



**NOTE FOR PROSPECTIVE CONSULTANTS:**

- If you are interested in submitting your CV for this assignment, kindly email [robertj@finmark.org.za](mailto:robertj@finmark.org.za)
- See the Scoring Grid (Annex 1) for the desired qualifications, skills and professional experience
- Deadline for CV submission: To be advised on request

**SUPPORT TO IMPROVING BUSINESS AND INVESTMENT ENVIRONMENT (SIBE)**

**Terms of Reference (ToR) for Recruitment of Short-Term Expert (STE)**

Title of Assignment:	<b>Develop a strategy document to guide the Secretariat to showcase SADC investment projects in regional and international investment forum</b>
Reference no.:	TOR .....
Activity Code:	16276
Responsible SADC SPO:	Mario Lironel
Date of issue:	4 March 2021

**1. Background**

1.1 Background SADC	<p>The Southern African Development Community (SADC) was formed in 1980 as the “Southern African Development Co-operation Conference” (SADCC) by nine of the current 16 Member States. On 17 August 1992 in Windhoek, Namibia, the SADCC was transformed into SADC with the signing of the SADC Declaration and Treaty. SADC currently has 16 Member States: Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini (formerly Swaziland), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, United Republic of Tanzania, Zambia, and Zimbabwe. Article 5 of the Declaration and Treaty of SADC identifies the Organisation’s key objectives as:</p> <ul style="list-style-type: none"> <li>• to further the socio-economic integration of the Region and thus attain development and economic growth, the alleviation of poverty and an enhanced standard and quality of life.</li> <li>• to encourage political co-operation, evolve common political value systems and institutions; and to promote peace and security.</li> <li>• to encourage self-sustaining development based on collective self-reliance and interdependence of Member States.</li> <li>• to advance complementary national and regional strategies and programmes.</li> <li>• to support and maximise productive employment and utilisation of resources within the Region; and</li> <li>• to achieve sustainability of natural resources and effective protection of the environment.</li> </ul> <p>The Treaty aims are implemented through agreements including Protocols</p>
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	<p>that are legally binding international agreements committing the Member States to the objectives and specific procedures stated within them. Currently, SADC has 26 Protocols, including the Protocol on Finance and Investment (2006 which was amended in 2016); the Protocol on Trade (1996); the Protocol on Mining (1997); and the Protocol on Trade in Services (2012).</p> <p>There are additional strategic documents that guide SADC's activities towards regional integration including the Regional Indicative Strategic Development Plan (RISDP, 2003) that outlines an agenda for regional integration that includes completing negotiations for a Customs Union by 2010, a Common Market by 2015 and a common currency by 2018.</p> <p>The Community is supported by the SADC Secretariat that is based in Gaborone, Botswana. SADC is a consensus-based organisation, and the mandate of the Secretariat is facilitatory. Any disputes that cannot be resolved through diplomatic channels may be referred to the SADC Tribunal. For further information see <a href="http://www.SADC.int">www.SADC.int</a>.</p>
<p>1.2 Background - SIBE Programme</p>	<p>The Support to Improving Investment and Business Environment (SIBE) Programme is a five-year Programme, implemented by the Finance, Investment and Customs (FIC) Directorate and financed to the tune of €14 million by the EU under the 11<sup>th</sup> European Development Fund (EDF). The Financing Agreement and the Contribution Agreement were signed in June 2019 and August 2019, respectively. The Programme will be implemented over a period of 55 months from the date of signature of the Agreements. The Programme will be implemented by the SADC Secretariat and will cover all the 16 SADC Countries.</p> <p><b>The overall objective</b> of the Programme is to achieve sustainable and inclusive growth and support job creation through the transformation of the region into a SADC investment zone and promoting intra-regional investment and Foreign Direct Investment (FDI) in the SADC region, with enhanced integration of financial markets, enhanced financial inclusion and access to capital, particularly for Small and Medium Enterprises (SMEs).</p> <p><b>The specific objective</b> of the SIBE Programme is to develop the region into a SADC investment zone, promoting intra-regional investment and FDI in the SADC region, especially SMEs.</p> <p>The Programme focuses its support on the following Key Results Areas (KRAs):</p> <ul style="list-style-type: none"> <li>• KRA1 - An enabling investment policy framework across SADC Member States is supported: <ul style="list-style-type: none"> <li>(i) Sub KRA 1.1 – Set-up a dialogue at regional level on improving investment and business environment in SADC.</li> <li>(ii) Sub KRA 1.2 – Provide ad-hoc support to Member States in developing structured public-private dialogue mechanisms for improving investment and business environment in SADC.</li> <li>(iii) Sub KRA 1.3 - Harmonisation of SADC Member States' investment and business environment related laws and regulations; and</li> <li>(iv) Sub KRA 1.4 - Enhancement of the SADC Tax regime in support of a conducive investment and business environment.</li> </ul> </li> <li>• KRA2 - Enhanced integration of financial markets in the SADC region</li> </ul>

