



**COMMON MARKET FOR EASTERN AND SOUTHERN AFRICA BUSINESS COUNCIL
(CBC) AND CONFEDERATION OF GERMAN INDUSTRIES (BDI)**

SHORT TERM CONSULTANCY

THE DRAFTING OF CBC STRATEGIC PLAN 2023-2025

REQUEST FOR PROPOSALS (RFP)

Ref no: CS/CBC/09(11/22)

Closing Date: 30th November 2022

TERMS OF REFERENCES

<u>PROJECT TITLE:</u>	CBC-BDI Project on Inclusive COMESA Private Sector Participation in the implementation of the African Continental Free Trade Agreement.
<u>Assignment title:</u>	Drafting of CBC Strategic Plan 2023-2025
<u>Contract Duration:</u>	46 days
<u>Duty station:</u>	Home-based, except Board and Staff Workshop, and Field Missions
<u>Travel:</u>	Mainly virtual field missions
<u>Eligibility</u>	Individual Consultant

1. BACKGROUND

The COMESA Business Council (CBC) is a business member organization bringing together a diverse group of enterprises, companies, and Business Associations in the region to inform and influence the policy directions that impact private sector and business community at large in COMESA. It is the recognized regional apex body of the Private Sector and Business Community in the 21 COMESA Member States. CBC seeks to strengthen the inclusiveness of the private sector in regional and global trade. This includes prioritizing specific advocacy strategies to address key business impediments and measures that affect industries and have a direct bearing on the participation of businesses in trading in the COMESA region.

Currently, CBC is implementing CBC Strategic Plan 2018-2022 which is coming to an end this year. There is need to develop another plan to continue guiding CBC in fulfilling its mandate and adapting to changing realities in its operational environment. Due to the dynamic nature of the internal and external environments, it is necessary to develop a Strategic Plan with a shorter time frame i.e, 3 years – 2023-2025.

In the proposed Strategic Plan, CBC will review the implementation of the current Strategic Plan 2018-2022 and the changing landscape for CBC. It will identify strategic focus, issues, objectives and result areas, develop an action/implementation plan, and develop a monitoring and evaluation framework to measure the performance of the Strategic Plan. The new Strategic Plan will seek to reinforce CBC's commitment and approach in addressing members' issues including membership recruitment, membership retention, improving services to members, broadening the membership base, enhancing communication to members and restructuring of members' platform i.e. workgroups. It is expected that the new strategic plan will help CBC to strengthen its membership base and responsiveness to the needs of members. It will also help to strengthen CBC institutional capacity and develop a sustainability plan.

The emergence of Africa Continental Free Trade Area (AfCFTA) is part of the changing trade landscape in Africa. It is important to explore new opportunities under AfCFTA and the growing needs of CBC's members. The Strategic Plan will look at the changing landscape of trade in COMESA, and how CBC can best respond to it.

It is against this background that the CBC, with the support of the Federation of German Industries (BDI), is seeking the services of a professional and competent Individual Consultant to develop a three-year CBC Strategic Plan which will guide and ensure that CBC fulfils its mandate, enable its members tap into emerging opportunities in trade and investment under Tripartite and AfCFTA, and adapt to a changing trade landscape. The expenses for this activity are covered by CBC-BDI Project under both membership drive and Short Term Expert (STE) components.

2. OBJECTIVE OF THE ASSIGNMENT

Broad Objective:

CBC is able to effectively and strategically deliver on its mandate to promote development of the Private Sector in COMESA region.

Specific Objectives:

- (a) CBC to have in place a Strategic Plan (2023-2025), which will guide and ensure that CBC fulfils its mandate.
- (b) CBC is able to adapt to its changing operational environment.

