



## **Terms of Reference for a consultancy to undertake an assessment of current practices on poverty and inequalities measurement and profiles in SADC**

### **1. BACKGROUND**

The Southern African Development Community (SADC) is a regional community of 16 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's main mission is to promote sustainable and equitable economic growth and socio-economic development through efficient productive systems, deeper co-operation and integration, good governance, and durable peace and security.

Poverty eradication and improvement of the well-being of the people of the 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. The Treaty establishing SADC in Article 5 states the specific objectives of SADC in relation to poverty as:

- (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 and inequalities remain the greatest challenges 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 and inequalities, strengthen collective efforts to address poverty and inequalities through regional cooperation and integration and to continue dialogue on the partnerships necessary to accelerate the achievement of the Millennium Development Goals (MDGs). The main outcome of the Conference was the signing of a Declaration on Poverty Eradication and Sustainable Development by the Heads of State and Government. Among others, the Heads of State and Government resolved to:

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

With regard to monitoring progress in poverty eradication and reduction in inequalities initiatives, the Declaration further highlighted the need to work towards the establishment of a Regional Poverty Observatory (RPO) that would monitor progress made in the implementation of actions in the main priority areas of poverty eradication. The Declaration 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.

As part of the German Development Cooperation (GDC), the government of Germany supports initiatives that drive the partnership and technical cooperation between Germany and SADC. The government of Germany, implemented by the GIZ, thus supports the consultancy study.

## **1.1 CONTEXT AND RATIONALE**

Following the Declaration of the Consultative Conference on Poverty and Development for SADC Heads of State and Government held in 2008 in Mauritius, and subsequent decisions of Council and Summit on the establishment of a SADC Regional Poverty Observatory, the Secretariat commissioned Consultants to develop a concrete proposal for the establishment of the RPO. The institutional, technical and financial architecture of the RPO proposed by the consultants were subsequently approved by Council and endorsed by Summit in August 2010, in Windhoek, Namibia. The main objectives of the RPO, among others, include the following:

- (a) Evaluating the effectiveness of individual and common strategies, policies and programmes on poverty reduction;
- (b) Creating a database for assessing Member States' poverty profiles; and
- (c) Developing mechanisms for effective monitoring of living conditions and poverty at country level within the context of Poverty Reduction Strategies and National Development Plans

As part of the RPO activities to develop a poverty measurement mechanism, the SADC Secretariat organized a two- day regional sensitization workshop on the Multidimensional Poverty Index (MPI) in South Africa in March 2013. The Oxford Poverty Human Initiative (OPHI) facilitated the workshop which was attended by statisticians and poverty experts from the member states. As a result of the workshop, the need for a more comprehensive training on technical details of MPI concepts, definitions and methodological issues was noted to fully appreciate the robustness of the MPI in measuring poverty in Member States. Participants further identified the critical need for building consensus among Member States on a common definition of poverty. The definition would need to include an agreement on variables in the computation of the harmonized national MPI indexes, to enable derivation of aggregate SADC regional MPI which captures prevailing local conditions.

The SADC Statistics Committee, at its meeting held in June 2015 in Harare, Zimbabwe, agreed with the above observations and urged the Member States to share country experiences on the measurement and assessment of poverty, including the compilation of the Multidimensional Poverty Index.

Due to various challenges, including inadequate resources and capacity deployed for the RPO at the SADC Secretariat, it has not been possible to establish an optimally functional RPO Unit which can be expected to fully deliver on its mandate. However, the need to develop and implement evidence based poverty initiatives and programmes in SADC remains evident. Currently available poverty measures for SADC Members, and profiles generated thereof, are not comparable since there is not a common understanding of poverty and results are derived using different methodologies. Therefore, building consensus among stakeholders in the Member States on a common definition for poverty is imperative. A harmonized approach to collect statistics in the Member States is a pre-requisite to generate quality regional statistics.

Presently, there is not a system in place that sustainably tracks the impact of poverty eradication programmes at regional level. Member States have their own respective programmes and initiatives to mitigate the impact of poverty, such as Poverty Eradication Programmes, Poverty Reduction Strategy Programmes, etc. However, the achievements realized from such programmes are fragmented, when viewed from a regional perspective. At the same time, the impact of the draft Regional Poverty Reduction Strategy that was formulated in 2010 has not been measured. The strategy as well as the monitoring of its impact will need to undergo a thorough review, in line with common methodologies and approaches and including the role of the RPO. In particular systems for gathering of relevant statistical data and indicators for measurement of the characteristics and levels of poverty and its trends should also be reinforced within and aligned to the realm of existing official statistical frameworks of respective member states.