	<p>is promoted.</p> <ul style="list-style-type: none"> <li>• KRA3 - Enhanced financial inclusion is supported:</li> <li>• KRA4 - Results-oriented programme performance management capacities strengthened.</li> </ul> <p>The Programme will be implemented by SADC Secretariat supported by long- and short-term experts. The tasks envisaged for the Secretariat include procurement, managing the resulting contracts, payments, reporting to the various stakeholders as well as monitoring and evaluation. The Programme will be coordinated and implemented by the Senior Programme Officer – Finance and Investment under the operational oversight and guidance of the Director of Finance Investment and Customs (FIC).</p> <p>The SADC Secretariat has contracted a consortium composed of FinMark Trust, GFA Consulting Group and Southern Africa Trust (the SADC Support Consortium), under a Service Contract for a Technical Assistance Team including one Long Term Expert to coordinate and manage implementation of activities across the 3 result areas and a pool of Long and Short-Term Experts.</p> <p>These Terms of Reference (ToRs) are a request for the provision of Short-Term Expert (STE) services to the SIBE Programme to <b>“Develop a strategy document to guide the Secretariat to showcase SADC investment projects in regional and international investment forum.</b> The Assignment will be carried out by one contracted senior level STE.</p>
<p>1.3 Background - this Assignment</p>	<p>This Assignment is being commissioned under <b>SIBE KRA 1 “An enabling investment policy framework across SADC Member States is supported”, Activity 1.1 “Set-up a dialogue at regional level on improving investment and business environment in SADC”.</b></p> <p>According to the World Investment Report 2019 in the last decade, total investment in the region has averaged between 20 per cent and 24 per cent of GDP. Few Member States (Lesotho, Mozambique, Seychelles, and Zambia) have managed to record high total investments averaging 30 per cent of GDP.</p> <p>During the same period, the stock of inward Foreign Direct Investment (FDI) in the region has increased steadily at an annual rate of 14%, making it one of the fastest growing regions in the world. However, the spread of FDI inflow in the region is skewed with few Member States accounting for a large component of the FDI.</p> <p>As enshrined in the existing Regional Indicative Strategic Development Plan (RISDP) 2015 – 2020, industrial development, market integration and infrastructure development are among the main SADC priority intervention areas. The mentioned focus areas require substantial investment to enhance regional productive capacity, competitiveness, and connectivity. Therefore, attracting FDI and intra SADC investment core to SADC developmental integration agenda.</p> <p>SADC recognises that to improve the levels of investment in the region there is a need for creation of a favourable investment climate that is responsive to the needs of the investors and the private sector, whilst remaining competitive. SADC Member States need to take concrete steps to improve their investment climate and to begin to work towards ensuring that investment supports industrialization and SME development.</p>

	<p>The important thing is to attract investments that will enhance the productive capabilities of the region as well as build linkages with global partners. According to available data, SADC has comparatively low shares of intermediate and capital goods imports, and exports are highly tilted towards unprocessed natural resources. This suggests that SADC does not have very developed regional supply networks and does not have high participation in global networks.</p> <p>Under the SIBE Programme, the SADC Secretariat would like to recruit a short-term expert (STE) to support the SADC Secretariat to showcase its strategic regional programmes and projects in regional and international investment forums in order to attract investors into SADC Region.</p>
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## 2. Description of the Assignment