3. SCOPE OF WORK AND TASKS

In order to achieve the above objective(s) of the assignment, the Consultant will undertake the following tasks:

- 3.1 Review the CBC vision, mission, values, objectives, and priorities based on the mandate of COMESA Business Council (CBC)
- 3.2 Review the implementation of the current strategic plan 2018-2022, document lessons learnt, identify gaps and recommend areas of improvement or adjustment.
- 3.3 Conduct a review of stakeholders of CBC and prioritize the critical and relevant ones to CBC.
- 3.4 Conduct a situational analysis including SWOT and PESTEL analysis.
- 3.5 Based on this analysis, identify strategic focus areas, strategic issues, strategic objectives and key result areas;
- 3.6 Propose a plan for achieving the strategic objectives and key results areas.
- 3.7 Review CBC's institutional capacity, organizational set-up, financial and administrative capacity and sustainability against the mandate, the identified strategic objectives, the key result areas, and sustainability. It will include reviewing the capacities of Business Policy and Advocacy, Business Facilitation, and Membership Development units. Thereafter, propose functional, organizational and leadership structure. Also benchmarking with similar organizations.
- 3.8 Propose measures and programs to promote sustainability of the CBC including long term sustainability.
- 3.9 Develop an action/implementation plan that should include key result areas, strategies, activities, baselines and targets, timelines.
- 3.10 Develop a monitoring and evaluation framework for a Strategic Plan to measure its performance and effectiveness including developing result-based framework and Risk Management Framework for implementation of Strategic Plan based on the units.

4 APPROACH AND METHODOLOGY

The Individual Consultant is expected to explain the approach and methodology that will be used to undertake the assignment. The proposed approach and methodology should include, among others, the following: -

- 4.1 **Desk review:** The Individual Consultant is expected to undertake in-depth review of relevant documents, literature and reports including the current CBC Strategic Plan 2018-2022; benchmarking with similar organizations.
- 4.2 **Consultation with staff and Board:** This will be the initial consultation with the Board and staff to review the current operational environment and set priorities for the strategic plan. It will also include holding a strategic planning workshop for Board Directors and staff to generate proposals and inputs that will feed into the draft Strategic Plan.
- 4.3 **Virtual field missions and stakeholder engagements:** The Consultant will be required to undertake consultations with stakeholders.
- 4.4 **Report writing:** The Consultant will draft CBC Strategic Plan 2023-2025 and will work closely with the CBC secretariat.
- 4.5 **Presentation of the reports for validation:** The Consultant will be expected to present the draft report to CBC members at a virtual meeting. A one-day validation meeting will be organized on an agreed date, where the consultant will present the report and incorporate the inputs.

The Consultant is to adopt a systematic and participative approach in reviewing the Strategy.

The process will involve the following key activities:

- (a) A kick-off meeting with the consultant to have the common understanding of the assignment and interpretation of the scope of work, and to achieve the following objectives:
 - Have common understanding on the assignment.
 - Identify any gaps in the SOW and the expected outcomes.
 - Discuss the type and numbers of stakeholders that will need to be contacted during the assignment;
 - Highlight potential challenges in undertaking the assignment.
 - Discuss the necessary logistical arrangements regarding execution of the assignment;
 - Discuss documentation for the assignment .
- (b) A review of the previous Strategic Plan's (2018-2022) achievements, challenges and lessons learnt to inform the formulation of this new Strategic Plan. The above will help in determining the best possible implementation approach and also identify gaps and deficiencies to be dealt with in the new Strategic Plan. The information gathered will also be used to identify the key initiatives that CBC should undertake and the direction it should

pursue in support of its mandate, vision and mission without losing focus on the stakeholders.

- (c) A review of numerous policy and legal documents, sector reports, reports of workgroups, internal reports, studies, and world reports in order to develop a clear understanding of CBC’s operating environment.
- (d) Consultations with staff and Board Directors including organizing preliminary workshop to set priorities.
- (e) Consultations with several external stakeholders. External consultations will involve meetings with our members and partners from the, regional and international development community.
- (f) Drafting of the Report: The Individual Consultant will draft the CBC Strategic Plan 2023-2025 and will work closely with the CBC secretariat.
- (g) Organising a validation workshop for presentation of the draft report.
- (h) Development of the final report, as informed by the validation meeting

5 PERFORMANCE PERIOD AND OUTPUTS

The performance period for the assignment is from the date of signing of the contract, for a period of 46 days.