## **1.2 STUDY OBJECTIVE**

The main objective of the study is to develop a harmonized approach to define and measure poverty in the SADC region, based on the assessment of the SADC Member States' respective approaches. The study will provide the baseline data from the Member States and include a roadmap to enable sustainable, comparative monitoring of poverty in the region, including recommendations to Member States to improve their national systems to reach this objective.

Specific objectives:

- (i) To conduct an assessment of current status of poverty statistics, measurements and capacities in national level systems of SADC Member States for sustainable production of reliable statistics on poverty;
- (ii) To develop a robust, harmonized definition of poverty for the SADC region, including an approach to measure poverty on a regional level, agreed upon by the SADC Member States and considering international best practices;
- (iii) To assess possible gaps in Member States to provide data that enable a comparable measure of poverty on a regional level;
- (iv) To review Regional Poverty Reduction Strategy and role of the RPO and based on findings develop roadmap to sustainably monitor poverty on a regional level;
- (v) To facilitate regional workshop to validate findings of the study and agree on next steps.

## 2. SCOPE OF WORK OF ASSIGNMENT

The scope of work is to be implemented within a four month time period. Specifically, the Consultants will:

- (i) Carry out extensive desk review of status of poverty statistics in the SADC Member States with focus on definition, data search, methodologies and standards being used by all member states to compile poverty statistics;
- (ii) Determine extent of comparability of existing poverty and inequalities statistics and trends amongst Member States in the region;
- (iii) Assess variability of existing formats for disseminating poverty and equalities statistics and indicators among Member States with particular focus on production of poverty and inequalities atlases or maps;
- (iv) Determine adherence to internationally accepted best standards and practice for compilation, analysis and dissemination of poverty and inequalities statistics by Member States;
- (v) Based on the detailed assessment, suggest a joint definition of poverty and a methodology how to measure it.
- (vi) Develop a roadmap to enable comparable poverty measurement on a regional basis, including a thorough review of the Regional Poverty Reduction Strategy and role of the RPO
- (vii) Provide recommendations to improve existing initiatives for the development of robust statistical systems for collection, analysis and dissemination of poverty and inequalities statistics including development and maintenance of poverty and inequalities statistics databases at national and regional levels;
- (viii) Provide estimates of cost implications for implementing interventions proposed in the roadmap; and
- (ix) Present report of findings and recommendations on current status of poverty statistics and capacities in national statistical systems of SADC Member States to Regional Experts Group meeting for validation.

### 3. DELIVERABLES

The list below presents the expected main outputs to be delivered through the consultancy in the course of undertaking the assignment

1. Inception report, which will be presented during an inception meeting. The report should elaborate on the following:
  - a. methodology;
  - b. data collection;
  - c. sampling;
  - d. indicative stakeholder map
  - e. analysis and preliminary findings;
  - f. limitations and risks and;
  - g. draft work plan and individual milestones
2. First draft report to be presented in a regional meeting
3. Final report incorporating all comments and inputs made.

The study will commence with a kick- off meeting one week after the consultancy contract has started (may be done via skype) in which the consultant presents his / her understanding of the project in depth. The presentation should be done in a documented manner and the document should serve as guidance and a point of reference for both parties along the consultancy.

The inception report and the draft report need to be shared with the contact points 5 working days prior to the respective meetings.

Period of contract

The assignment is foreseen to be finalized by October 2018. Reliability and strict time keeping by the consultant are expected at all times.

No	Description of Activities	Proposed Number of Man Days
1	Inception/kick off meeting with PPRM Staff and GIZ Team	1
2	Desk review and preparation of draft inception report detailing among others, the evaluation methodology, data collection instruments, work plan and requisite logistics.	4

3	Present the inception report to SADC Secretariat.	1
4	Conduct interviews with Secretariat staff and Member States (virtual interviews) and further desk review  Visit at least 4 countries	16  10
5	Present progress to SADC statistics committee (June 2018)	2
6	Develop Draft report	8
7	Hold regional validation workshop and present draft report	2
8	Submit Final report	3
<b>Total Number of Man Days</b>		<b><u>47</u></b>

#### Place of Assignment:

Flexible, provided that telephone, skype calls and a video conference can be used for some of the interviews, where possible. Some Member States stakeholders will be interviewed personally, whereas others will be contacted telephonically or via skype. The inception report will be presented at the SADC Secretariat in Gaborone, Botswana. Progress will be presented at the SADC statistics committee in June 2018, the location is yet to be confirmed. The first draft report will be presented in a regional workshop to be held in Johannesburg, South Africa or another suitable venue.

