REQUEST FOR EXPRESSIONS OF INTEREST

AFRICAN DEVELOPMENT BANK
Immeuble CCIA, Abidjan, Côte d’Ivoire
African Natural Resources Center
E-mail: M.HARRATHI@AFDB.ORG Telephone: +225 20 26 32 13

AN ASSESSMENT OF DEVELOPMENT MINERALVALUE CHAINS AND POLICY OPTIONS FOR ENHANCING THE CONTRIBUTION OF THIS SECTOR TO ECONOMIC DEVELOPMENT IN RWANDA

1. The African Natural Resources Centre of the African Development Bank hereby invites consulting firms to express their interest in the following Assignment: Consultancy Services for an “Assessment of Development Mineral Value Chains and Policy Options for Enhancing the Contribution of this Sector to Economic Development in Rwanda”.

2. The services to be provided under the Assignment:
Under the supervision of the AfDB project team, and in coordination with the focal point in Rwanda, the selected Consulting firm will carry out value chain analysis of Development Minerals in Rwanda in order to provide policy options and recommendations for implementation.

3. The African Natural Resources Centre invites consulting firms to indicate their interest in providing the above services. Interested consulting firms shall provide information on their qualifications and experience demonstrating their ability to undertake this Assignment (documents, reference to similar services, experience in similar assignments, etc.).

4. The eligibility criteria, the establishment of a short list and the selection procedure shall be in conformity with the Bank’s Procurement Policy for Recruitment of Corporate Consultants, available on the Bank Website at https://www.afdb.org/en/projects-and-operations/procurement/resources-for-borrowers/policies-procedures. Please, note that interest expressed by a consulting firm does not imply any obligation on the part of the Bank to include the firm in the shortlist.

5. The estimated duration of the Consulting Services is 4 calendar months (However, Firms are advised to field 2 experts for the assignment as provided in the TOR. Each expert will spend not more than 50 man days) and the estimated starting date is July 15, 2020.

6. Interested Consulting firms may obtain further information at the address below during the Bank’s working hours: 08:00 – 17:00
7. Expressions of interest must be received by E-mail to the address below no later than 3rd June at 17:00 Hours Abidjan local time and specifically mentioning Expression of Interest: Consultancy Services for Evaluation of Industrial & Construction Minerals Value Chain and Policy Implications to Enhance their Economic Contribution to Rwanda’s Development

For the attention of:
Ms. Maali HARRATHI

E-mail: M.HARRATHI@AFDB.ORG

Any questions and requests for clarifications may be sent to: JERRY AHADJIE (J.AHADJIE@AFDB.ORG)
1. Introduction

The African Natural Resources Centre (ANRC) is a non-lending entity of the African Development Bank (AfDB). The AfDB established the Centre to support Regional Member Countries (RMCs) to maximize development outcomes from their natural resources. The ANRC generates high quality knowledge and conducts impactful policy dialogue on harnessing natural resources for accelerated sustainable development in Africa. It also provides technical support to RMCs on natural resources planning, investment and governance, with a focus on land, forestry, fisheries, water, oil, gas and minerals. The ANRC also informs the Bank’s operational work in the natural resources sector.

The ANRC now seeks to generate knowledge to help inform policymaking, planning and investment in the Industrial and Construction Minerals sector of Rwanda for accelerated socio-economic development. The ANRC seeks to recruit a Firm or Think Tank to undertake consultancy services for “Evaluation of Industrial and Construction Minerals value chain and policy implications to enhance their contribution to Rwanda’s development”.

2. The Need for Industrial and Construction Minerals Value Chain Study in Rwanda

The mining of Development Minerals has important implications for sustainable development, however, they have to date received inadequate attention for their potential to impact livelihoods. Often referred to as Low Value Minerals and Materials (LVMM) due to their low price as a function of their weight, and their relatively low value to international commodity markets, Development Minerals provide crucial inputs for domestic economic development (infrastructure, manufacturing, construction and agriculture to name a few) and have the potential to be high value in terms of national development. In comparison to the metals sector, Development Minerals have closer links with the local economy, and have the potential to generate more local jobs, with a greater impact on poverty reduction. This is partly because the sector is dominated by small and medium scale domestic businesses.

According to the United States Geological Survey, the most prominent minerals mined in Rwanda are tin ore (cassiterite), tungsten ore (wolframite) and tantalite (coltan), styled as the 3Ts. Aside the 3Ts, Gold and other gemstones are also mined. Other mineral occurrences under exploration include diamonds, rare earth elements, amphibolite, granites, quartzite, clay minerals, sand and gravel.