6 DELIVERABLES

The Consultant will deliver as follows:

- (a) Development of an Inception Report
 - Background – Objective and description of the consultant’s understanding of the tasks;
 - Approach and Methodology – Explain approach and methodology, data collection and interview questions;
 - Workplan – Sequencing of the activities with timelines including meeting schedules and virtual field visits;
 - Report format/structure.
- (b) Facilitate a consultative workshop for Board members and Staff.
- (c) Facilitate consultative meetings with members, partners, and other stakeholders.
- (d) Draft strategic plan 2023-2025.
- (e) Facilitate stakeholders’ validation workshop.
- (f) Revised Strategic Plan 2023-2025.
- (g) Final Strategic Plan 2023-2025.

7 TIMELINES FOR UNDERTAKING THE ASSIGNMENT

The table below shows the expected outputs and the timeline for the assignment.

Output	Description	Period	Location Details
Inception report	Writing and submission of inception report	5 days after the start of the assignment	Home based
Facilitating Consultative workshop	Pre consultation with staff and Board	2 days of pre consultation	Physical meeting
Draft Strategic Plan 2023-2025	Undertaking virtual field work including meeting with staff	24 days after inception report	Home based

	and CBC Board and also members.		
	Writing strategic plan, Submission of draft strategic plan to CBC	10 days	Home based
Draft Strategic Plan 2023-2025 to be presented to Stakeholders	Presentation of the draft Strategic Plan to stakeholders for validation and capturing additional/final inputs	1 day	Home based
Revised Strategic Plan 2023-2025	Revising Strategic Plan incorporating inputs submitted from the validation workshop	2 days after the validation workshop	Home based
Final Strategic Plan 2023-2025	Finalising Strategic Plan in accordance with the requirements of the contract	2 days	Home based
Total		46 days	

8 PAYMENT SCHEDULE

The budget ceiling for this assignment lump sum is USD 11,500. Individual Consultants are encouraged to submit their proposals indicating their competitive fees. This amount entails professional fees only.

Payment to be made according to the payment schedule on the table below:

Output	Payment Schedule	
Inception report Approved	10% Payment	
Draft Strategic Plan 2023-2025	30% Payment	
Presentation of Draft Strategic Plan 2023-2025 to the validation workshop	N/A	
Revised Strategic Plan 2023-2025	60% Payment	40% Payment
Final Strategic Plan 2023-2025		20% Payment

9 QUALIFICATION OF THE CONSULTANT

The Individual consultant must possess the following minimum qualifications:

- Master's degree in Economics, Economic Development, Business Administration, Business Management, Project Management, or any other relevant field.
- Additional qualifications and/or experience in Strategic Management is an advantage.
- 5 years' experience in developing and managing strategic planning process, including ability to formulate strategic plans, implementation plans, work plans and budgets and linking implementation plans and budgets to strategic plans.
- Experience in undertaking similar assignments in the private sector, regional and/or international organisations is an advantage.
- Knowledge of and experience in the private sector, especially working with Business Membership Organisations.
- Good understanding of the COMESA region.

Language Requirements:

Proficiency in written and spoken English.

10 EVALUATION CRITERIA AND PAYMENT MODALITIES

The Individual Consultant is expected to submit standard technical and competitive financial proposals. The Individual Consultant will be evaluated against a combination of technical and financial criteria. The Individual Consultant should score a minimum of 70% of the 100% technical grade which will then qualify the Individual Consultant for the next stage of financial grading. Both financial and technical scores will be added for the final grade.

To assist in the examination, evaluation and comparison of proposal, CBC may ask the Consultant for clarification of their Proposal. The request for clarification and the response shall be in writing and no change in price or substance of the Proposal shall be sought, offered or permitted.

CBC will examine the Proposals to determine whether they are complete, whether any computational errors have been made, whether the documents have been properly signed, and whether the Proposals are generally in order.