2.1 Global objective	<p><b>The overall objective</b> of this assignment is to contribute to achieving sustainable and inclusive growth, support job creation and support the industrialisation agenda in the SADC region through promotion of a conducive intra-SADC and foreign direct investment.</p>
2.2 Specific objectives	<p><b>The specific objective</b> of the assignment is to promote SADC as an attractive investment destination.</p>
2.3 Requested services	<p>The STE is expected to assist the region on its efforts to promote the SADC investment opportunities through the regional and international forums. The STE will specifically, but will not be limited to:</p> <p><b>(i) Develop a strategy and a Roadmap on showcasing the SADC programmes and projects:</b></p> <p>Following tasks will be undertaken:</p> <ol style="list-style-type: none"> <li>a. Define the objectives of the strategy and Roadmap.</li> <li>b. Define the best approach, mechanism and model of participation considering the international trends and best practices.</li> <li>c. Assess the opportunity of twining with SADC Industrial Week and transform into ADC Investment and Industrial Forum providing a platform to showcase SADC investment opportunities.</li> <li>d. Develop strategic recommendations including a roadmap for showcasing SADC investment projects in regional and international investment forums and key Performance Indicators for the assessment of the impacts of participating in a forum.</li> </ol> <p><b>(ii) Update the SADC Compendium of Investment projects, programmes and business opportunities for investors' targeting, investment roadshow events and Investment forums.</b></p> <p>Following tasks will be undertaken:</p> <ol style="list-style-type: none"> <li>a. Compile investment projects and key Programmes at regional level.</li> <li>b. Profile Investment projects.</li> <li>c. Update the SADC compendium of major investment projects and</li> </ol>

	<p>programmes.</p> <p>d. Package major business opportunities from Member States.</p> <p><b>(iii) Identify the relevant regional and international forums:</b></p> <p>a. Identify the relevant regional and international forum.</p> <p>b. Establish priorities and suggest a list of regional and international forum for SADC Secretariat and Member States.</p>
2.4 Deliverables	<p>The main expected <b>deliverables</b> of this assignment are:</p> <ul style="list-style-type: none"> <li>• Inception Report with a detailed work plan, timeframe, and approach to undertake the assignment.</li> <li>• An Updated SADC Compendium of profiled Investment projects and a package of business opportunities from Member States.</li> <li>• A strategy document containing recommendations including a roadmap and key performance indicators.</li> <li>• A report highlighting the main deliverables.</li> </ul> <p><b>Note:</b> All deliverables will be the property of the SADC Secretariat.</p>
2.5 Management	<p>The Expert will report to and will be under the day-to-day supervision the SIBE Programme Coordinator and SADC Senior Programme Officer Finance and Investment. While the host Member State may, at its sole discretion, provide suitable office accommodation, the Expert is expected to make his own arrangements for office accommodation for the duration of the assignment.</p>
2.6 Methodology	<p>The services will be delivered in the following separate but interrelated Parts.</p> <p><b>Part 1: Inception and planning: (5 fee days)</b></p> <p>This Part will begin with an inception and assimilation phase, including a start-up meeting for the Secretariat to brief the STE and to discuss the Assignment as a whole.</p> <p>The STE will complete a brief inception report including methodology for the assignment and make an inception Presentation of the report to the Secretariat.</p> <p><b>Parts 2 &amp; 3– Progress report (40 fee days)</b></p> <p>At the End of Parts 2 &amp; 3, the consultant will submit a progress reports within 2 working days at the end of each Part. as follows:</p> <ul style="list-style-type: none"> <li>- Progress report on development of a Strategy document to guide the Secretariat to showcase investment projects, programmes, and business opportunities. The STE will also produce a roadmap to facilitate the implementation of the recommendation as well as key performance indicators to evaluate the results of the forum. <b>(20 fee days);</b> and</li> <li>- Progress Report on updating the SADC Compendium and profile major investment projects and business opportunities and compile major business opportunities from each Member State <b>(20 fee days)</b></li> </ul> <p>The consultant will make a brief Power Point presentation to the Secretariat of the reports.</p>