Rwanda’s mining sector is considered one of the key sectors with potential to contribute to socio-economic development. In 2018 the mining sector contributed 2.5% to GDP and US$346 million as merchandise export earnings. Based on historical and current trends, the government’s aim is to accelerate the mining sector’s export contribution to US$1.5 billion by 2024. The Government anticipates accomplishing this by, among others, doubling exports from the 3T’s from US$142 million to US$300 million in 2024 and to advance the export earnings from other minerals including gold.

Based on the existing mineral resources and the envisaged potential role in the domestic economy, Rwanda’s current 30-year Vision (Vision 2050) has identified mineral resource development as one of the strategic pathways of transforming the economy. In line with this, Government intends to diversify production from the dominant 3Ts to development minerals which have critical roles in infrastructure development as well as spawning other industries in the domestic economy.
According to the African Development Bank’s Africa Economic Outlook (AEO, 2020), Rwanda’s real GDP growth for 2019 was estimated 8.7%, higher than the regional average. Growth was mainly in services (7.6%) and industry (18.1%), particularly construction (30%). Before COVID-19 impacts to the global economies, the African Development Bank projected Rwanda’s growth at 8.0% in 2020 and 8.2% in 2021, supported by continuing large-scale investments such as the Bugesera airport, Hakan Peat plant, and electricity infrastructure. Rwanda’s rapid growth, coupled with a focus on the business environment, can stimulate growth in private investment, currently low at 13% of GDP compared with the East African average of 16%. Foreign direct investment averages 3% of GDP, compared with the low income country average of 3.3%.

The above positive economic trend encourages accelerated investment especially in the construction sector. Based on the plans of cities in Rwanda, high rise buildings are a priority and this will demand the use lightweight materials especially glass products. From the analysis of the housing demand in Kigali City, by year 2022, over 458,000 new buildings from low cost housing to premium housing are required (Kigali City Housing Study Report, 2012). Rwanda is also increasingly importing various glass products which were in 2014 estimated at around 3.4 billion of Rwandan Francs. It is therefore evident that the demand for glass products is increasing dramatically. Thus, investment in glass manufacturing is expected to address Rwanda’s importation of glass from abroad. All these point to the fact that development minerals will be essential in transforming Rwanda’s infrastructure base and contribute to the economy as a whole.

It is against this backdrop that the Government of Rwanda (GoR) approached the African Development Bank to assist in conducting value chain assessment of development minerals to unlock their role in the country’s socio-economic development.

3. Objective
The overall objective of the study is to assess development mineral value chains in Rwanda with a view to identifying opportunities and challenges of harnessing this sector to accelerate Rwanda’s socio-economic development. The specific objectives of the study are to:

a) Assess the current status of development mineral value chains in Rwanda: (geological endowment, economic and investment potential, production, consumption and trade, firms, suppliers, financiers, technologies etc.)
b) Identify economic and investment opportunities and challenges for value addition in the sub-sector; and
c) Make recommendations on policy and other incentives necessary to enhance the contribution of the sub-sector and its value chain to economic development in Rwanda.

4. Scope of Work
The scope of the assignment includes the following:
a. Review literature on development minerals in Rwanda;
b. Profile the range of development minerals currently mined in Rwanda (minerals, digital location, labour, production volumes, etc.);
c. Identify and conduct value chain analysis of development minerals in Rwanda: current state of value chain and opportunities for import substitution;
d. Assess institutional and technical operating context;
e. Assess the market characteristics of the development minerals in Rwanda;
f. Identify constraints to the development of the sector: costs, skills, regulatory environment etc.
g. Analyse the key factors influencing success of development minerals value chain and investment opportunities in Rwanda (reserves, grade, demand, finance, infrastructure etc.);
h. Analyse the potential socio-economic impacts of the development mineral value chain based on the identified mineral resources;
i. Analyse the potential market for value added products of development minerals within Rwanda and the East African Community; and
j. Develop policy recommendations and implementation plan to support and enhance the economic and investment potential of Rwanda’s development minerals.

5. Deliverables:
A comprehensive value chain analysis report based on the scope of the study will be submitted at the end of the study.

There will be an inception meeting with the Consortium /Firm to agree on the methodology, scope and coverage of the analysis, reporting format and content of the draft and final reports.

