

TERMS OF REFERENCE FOR EXPERTS

Action code and partner country: SOCIEUX+ 2019-24 WGB

Action title: Vulnerability assessment of the CTP beneficiaries

Activities number and title:

Activity 1: Identifying different forms of vulnerability and multi-dimensional poverty among the beneficiaries of the CTP

Partner institution: Ministry of Social Development (MoSD) of the Palestinian Authority (PA)

Date of implementation of activity: Activity 1: 15 June – 3 July 2020

Date of activities:

Activity 1: 15 June – 3 July 2020

Activity 2: 3 – 10 August 2020

Activity 3: 7 – 18 September 2020

Version - #: 1

Draft

Final

Date: *February 3rd, 2020*

SOCIEUX+ is implemented by

Partnership led by:

Co-financed by the European Union



About SOCIEUX+

The European Union (EU) promotes and maintains dialogue on social protection and inclusive employment policies with an increasing number of partner countries. This effort has been confirmed in the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development Our World, our Dignity, our Future". A significant number of cooperation activities in different countries related to these fields are funded by geographic or thematic instruments. However, a gap had been observed in the EU cooperation with third countries with regard to providing support to short-term measures and peer-to-peer cooperation to promote the development of social protection.

SOCIEUX+ - EU Expert Facility on Employment, Labour and Social Protection – (hereafter: "the Facility" or "SOCIEUX+") is a technical assistance facility set-up and co-funded by the EU (through the EC's Directorate for Development and Cooperation - EuropeAid), France, Spain and Belgium and implemented by a partnership composed of four partners: Expertise France, leader of the implementation Partnership (hereafter: "the Partnership"), the Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP), Belgian International Cooperation on Social Protection (BELINCOSOC) and Belgian Cooperation Agency (ENABEL).

The general objective of the facility is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries.

The specific objective is to enhance the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through peer-to-peer short-term technical assistance and knowledge development.

SOCIEUX+ supports the efforts of Partner Countries (PCs) of the EU in the reform, development and extension of their social protection systems and the strengthening of labour & employment policies. The Facility aims at enhancing the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through peer-to-peer short-term technical assistance and knowledge development. SOCIEUX+:

- Recognises the impact of social protection and employment in reducing poverty and vulnerability;
- Supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems;
- Complements the efforts made through other European Union initiatives.

SOCIEUX+ makes European expertise quickly available with minimal transaction costs for partner institutions. It draws on the expertise of public or mandated bodies, non-governmental organisations, and relevant civil-society organisations of EU Member States and international specialised organisations. It can also support South-South and triangular cooperation through the mobilisation of practitioners from partner countries. SOCIEUX+ is operational since September 2016.

The Facility is an expansion of SOCIEUX - Social Protection European Union Expertise in Development Cooperation -, which was established in 2013 and progressively incorporated.

1 BACKGROUND INFORMATION

1.1 Country overview

The Palestinian National Authority (PNA) is currently located in Ramallah. The entirety of territory claimed by the PNA has been occupied by Israel since the Six-Day War in 1967. Presently, most of the West Bank is administered by Israel though 42% of it is under varying degrees of autonomous rule by the PNA. The term "Palestinian territories" has been used for many years to designate those lands. More recently, the official United Nations terminology has been used, Occupied Palestinian Territory (OPT) increasingly replacing other terms since 1999. The European Union also has adopted this usage.

The lack of peace and reconciliation on the political horizon has created an unsustainable economic situation in the West Bank and Gaza. Even though donor aid had increased government-funded services and fuelled consumption-driven growth from 2007 to 2012, this model of growth has proved unsustainable. The humanitarian context in West Bank and Gaza remains directly tied to the impact of the Israeli occupation. Restricted movement of people, access to resources and basic social services, together with recurrent expropriation of land, settler violence, civil unrest and periodic large-scale armed hostilities have resulted in economic stagnation, high unemployment, poverty and food insecurity.

The OPT's HDI value for 2017 is 0.686— an increase of 4.4% in the last ten years, which put the country in the medium human development category, positioning it at 119 out of 189 countries and territories.

1.2 Sector situation

The Palestinian Central Bureau of Statistics (PCBS) currently sets the poverty line and deep poverty line for a reference household of five (two adults and three children) to ILS 2,470 and ILS 1,974 per month, respectively.

According to the 2017 poverty survey carried out by PCBS, the poverty rates trend worsened in Gaza to 53% compared to 38.9% in 2011 and improved in the West Bank reaching 13.9% compared to 17.6% in 2011. Deep poverty increased in Gaza from 21.1% in 2011 to 33.7% in 2017 and decreased in the West Bank from 7.6% in 2011 to 5.8% in 2017.

1.3 Role of partner institution in sector

The Ministry of Social Development (MoSD) of the PNA is responsible for implementing the Social Development Strategy (SDS) for the period 2017-2022, in line with the National Policy Agenda 2017-2022, as well as with the commitments towards the international conventions and the SDGs 2030. The National Policy Agenda puts poverty reduction and service delivery at the core the government's responsibility. As such, MoSD is responsible for the overall sector strategy, including initiatives implemented by other Ministries, such as the Ministry of Health and the Ministry of Education.

