

Data Collection and Analysis for the Diagnostic Component of the Ethiopia Freight Logistics Masterplan

Terms of Reference

1. BACKGROUND

As part of the support it provides to the Logistical Transformation Office, which is part of the Ethiopia Maritime Authority, which is part of the Ministry of Transport and Logistics, in implementing components of the National Logistics Strategy, the Ethiopian Transport and Logistics Support Programme has been requested to carry out an Ethiopian Logistics Masterplan Diagnostic Study.

The Diagnostic Study will be done by both international and locally employed consultants. These consultants will liaise with staff of relevant Ministries, Agencies, Cooperatives, Transport Associations, etc. The Diagnostic Study will be overseen by the Head of the Logistics Transformation Office (LTO), who may convene a steering committee to provide guidance and advice to the team doing the implementation of the diagnostic phase.

The Diagnostic Study will be carried out in the framework of the EU-financed Ethiopian Transport and Logistics Support Programme (ETLSP) and will be led by the Project's Team Leader (KE1). He will be assisted by the Senior Transport Expert (KE2) on the EU-financed ETLSP.

The Diagnostics Study will be supported by a Data Collection and Analysis component, the design of which is the subject of the current Terms of Reference.

One of the primary tasks of the overall Diagnostic is to prepare a detailed dataset on the logistics sector that can then be used to prepare both a State of Logistics publication as well as to provide input to the Ethiopian Logistics Masterplan. Most of this data collection, which ranges from doing literature reviews to collection of data on transport systems, from border posts, freight movements, movements of agricultural production, warehouse locations and specifications, etc. will be done in the framework of a Data Collection and Analysis assignment. As this work is highly specialised and composed of various smaller deliverables, it is proposed to use a negotiated procedure, to be funded by a specific lumpsum line under the project budget, which will be specifically established to carry out this activity. In this way, the assignment can be managed by outputs rather than by inputs.

2. OBJECTIVES OF THE ASSIGNMENT

The objectives of the Diagnostic Study are to carry out a diagnostic of the Ethiopian surface (land and sea) freight logistics sector, which will include transport and transit corridor logistics as well as domestic freight logistics in Ethiopia. The primary objective is to provide information and statistics on surface-based freight logistics in Ethiopia that can be used by the team of experts who will do the Logistics Masterplan and Implementation Plan. The Implementation Plan will comprise Business Plans for investment opportunities in the Logistics Sector.

The specific objective of this assignment is to collect data required for detailed analysis of the various Logistics Sectors.

3. INDICATIVE SCOPE OF ACTIVITIES

The contract awarded to what is termed the Data Collection and Analysis will be based on deliverables and the contractor will be paid on deliverables rather than on inputs. As part of the proposal, the

provider will provide the contracting authority with a methodology that will be used and timing of deliverables. The expected main activities of the Data Collection and Analysis component will be:

- **Local travel:** The Data Collection and Analysis activity will require a minimum of two trips to the borders at Galafi, Dewele, Tog Wajaale and Moyale. In addition, at least one trip will be done to all major towns in all major regions (with the possible exception of some regions, depending on security and political issues).
- **Literature reviews:** The Data Collection and Analysis activity will collect as many as possible of the major studies, academic papers, consultancy reports, government publications, magazine articles, periodicals and other literature that have been produced on the topic of freight logistics in Ethiopia and, where relevant, other Horn of Africa Countries. A short precis of these documents will be provided.
- **Interviews:** The Data Collection and Analysis activity will be responsible to collect data, information and intelligence (where data are individual observations, information is a useful collection of data and intelligence combines information to form a predictive narrative that enables better decision-making) from people working in the freight logistics sector through structured and unstructured interviews.
- **Surveys:** The Data Collection and Analysis activity will also collect data and information through surveys using questionnaires implemented through physical contact, over the telephone and over the internet.

4. ANTICIPATED MAIN OUTPUTS FROM THE ASSIGNMENT

The main outputs from the Data Collection and Analysis activity are defined in the section below. Providers will be requested to propose a detailed methodology and a calendar for the delivery of outputs.

Providers may propose a new division for the delivery of the below-described outputs, depending on the sequential order that would make sense according to their methodology. The final grouping of the deliverables has to be approved by the EUD before the implementation of the assignment takes place. Disbursement of the funds corresponding to this assignment's components will be subject to the approval of the deliverables by the project team and the EUD.

Deliverable 1:

- Searchable database of all Ethiopian stakeholders in the Logistics Sector. The database will also be sortable by each column of data.
- Minutes of the Stakeholder Meetings.
- A table listing all legal and regulatory instruments that govern or affect the logistics sector and summaries of these instruments.
- Sketch maps of the border posts and write ups of interviews held.