	<b>Part 4: Submission of a report</b> highlighting the main deliverables (5 fee days).			
<b>3. Resources allocated</b>				
3.1 Resources from the Technical Assistance contract:				
	Part 1	Part 2	Part 3	Part 4
Up to 50 STE days	5	20	20	5
Up to 15 per diem days (approximate)				
Mobilisation travel				
Regional travel	The STE is expected to arrange his/her own transport in the locations of the Assignment.			
3.2 Other related resources allocated from the SIBE budget				
Translation of documents	The translation of deliverables will be arranged by SADC secretariat separately. It should be noted that a minimum of 5 weeks is required for translation.			
Interpretation	Interpretation when/if necessary will be arranged by SADC secretariat separately.			
	The STEs are expected to utilise their own laptop computers and cellular telephones.			
<b>3.3. Expert profile</b>				
Qualifications and skills	<ul style="list-style-type: none"> <li>• At least a Master's Degree in Economics, Business Management or Development, or any other related area from a recognised institution.</li> <li>• Fluency in English. Knowledge of French and Portuguese will be considered as an asset.</li> <li>• Communication skills.</li> <li>• Report drafting skills.</li> <li>• Task coordination and prioritisation.</li> <li>• Proficient in the use of computers and computer software relevant to the position.</li> </ul>			
General professional experience	<ul style="list-style-type: none"> <li>• Minimum 10 years of general professional experience.</li> <li>• At least 7 years of experience in investment areas within a public or</li> </ul>			

	private sector, regional or international organization.
Specific professional experience	<ul style="list-style-type: none"> <li>• Experience on investment promotion namely showcasing programmes, projects, and investment opportunities.</li> <li>• Sound Knowledge of SADC Coordinated development effort for investment promotion in the region.</li> <li>• Ability to facilitate the skill transfer to enhance capacity in investment promotion in the SADC region.</li> </ul>
<b>4. Location duration and planning</b>	
4.1 Location of work	The Assignment will be carried out from the SADC offices Gaborone Botswana and/or a Member State.
4.2 Duration	<p>The indicative expected start date is <b>1 June 2021</b>.</p> <p>The indicative expected end date is <b>30 September 2021</b>.</p> <p>It is proposed to plan this activity for late in this year when the context of COVID 19 would have become clearer.</p>
4.3 Working week	<p>The working week is from Monday to Friday, except in case of official holidays or SADC closure days as recorded in Annex 1.</p> <p>Weekends are not normally considered as working days unless specifically requested and confirmed in advance in writing by the SADC Secretariat.</p> <p>Regional travel on weekdays for the purposes of the Assignment are working days.</p>
<b>5. Reporting</b>	
5.1 Language	The Assignment language and all reporting are in English.

5.2 Progress reporting

**Submission and approval procedure for inception and progress reports**

All written deliverables shall be submitted in soft copy by email, with Arial font size 12, in a format provided by the Consortium to the STE.

The soft copy must not be in PDF format preventing formatting.

All reports will be submitted to the Consortium through the Programme Coordinator for quality control; then they will be submitted to the KRA Manager for preliminary endorsement, who will then submit them to the SIBE Task Manager with recommendation for approval. Comments to the reports, if any, will be communicated in writing to the STE within 10 working days of receipt of each report.

**Part 1: Inception and planning (5 fee days)**

The STE will complete an inception report and submit it by the end of Part 1. The Report will include a methodology for the Assignment.

At the end of Part 1 the STE will make a brief Power Point presentation to the Secretariat of the inception report.

**Note:** this presentation is a deliverable and should be annexed to the report. The inception report will be submitted by the STE to the Consortium, copied to the Secretariat. The Consortium will formally submit it to the SADC Secretariat (SPO Macro) for approval.

After submission, the Secretariat will consider the report and provide any feedback within 5 working days.

Progress Reports

**On Part 2: Development of the strategy document (20 fee days)**

The STE will complete a report and submit it by the end of Part 2. The STE will make a brief Power Point presentation to the Secretariat of the report.