6. Timeframe
The duration of the assignment is 4 calendar months. However, the Firm will be expected to field two experts who will work for no more than 50 days each. The table below details the activities and outputs.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Output</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Consultant Recruitment</td>
<td>Consultant Recruited</td>
<td>6 Weeks</td>
</tr>
<tr>
<td>1 Pre-project meeting with the selected Consultant</td>
<td>Agreed methodology, work plan, formats and report template</td>
<td>1 weeks after signature</td>
</tr>
<tr>
<td>2 Submit progress report on the assignment</td>
<td>Key challenges highlighted and mitigation strategies adopted</td>
<td>8 weeks after signature</td>
</tr>
<tr>
<td>3 Provide first draft of report for review by ECNR and partners</td>
<td>Draft report reviewed by the ECNR and a team of internal and external peer reviewers</td>
<td>12 weeks after signature</td>
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<tr>
<td>4 Provide revised draft reports</td>
<td>Revised reports submitted and approved by the Centre</td>
<td>15 weeks after signature</td>
</tr>
<tr>
<td>5 Consultant’s report consolidation</td>
<td>Final report</td>
<td>18 weeks after signature</td>
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7. Requirements of the Firm/Think Tank
The study will be carried out by an organisation, which could be a private company, research centre or think-tank, with the requisite knowledge and practical experience in the minerals and mining sector of Africa, especially in East and Central Africa. The organisation should have expertise in the following fields, inter alia: mineral resources management, industrial and construction mineral resources value chains and Artisanal and Small Scale Mining (ASM). The organisation must be registered in a member country of the African Development Bank and should have been in existence for at least five years. A track record in preparing strategic and policy-related studies in African countries and previous experience relating to studies in mineral value chain analysis will be an advantage. Due to restrictions to travelling that may extend through quarter 3 of the year, experience with virtual data acquisition through online questionnaires and telephone/video interviews is highly recommended.

The organisation should be able to field at least two (2) appropriate experts to produce the deliverables as outlined above. However, it is expected that the organisation will draw from its internal resources to support the experts where required.
7.1. Qualification of Experts
(a) Lead Expert:
- Possess minimum of a Master’s degree in mining, mineral economics, natural resources management or other relevant disciplines. A Doctorate degree is an advantage;
- At least 10 years’ experience in research, policy analysis and/or technical advisory related to industrial minerals sector in Africa;
- At least two focused projects/studies in development minerals;
- Experience in development of investment promotion materials
- Experience in Mineral Trade, especially development minerals is an advantage
- Experience with multi-method research techniques, including key informant interviews, document analysis, and data triangulation from quantitative and qualitative sources;
- Experience in conducting value chain analysis and designing industrial policies in Africa will be an added advantage; and
- Excellent written and oral English or French.

(b) Geoscientist:
- Possess minimum of a Master’s degree in geological and/or mining engineering, or other relevant geoscientific disciplines. A Doctorate degree is an advantage;
- At least 10 years’ experience in research, policy analysis and/or technical advisory related to industrial minerals sector in Africa;
- Experience in conducting value chain analysis and designing industrial policies in Africa will be an advantage;
- Demonstrated experience with the UN resources management system and the UN resources classification framework or similar resources management and classification systems in the mining industry;
- At least two focused projects/studies in Development Minerals;
- Experience with multi-method research techniques, including key informant interviews, document analysis, and data triangulation from quantitative and qualitative sources; and
- Excellent written and oral English or French.

8. Firm/Think Tank Selection
The Firm will be selected in accordance with the African Development Bank’s Implementation Manual relating to the Procedures for Acquisition of Consulting Services funded by the Administrative or Capital Expenditure Budget of the Bank Group. The candidates shall be evaluated based on the following criteria:

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>Marks (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding of the Terms of Reference and Methodology:</td>
<td>20</td>
</tr>
<tr>
<td>a) Technical and methodological approach; and b) Work plan</td>
<td></td>
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<tr>
<td>Qualifications of key personnel a) Team leader, b) Geoscientist</td>
<td>30</td>
</tr>
<tr>
<td>Experience relevant to the assignment: Experience in: a) mineral resources management, development minerals value chains and Artisanal and Small Scale Mining (ASM) c) knowledge of the region (location of the assignment) d) Experience working with the AfDB or similar multilateral Organisations</td>
<td>40</td>
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<tr>
<td>Language and communication skills: Ability to deliver project outputs and effective communication in English and French</td>
<td>10</td>
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<tr>
<td>TOTAL</td>
<td>100</td>
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Applicants are to submit a brief technical proposal in line with the objective and scope of work.

9. Service Conditions
   The African Development Bank conditions for retaining short-term consultants will apply.