

TERMS OF REFERENCE



CONSULTANCY TO HIRE A FIRM FOR UNDERTAKING OF NATIONAL TRAININGS ON R IN TEN (10) SADC MEMBER STATES

Table of Contents

1. BACKGROUND INFORMATION.....	4
1.1 Partner country	4
1.2 Contract authority	4
1.3 Background.....	4
1.4 Current situation in the sector	4
1.5 Needs assessment.....	5
2. OBJECTIVES, PURPOSE AND EXPECTED RESULTS	5
2.1 Overall objective	5
2.2 Specific objectives (Purpose).....	5
2.3 Results to be achieved by the Consultancy Firm	5
3. SCOPE OF WORK FOR TRAINING ON R	5
3.1 Scope of work	5
3.2 Geographical area to be covered.....	6
3.3 Target groups.....	6
3.4 Specific work.....	6
3.5 Reserve for continuation of contract	7
3.6 Eligible entities	7
4. QUALIFICATION AND EXPERIENCE REQUIREMENTS	7
5. REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES	9
5.1 Reporting requirements	9
5.2 Submission and approval of report	10
5.3 Project management	10
5.4 Management structure	10
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.....	11
7.1 Definition of indicators.....	11
.Special requirements	11

8. ASSUMPTIONS AND RISKS.....	11
8.1 Assumptions underlying the project.....	11
8.2 Risks.....	11

1. BACKGROUND INFORMATION

1.1 Partner country

The Southern African Development Community (SADC).

1.2 Contract authority

The Contracting Authority is SADC Secretariat, represented by its Executive Secretary.

1.3 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) and the Vision 2050. 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.

1.4 Current situation in the sector

In the discipline of Official Statistics there is an absolute necessity of evolving towards programming languages oriented to modern data science to face new challenges such as fast prototyping innovative ideas, standardizing production processes and automatizing manual tasks. The implementation of statistical techniques, methods and methodologies can be done with R functions, scripts and packages in a proper manner following the principles of modularity.

Secretariat is prioritizing statistical capacity building as part of its implementation plan guided by the Regional Strategy for Development of Statistics (RSDS) 2020-30. With the Regional Statistics Project funded by the World Bank, capacity building shall basically come in the form of development of practical guidelines in specific domains; rolling out national and regional training programmes and; assisting Member States through technical assistance. Data management and processing is within the sub-component 1.1 on improving capacity for data production, management and dissemination of the World Bank project.

With the growing need of analysing voluminous and complex survey data on a timely basis, open-source statistical software play a significant role. Thus, Secretariat is recruiting a consultancy firm which may include but not limited to research centres or universities to train SADC Member States statisticians on R for beginners and intermediate level.

1.5 Needs assessment

SADC Member States requested training on R for Statisticians handling data on daily basis for production of official statistics.

2. OBJECTIVES, PURPOSE AND EXPECTED RESULTS

2.1 Overall objective

The overall objective of this exercise is to train Member States on the use of statistical software for management of large database and analysis of complex surveys.

2.2 Specific objectives (Purpose)

The specific objective of the assignment is to undertake a national training on R for processing of data for official statistics, especially:

- (i) to provide participants with basic knowledge about the syntax and basis of the R programming language and to provide an overview of the main packages of R which are important for the statistical production process; and
- (ii) to provide participants with intermediate level knowledge on R for production and dissemination of official statistics

2.3 Results to be achieved by the Consultancy Firm

The Consultancy Firm is expected to achieve the following result on R training:

- (i) Strengthened technical capacity of Statisticians from National Statistics Offices with the ability to develop R code and use R packages to perform data management and processing, data analysis and visualization carried out in the National Statistics Offices for official statistics.

3. SCOPE OF WORK FOR TRAINING ON R

3.1 Scope of work

The selected service provider is expected to deliver for respective Member State for 10 working days over two weeks (5 working days for Beginners and 5 working days for Intermediate levels) in-person technical training workshop on R to process and analyze official statistics for data producers of official statistics at national level.

The training must provide for theoretical and practical sessions on data management, statistical analysis, tabulations, graphics and maps and how to process, compile and analyze official statistics from surveys and censuses, large database and complex

surveys, big data using R and R-Studio. The training report should contain summary of topics covered during training week. Training materials should also be shared to all participants and annexed to be training report.

It is expected that the training to be done with real anonymized data obtained from censuses, survey and administrative data undertaken by National Statistics Offices.

3.2 Geographical area to be covered

The assignment will be carried out in 10 selected Member States of SADC Region.

3.3 Target groups

This consultancy is expected to target the National Statistics Office and other stakeholders, in particular, statisticians involved in processing and analysis of official statistics, large data and complex surveys. Specific work

3.4 Specific work

The assignment will be carried out through a national training in selected Member States of SADC Region.

