultant.

2.3 Expected results

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

- (i) Final version of SADC Trade in Services practical methodological guidelines and harmonised data collection instruments validated.

3. SCOPE OF WORK

3.1 Scope of work

The assignment consists of reviewing and updating the existing draft of the SADC Trade in Services (TIS) Practical Methodological Guidelines and Harmonised Data Collection Instruments. The consultant will build on the current draft and the technical comments received from Member States and international organisations to produce a revised and validated set of regional guidelines and data collection instruments.

The scope of the assignment includes:

- (i) Reviewing the existing draft methodological guidelines and harmonised data collection instruments together with the technical comments and recommendations provided by experts from Member States, UNCTAD, the World Bank, the IMF, and other stakeholders;
- (ii) Revising and updating the methodological guidelines and harmonised data collection instruments to address the agreed recommendations and align them with current international statistical standards and best practices;
- (iii) Conducting an online regional validation workshop with National Statistical Offices (NSOs), Central Banks, trade in services experts, and the SADC Secretariat to validate the revised draft;

- (iv) Finalising the methodological guidelines and harmonised data collection instruments by incorporating comments received during the validation workshop for submission to the SADC Statistics Committee.

3.2 Geographical area to be covered

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

3.3 Target groups

In revising and updating 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 primarily be undertaken through desk research complemented by consultations with the SADC Secretariat and relevant stakeholders. In carrying out the assignment, the consultant shall:

- (i) Review the existing SADC Trade in Services (TIS) Practical Methodological Guidelines, Harmonised Data Collection Instruments, and all technical comments and recommendations provided by Member States and international organisations.
- (ii) Review relevant international standards, manuals, and good practices relating to Trade in Services statistics, including recent developments in the measurement of international trade in services.
- (iii) Revise and update the draft methodological guidelines by incorporating the agreed technical recommendations, including where applicable:
 - methodological guidance on digital trade and digitally delivered services;
 - enhanced guidance on Freight and Transport Services statistics;
 - integration of the UNCTAD TISSTAT tool;
 - alignment with current international statistical standards and best practices; and
 - practical guidance to strengthen the compilation and reporting of internationally comparable Trade in Services statistics.
- (iv) Review and streamline the harmonised data collection instruments to improve survey implementation while maintaining sufficient flexibility for Member States to expand coverage and incorporate emerging service categories.
- (v) Prepare and submit the draft revised SADC Trade in Services Practical Methodological Guidelines and Harmonised Data Collection Instruments.

- (vi) Facilitate an online regional validation workshop with Member States and the SADC Secretariat, present the revised draft, and prepare a validation workshop report documenting the comments and recommendations received.
- (vii) Finalise the methodological guidelines and harmonised data collection instruments by incorporating the agreed comments from the validation workshop and submit the final documents to the SADC Secretariat for consideration by the SADC Statistics Committee.

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.

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 90 calendar days:

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.	56 days after submission of inception report
Final Report	Revised SADC Trade in Services practical methodological guidelines and harmonised data collection instruments, and Regional Validation Report.	21 days 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 approved Inception report;

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

20% of the contract price shall be paid upon submission of an approved final report and regional validation report.



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