**Note:** this presentation is a deliverable and should be annexed to the report. The report will be submitted by the STE to the Consortium, copied to the Secretariat. The Consortium will formally submit it to the SADC Secretariat (SPO Finance and Investment) for approval.

After submission, the Secretariat will consider the report and provide any feedback within 5 working days.

**On Part 3: Update the SADC Compendium and profile major investment projects and business opportunities and compile major business opportunities from each MS (20 fee days)**

The STE will produce all required documents and make them ready for showcasing in various forum and investment roadshows. The STE will complete a report and submit it by the end of Part 3. The STE will make a brief Power Point presentation to the Secretariat of the report.

**Note:** this presentation is a deliverable and should be annexed to the report. The report will be submitted by the STE to the Consortium, copied to the Secretariat. The Consortium will formally submit it to the SADC Secretariat (SPO Finance and Investment) for approval.

After submission, the Secretariat will consider the report and provide any feedback within 5 working days.



	<p><b>Part 4: Submission of the report (5 fee days)</b></p> <p>The STE will complete a report and submit it by the end of Part 4. The STE will make a brief Power Point presentation to the Secretariat of the report highlighting the main deliverables.</p> <p>Note: this presentation is a deliverable and should be annexed to the report. The report will be submitted by the STE to the Consortium, copied to the Secretariat. The Consortium will formally submit it to the SADC Secretariat (SPO Finance and Investment) for approval.</p> <p>After submission, the Secretariat will consider the report and provide any feedback within 5 working days.</p>
5.3 End of Assignment Reporting	<p><b>Part 6 - End of Assignment Report (EoAR) and presentation</b></p> <p>The STE will submit the EoAR for approval at the completion of the Assignment. The report shall be submitted in the format provided and will include the following:</p> <ul style="list-style-type: none"> <li>• An executive summary of the whole Assignment.</li> <li>• List of activities carried out during the Assignment.</li> <li>• Any recommendations for further support to the Secretariat and Member States.</li> <li>• As Annexes, all deliverables produced including the completed updated reports.</li> <li>• In addition to the report at the end of Part 5 the STE will make a Power Point presentation to the Secretariat of the EoAR on the last day of the assignment. The presentation is a deliverable and should be annexed to the report.</li> </ul> <p><b>EoAR Submission and approval procedure:</b></p> <ul style="list-style-type: none"> <li>▪ After end of assignment, EOAR will be submitted by email to the Consortium through the Programme Coordinator for quality control; then, it will be submitted to the KRA manager for technical comment for the STE. Technical comments will be issued within 10 working days.</li> <li>▪ The STE shall address all the technical comments within 15 calendar days of receiving comments and submit the final EoAR to SADC for final technical and administrative approval. If no comments are issued by SADC within one month since submission, the EOAR will be deemed satisfactory.</li> <li>▪ Upon acceptance (or if the one-month period has elapsed since submission without comments being issued), the EoAR shall be submitted to the S-KRA manager and the SIBE Task Manager for administrative approval.</li> <li>▪ The Assignment will not be considered complete until the approval of the SIBE Task Manager to the EoAR has been obtained.</li> <li>▪ The EoAR shall be delivered in soft copy. The soft copy shall include deliverables produced as annexes. The soft copy must not be in pdf format preventing formatting.</li> </ul>

**6. Administrative Information**

Timesheets	<p>The STE will complete a monthly timesheet according to the template provided, recording days worked. The STE will additionally be required to sign a daily attendance register at the SADC Secretariat Office in Gaborone.</p> <p>Fees will be due only for working days recorded in timesheets that are countersigned by the SIBE Programme Coordinator, RA Manager, and the Task Manager (SPO Finance and Investment).</p> <p>-</p>
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Travel approval forms	If regional travel is required, the STE will complete a SIBE travel approval form which will be handed to the SIBE Task manager for processing.
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Travel support documents	If regional trips are needed, boarding passes, copies of hotel invoices and other support documents will be handed over to the Consortium through the Programme Coordinator.
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**7. Endorsement**

<b>SIBE Programme Coordinator</b>	<b>RA Manager</b>	<b>Task Manager</b>	<b>Director-Finance, Investment and Customs</b>
Mike Nyamazana	Lisi Razanajaholy	Mario Lironel	S.L. Mtonakutha
Signature:  ..... ...  Date: .....	Signature:  ..... .....  Date: .....	Signature:  ..... ...  Date: .....	Signature:  ..... .....  Date:.....