Arithmetical errors will be rectified on the following basis: If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If the Individual Consultant does not accept the correction of errors, its Proposal will be rejected. If there is a discrepancy between words and figures, the amount in words will prevail.

Prior to the detailed evaluation, the Procurement Committee will determine the substantial responsiveness of each Proposal to the Request for Proposals (RFP). For purposes of these Clauses, a substantially responsive Proposal is one, which conforms to all the terms and conditions of the RFP without material deviations. CBC's determination of a Proposal's responsiveness is based on the contents of the Proposal itself without recourse to extrinsic evidence.

A Proposal determined as not substantially responsive will be rejected by the CBC and may not subsequently be made responsive by the Individual Consultant by correction of the non-conformity.

The bids will be evaluated as follows:

- The email that has technical and financial offers will be opened.
- The "TECHNICAL PROPOSAL" will be opened and evaluated.
- If the technical proposal is evaluated as 70 per cent or above, the "FINANCIAL PROPOSAL" will be opened.
- The Individual Consultant that has offered what is adjudged to be the best technical and financial offer will be offered the contract.
- If the Individual Consultant that offered what was adjudged to be the best technical and financial offer declines to accept the offer, then the Individual Consultant that is adjudged to have offered the second best technical and financial offer will be offered the contract.

In evaluating the relative merits of Individual Consultant's bidding for the project, the evaluation panel will consider:

- Understanding of the terms of reference and requirements of the assignment (15%),
- Demonstrated experience of the Individual Consultant and sample of past assignments carried out by the Individual Consultant in the field of study at regional level (COMESA) (25%),
- The proposed approach and methodology to be applied by the Consultancy Individual Consultant, including workplan with timelines (35%),
- Qualification, competence and relevant experience of Individual Consultant (25%).

11 REPORTING AND MANAGEMENT

The Individual Consultant will work under the direct supervision of the Business Policy Program Manager and under the overall management of the Chief Executive Officer.

- The Chief Executive Officer will provide quality assurance and ensure that the documentation produced is reviewed and approved.
- The Chief Executive Officer will ensure that the Individual Consultant receives all relevant documentation with respect to CBC Guidelines, Rules and Regulations necessary for the execution of his/her tasks.

12 CONTRACT

A formal contract specifying the scope of the assignment shall be prepared and signed between the Secretariat and the Individual Consultant prior to the beginning of the assignment. The contract shall also clearly spell out the responsibilities of the two parties.

13 PAYMENT PERIOD

The period for payment shall be 30 days from acceptance of the report, based on the payment outputs.

14 PRICING

All prices MUST be indicated in USD. There will be a no price variation of the contract after signing of contract except upon a mutual written agreement between the two parties. Prices must be exclusive of all taxes within Zambia.

15 AWARD OF CONTRACTS

COMESA Business Council reserves the right to wholly or partially reject or award this contract to any bidder and has no obligation to award this contract to the lowest bidder.

16 CLOSING DATE OF PROPOSALS

Proposals must be emailed to the COMESA Business Council Secretariat on or before **30th November 2022** at latest by **23.00hrs, CAT**.

17 REJECTION OF PROPOSALS

Any proposal received by the Secretariat after the closing date and time shall be rejected.

18 TECHNICAL QUERIES

For any technical queries related to the specifications of work or TORs, kindly contact: procurement@comesabusinesscouncil.org

19 DISCLAIMER

COMESA Business Council does not bind itself to accept any proposal and reserves the right to accept the whole or partially any of the submitted proposals.

The Chairperson- Procurement Committee
COMESA Business Council
COMESA Secretariat Building, Ben Bella Road
P.O. Box 30051 Lusaka, Zambia.
Tel: (260) 211 229725.

a) The Technical Proposal should include the following:

- Updated profile of the Individual Consultant including a CV;
- Detailing his/her understanding of the task and highlighting experience and expertise in similar works as well as a detailed approach and methodology for carrying out the assignment including an outline of the supporting documents/ projects and their references;
- Copies of academic and professional qualifications of the consultant.

b) The Financial Proposal shall be in line with No. 10 and No. 14 of this RFP.