In particular, the consultant will be required to:

- (i) Inception report detailing approach, methods, assumptions, risks, timelines and content of topics covered and training programme
- (ii) Develop a generic training programme to cater for practical training on R.
- (iii) To tailor the programme to the needs of each Member State for intermediate level.
- (iv) To deliver the training at mutually agreed dates
- (v) To give training on application of R in data processing, management and analysis in survey data and census and other complex data and to cover at least the following topics **for beginners level:**

- Essentials of R environment and RStudio
- Importing data in R
- Merging data in R
- Programming with R, object-oriented
- Data manipulation with R: data mining, computing new variables, recoding variables, treatment of missing values,
- R and data cleaning
- Descriptive statistics with R
- Crosstabulation and overview of statistical tests
- R Graphics, data visualization with R
- R packages: practical applications for daily production of official statistics
- R in production: data analysis

- (vi) To give training on application of R in data processing, management and analysis in survey data and census and other complex data and to cover at least the following topics **for intermediate level:**
- Sampling (and sampling packages) and estimation
 - Weighting (and weighting packages)
 - Association Tests (when and how to use and interpret the different tests of association with R: Pearson, Spearman and Kendall, Chi-Square,)
 - Mean difference tests: independent sample-T test, paired-sample T test, one way ANOVA, two way ANOVA, one-way MANOVA, Mann-Whitney test, Wilcoxon, Kruskal-Wallis.)
 - Modelling and predictive techniques with R
 - Use of R to carry out correlation and linear regression analysis
 - Bivariate analysis
 - Reliability analysis
 - Time series visualisation and analysis
 - Maps
 - Text analysis
 - Data reporting with R - tables, markdown, LaTeX
 - R in production: data analysis
 - R in production: automation
 - Data manipulation with R
 - Any other statistical packages useful for official statistics
- (vii) Produce well documented Training Materials to be shared with participants with step-by-step indication for all the topics covered
- (viii) Produce a Training Report for each Member State with a summary of topics covered during the training and recommendations for implementation.
- (ix) To do a pre- and Post-Training Surveys assessment of participants knowledge and identifying areas of improvement

3.5 Reserve for continuation of contract

The assignment is for training in 10 SADC Member States. The Firm shall be subject to evaluation after each training in a Member State. Continuation of contract is upon satisfactory completion and quality of the previous assignment.

3.6 Eligible entities

Eligible entities for the current assignment are consultancy firm which may include but not limited to research centres or universities.

4. QUALIFICATION AND EXPERIENCE REQUIREMENTS

This assignment is expected to be carried out by experienced Master Trainers from the Consultancy Firm and there should be evidence of in-depth knowledge with the open-

source software (R among others) and trainings at national, regional and international level. The specific profile of Experts is provided below:

Profiles of Experts	Qualifications and Skills	General Experience	Specific Experience
TWO (2) Expert Trainers	- A minimum Masters Degree in statistics, economics, IT, Data Science or related field. PhD degree in the above mentioned field shall be an advantage Written and oral fluency in the 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. - French and Portuguese fluency shall be highly desired for undertaking training in French and Portuguese speaking countries	The Expert Trainers Must have at least fifteen (15) years of experience using R	- Demonstrated experience in statistical data processing and analysis, spatial analysis, modelling and data visualization using R for at least 10 years continuous and for at least 3 surveys for Official Statistics; 7 years experience in data analysis and data visualization for both quantitative and qualitative data and Big Data; 5 years experience in using R to analyse geospatial data/satellite imagery required; - Experience in the design and implementation of training materials during at least 3 trainings for the conduct of statistical data analysis training in Official Statistics using R; - Extensive experience in as a resource person in delivering at least 5 training on R at national/regional/international stages, particularly using household and census data. - Experience in working with national statistics agencies, and other government institutions

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.

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.

All reports / training materials shall be in electronic format in MS Word, Excel or PowerPoint format as the case may be. Scripts and commands for R should be shared with SADC Secretariat and the participants. The training materials including power point presentations and R scripts will be the property of SADC Secretariat and will be used for additional training if required. The Expert shall work with the Secretariat up to the end of the assignment, shall have delivered the following in electronic format as per specified timeline in the table below:

Name of report	Content	Time of submission
Inception report	The inception should demonstrate how the training will be organised and its effectiveness towards impactful results. It should have include the objectives, expected outcome, methods, assumptions, risks, timelines of the training as well as topics to be covered and training programme	No later than 7 calendar days after the signing of the contract.
Training reports	For each Member State trained, each report should cover: - summary of topics covered during training week; - Pre and post-assessment of participants and - Final Training Materials	No later than 10 calendar days after the completion of the national training workshop for each Member State.

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 Senior 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 Senior Officer – Research and Statistics and perform the assigned tasks.

6. LOGISTICS AND START DATE

6.1 Location

The assignment will involve traveling to selected SADC 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 SADC Member States, 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 the training and drafting of deliverables. Moreover, the Firm is expected to be fully self-sufficient in terms of international travel associated expenses, 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 Reports as detailed in 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.

.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 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. 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 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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Signature Request

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Request Type:	WebSigning	Request Status:	WEBVIEWER SIGNED

Original Document

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Email Evidence

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Web Evidence

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Email Evidence

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Email Sent Timestamp:	Not available in Silent Mode	Email Opened Timestamp:	Not available in Silent Mode

Web Evidence

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Action:	APPROVE	Reason for Action:	Proceed

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