## **ANNEXES TO TOR 029/KRA1.3/AWP5**

ANNEX 1. Experts scoring grid

ANNEX 2: Botswana official holiday 2021 (non-working/fee days)

ANNEX 3: Gantt chart

ANNEX 4: Estimated budget

**ANNEX 1**  
**Experts scoring grid**

Qualifications and Experience STE1	Points*
Qualifications and skills:	20
At least a Master's Degree in Economics or Development Finance or any other related area from a recognised institution	3
Fluency in English. Knowledge of French and Portuguese will be considered as an asset	3
Management skills	2
Results Orientation	2
Teamwork and interpersonal relationships	2
Communication skills	2
Report drafting skills	2
Task coordination and prioritization	2
Proficient in the use of computers and computer software relevant to the position.	2
General professional experience:	30
Minimum 10 years of general professional experience	15
At least 7 years of experience in investment areas within a public or private sector, regional or international organization	15
Specific professional experience:	50
At least 5 years of experience in at least one of the following: economic policy development, FDI, investment facilitation and promotion, investment law, regional integration	5
At least 3 years of practical, progressively responsible experience in, economic, investment, or legal related field where economic research and analysis are a main feature of the work required	5
Knowledge of the issues and processes involved in regional economic integration and investment climate/conditions, preferably in Southern Africa	10
Sound Knowledge of SADC Coordinated development effort, strengthening and harmonisation of the policy and regulatory framework for investment in the region	10
Experience on facilitating the development and implementation of regional projects/programmes for investment promotion and improvement of business environment	10

Ability to facilitate the implementation of capacity building and training programmes to enhance capacity in investment promotion in the SADC region.	10
Score	100

**ANNEX 2: Botswana Official Holidays – 2020-2021**

<b>Date</b>	<b>Day</b>	<b>Occasion</b>
1 January 2020	Saturday	New Year's Day
2 January 2020	Monday	Public Holiday
10 April 2020	Friday	Good Friday
11 April 2020	Saturday	Public Holiday
13 April 2020	Monday	Easter Monday
1 May 2020	Monday	Labour Day
21 May 2020	Thursday	Ascension Day
1 July 2020	Wednesday	Sir Seretse Khama Day
20 July 2020	Monday	President's Day
21 July 2020	Tuesday	Public Holiday
30 September 2020	Wednesday	Botswana Day
1 October 2020	Thursday	Public Holiday
25 December 2020	Monday	Christmas
26 December 2020	Saturday	Boxing Day
1 January 2021	Friday	New Year's Day
2 April 2021	Friday	Good Friday
5 April 2021	Monday	Easter Monday
1 May 2021	Saturday	Labour Day
13 May 2021	Thursday	Ascension Day
1 July 2021	Thursday	Sir Seretse Khama Day
19 – 20 July 2021	Monday - Tuesday	Presidents' Day
30 September 2021	Thursday	Independence Day
25 December 2021	Saturday	Christmas Day
27 December 2021	Monday	Boxing Day

### ANNEX 3: Gantt Chart

**“Develop a strategy document to guide the Secretariat to showcase SADC investment projects in regional and international investment forum”**

Task ID	Task Description	Duration (days)	Start Date	End Date	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17
1	Inception period	5	10/5/21	14/5/21	X	X															
2	Develop a strategy to prepare and showcase the SADC programmes and projects	20	17-May	14-June			X	X	X	X											
3	Update the SADC Compendium, profile major investment projects and business opportunities for investors' targeting, Investment roadshow events and Investment fora	20	15-June	12-July						X											
4	Submission of the final report	5	13-July	19-July										X							

## **ANNEX 4. Estimate budget**