#### 4. REQUIREMENTS AND QUALIFICATIONS

The consultant should meet the following requirements:

- (i) Possess at least an advanced degree in the field of Economics, Statistics or Development Economics or related field, with an emphasis on statistical compilation and dissemination.
- (ii) Have demonstrated experience at national or regional level in design/development and implementation of statistical systems relating particularly to poverty and related economic and social statistics in accordance with international best practices;
- (iii) Have extensive experience and/or exposure in the management and/or conduct of Demographic and Health Surveys, Living Conditions Monitoring Surveys and Household Income and Expenditure Surveys, among others is desirably preferable

- (iv) Have demonstrated capacity to particularly to undertake training and capacity building in source and methods for measurement of poverty and generation of poverty statistics and indicators and information management;
- (v) Have knowledge of SADC region and current statistical issues affecting the region with particular focus on poverty related statistics and indicators.
- (vi) Fluency in English is mandatory; knowledge of French and or Portuguese will be considered an advantage.

## **5. METHODOLOGY**

The technical assessment will be undertaken by the consultant under the direct supervision of the Director of Directorate of the Policy Planning Resource Mobilisation (PPRM) of the Secretariat with support from Senior Officer - Statistics Unit, the Senior Policy Advisor and a representative from the GIZ. The assessment will mainly involve gathering and analyzing of relevant data and information from key institutions of National Statistics Systems (NSS) of the Member States. The National Statistical Offices of each respective Member State will be the major focal institution for this exercise. This will be undertaken within the context of the functions of the SADC Statistics Committee for which Heads of National Statistical Offices are bona fide members of the Committee.

Requisite information and data for the assessment will be gathered through a desk study approach, complimented by well-designed research tools and working with Heads of National Statistical Offices (NSOs) and the National Planning Entities (NPEs) of respective Member States. Websites of NSOs and other national stakeholder institutions in Member States should also be visited in gathering of relevant information and data. The consultant(s) will also further undertake country visits to a few selected Member States, depending on the budget and agreed scope.

The findings of the assessment will be presented at an expert regional validation meeting on status of poverty statistics in Member states. The consultant will revise and finalise the report based on comments, observations and any further inputs from the meeting. There will be a proposed roadmap for addressing the challenges of identified challenges should have timelines, cost and technical implications.

## **6. CONDUCT OF WORK AND REPORTING**

### **a) Work Supervision**

The overall responsibility for this assignment will be the Director of Directorate PPRM of the Secretariat. The consultant will therefore work under overall supervision of the Director – PPRM. The consultant will work closely with the Head of the Statistics Unit and the Senior Policy Advisor as well as a representative from the GIZ. The consultant is expected to consult relevant stakeholders and experts from the SADC Secretariat and Member States to enhance ownership and hasten the pace of finalization of the assignment.

The role of the Secretariat will mainly be to support the consultant with the relevant documentation and to make the necessary logistical arrangements for meetings with various stakeholders. The Director PPRM shall initially circulate the draft report on the assignment to the members of the SADC Statistics Committee and the RPO Steering Committee for comments before the meeting of poverty experts to validate the findings.

### **b) Roles and Responsibilities**

The Directorate of Policy Planning Resource Mobilization, as the client, shall assist the consultant(s) to get access to necessary information, data and reports used for execution of the consultancy services under the SADC custody. The consultant(s) shall accordingly be assisted to obtain access to information and documents in connection with the assignment.

The consultant shall be responsible for arranging all necessary office and living accommodation, transport, equipment and supplies, secretarial services related to the performance of the work. In particular, the consultant shall be:

- (i) Responsible for printing of all the reports; and
- (ii) Responsible for cost associated with the input for production of expected outputs as per the Terms of Reference
- (iii) Facilitate a regional workshop

The inception report of the consultant should clearly spell a detailed work plan and proposed practical timelines to undertake and complete the assignment.