Deliverable 2:

- Log-book data for 3 months from 20 truck drivers on the Ethiopia-Berbera corridor carrying containerised cargo.
- A report outlining the findings of the survey of Clearing Agents and Freight Forwarders.
- BPA Diagrams for imports by road through Djibouti ports and Galafi border post to Modjo ICD for containers.
- BPA Diagrams for imports by road through Djibouti ports and Dewele border post to Modjo ICD for containers.

- BPA Diagrams for imports by rail through Djibouti ports and Dewele border post to Modjo ICD for containers.
- BPA Diagrams for imports by road through Berbera port and Tog Wajaale to a selected destination in Ethiopia for containers.
- BPA Diagrams for imports through Port Sudan to a selected destination in Ethiopia for containers.
- BPA Diagrams for imports through Mombasa port and Moyale to a selected destination in Ethiopia for containers.
- BPA Diagrams for imports of wheat, fertiliser, building steel (rebar) and coal through Djibouti ports to selected destinations in Ethiopia.
- BPA Diagrams for exports of coffee, vegetables and fruits, metals and minerals, apparel, oil seeds and live animals.
- Minutes of the Stakeholder Meetings.

Deliverable 3:

- Report on the number of trucks by category, condition and suitability, by ownership of the truck fleet used to transport freight domestically as well as to and from the ports.
- Annual estimates over the last 10 years of the total production and consumption for each agricultural zone of food crops.
- Estimates of annual agricultural inputs used over the last 10 years (including fertiliser, pesticides, herbicides, seed, bags, etc.), in each agricultural zone.
- Estimates of livestock production and inputs used in each agricultural zone (to be defined) for the previous 10 years.
- Supply and value chains for all major food crops, (including wheat, barley, tef and maize).
- Value chains for livestock production.
- A list of all fertiliser warehouses and their map coordinates. (Note: This will be used to construct a map with all the warehouses located on the map. When the user clicks on a specific warehouse on the map a box giving details of the warehouse and the warehouse statistics will appear as a pop-up.
- Report on the physical status of the 110 warehouses, equipment available and warehouse management systems used.
- Report on monthly flows of fertiliser for the last 10 years.
- Estimates of the average time, by month, it takes for a truck to unload fertiliser at each depot.
- Estimates of annual fertiliser losses for the last 10 years.
- Map coordinates of all operational and planned Industrial parks.
- Completed template for each IP on amenities, infrastructure, tenants, and services.
- Minutes of the Stakeholder Meetings.

Deliverable 4:

- Report giving the coordinates of all major non-agricultural warehouses and Dry Ports in Ethiopia, giving a brief description of: the ownership of the facility; the facilities' tenants; the capacity of the facility; the facilities available at the warehouse, including air conditioning (or cold room) facilities; the mechanical equipment available, including reach stackers, gantry cranes, fork lifts, tractors, etc.; the size (in square metres) and storage capacity (in metric tons and/or TEUs) of the warehouse or Dry Port; and the services available (such as destuffing, Customs clearance, etc.) at the warehouse or ICD.
- Minutes of the Stakeholder Meetings.

Deliverable 5:

- A table of best estimates of the total production, domestic consumption and exports of metals and minerals mined in Ethiopia.
- Supply and value chains for gold, tantalum, potash and soda ash and industrial and construction materials.
- Map coordinates of the location and distribution centres of mineral products.
- Report on the logistics requirements of mineral supply and value chains from source (origin) to destination.
- Minutes of the Stakeholder Meetings.

Deliverable 6:

- Final Report, which will be a compilation of Deliverables 1 to 5

5. MANAGEMENT AND COORDINATION

The Data Specialist will report directly to the KE2 of the Ethiopia Transport and Logistics Support Programme.

6. RESOURCES REQUIRED

As this work is highly specialised, requiring in-depth local knowledge and expertise in freight and other logistics, entails specific institutional skills, and is composed of a set of smaller deliverables, it is proposed that a negotiated procedure, to be funded through a lumpsum budget, be agreed.

The costs of all administration, travel, daily subsistence allowance, translation from Amharic to English, printing, telecommunication and wifi costs and all other costs are covered under the lump sum amount of this assignment. Therefore, no additional costs may incur from other budget lines of the contract, such as the incidental expenditures budget, related to the above-described assignment.

7. DURATION OF THE ASSIGNMENT

This assignment is anticipated to start in September 2022 and will be implemented over a period of 6-9 months, up to mid-2023.