The SDS puts forward a comprehensive social development approach ensuring that the right to social protection for the most vulnerable individuals is guaranteed - in particular women, children, elderly, and person with disabilities - applying a rights-based approach. Its vision is to achieve: *"a strong, solidary, productive and innovative Palestinian society that provides dignified life for all its members, unleashes their potential and believes in rights, equality, justice, partnership and integration"*. In that perspective, SDS adopts 4 strategic objectives: 1) Reduce the poverty rate; 2) Remove all forms of social exclusion and marginalization in the Palestinian society; 3) Consolidating complementarity in social development policy, in line with SDGs 2030 and other international standards and conventions; 4) Local development groups lead sustainable development initiatives in the marginalized villages and neighbourhoods.

For the period 2017 – 2019, an Operational Management Plan has been established and MoSD's responsibilities clearly stated. While MoSD steers the Plan's execution, the activities it comprises are actually implemented by the 16 regional offices, 11 of which are located on the West Bank and 5 in the Gaza Strip. The main activities regard granting monetary benefits for poor households, people with disability, children and elderly (mainly through the Cash Transfers Programme), but also to enhance economic empowerment, especially for vulnerable and marginalized sectors of the Palestinian society. Also, a Strategic Results Framework (SRF) has been made available to monitor

the sector's progress and to report to the Cabinet Secretariat. The SRF reports, among other things, on the number of families receiving cash transfers or other type of assistance from MoSD, number of individuals in social protection institutions, as well as on the ongoing legislative activity.

2 ACTION DESCRIPTION

2.1 Overall objective

To evaluate the impact of the Cash Transfers Programme (CTP) on specific categories of beneficiaries.

2.2 Specific objective (s) (purpose)

To have a picture of different forms of vulnerability and multi-dimensional poverty affecting the beneficiaries of the CTP

To adapt the support provided through the CTP to the different levels of vulnerability and multi-dimensional poverty affecting recipient families

2.3 Expected results

Different categories of cash transfers recipients according to their level of vulnerability are identified

Adequate forms of supports for addressing the specific needs of different categories of cash transfers recipients according to their level of vulnerability are identified

2.4 Final deliverables

D1. A framework for analysis that helps MoSD to differentiate among different categories of recipients of cash transfers

D2. A technical note that helps MoSD to introduce multi-dimensional poverty considerations in the management of the CTP

D3. A guidance report that identifies complementary forms of support that MoSD may make available to recipients of cash transfers according to their specific vulnerability

3 IMPLEMENTATION METHODOLOGY

3.1 Summary

The action deploys across three stages (activities, that is, experts' missions), in order to address the overall objective of evaluating the impact of the Cash Transfers Programme (CTP) on specific categories of beneficiaries in view of adapting the support provided through the CTP to recipient families affected by different levels of vulnerability and multi-dimensional poverty.

SOCIEUX+ has deployed a fact-finding mission in September 2019, in order to narrow down the scope of the request submitted by MoSD. In that occasion, several actual issues have been jointly identified. Two of them deserve particular attention, as they might affect the workings of the Action.

First, due to the current, ongoing financial and budgetary crisis hitting the Palestinian National Authority following the suspension of transfers by the Israeli government to the PNA of Palestinian tax and customs money (<https://carnegieendowment.org/sada/79050> ; <https://www.middleeastmonitor.com/20190218-israel-trims-funds-to-palestinians-over-militant-stipends/>) the payment of CTP benefits is jeopardized. Entitled families have received in 2019 only

3 out of 4 quarterly payments. This is definitely affecting the economic and livelihood situation of families that heavily rely on those contribution to make ends meet. This issue is, of course, outside the scope and the capacity of intervention of SOCIEUX+, but it shall be considered as an external, though crucial variable to the National Cash Transfers Programme.

Secondly, both the Ministry and its international partners consider that the impact of cash transfers on the well-being of entitled families and their perspectives to escape poverty isn't properly assessed. This is due, from one side, to a lack of impact assessment capacity available at MoSD and its regional Directorates; from the other, more fundamentally, impact assessment should take into account the different characteristics of recipients and how their respective vulnerabilities may be addressed by cash benefits. In other words, a poor family that, for instance, includes disabled people within its components, certainly faces different vulnerabilities and experiments different needs than, say, a family who supports environmental or pollution/degradation-related conditions. There is therefore a need to refine and sharpen the tools available at MoSD to undertake impact assessment by taking into account the different multi-dimensional poverty situations that recipient families face.

For starters, CTP beneficiaries are selected according to a consumption-based proxy means test formula (monetary and assets related criteria) that estimates a poverty score to each applicant household. Social workers of the Ministry Regional Directorates are in charge of regular updates of the family records and eligibility re-certification. A complaint mechanism is also in place. Eligible households receive a monthly allowance of between ILS 250 to ILS 600 paid on a quarterly basis. The annual average family allowance is ILS 4,660 (€1,106). Families are also entitled to other state-provided assistance, including free health insurance from Ministry of Health, food assistance, and school fee waivers from Ministry of Education. According to the 2017 World Bank impact evaluation of the CTP, the latter contributes to protecting beneficiaries' livelihoods by maintaining household consumption and covering basic needs, but is not enough to drive them out of poverty.

4 DESCRIPTION OF ACTIVITIES

4.1 Tasks

During the first activity, mobilized experts shall look into the characteristics of CTP's recipient families in view to determine different levels and forms of vulnerability by taking into account multi-dimensional poverty considerations. The CTP would benefit to have available a framework for analysing different forms of vulnerability and multidimensional poverty, in view to adapt, according to the CTP's nature and features, the kind of support provided to recipient families. Experts shall be able to assess the impact that CTP currently has on different categories of beneficiaries, and to identify and characterize those categories, by applying multidimensional poverty considerations and tools for analysis. In all those perspectives, experts shall interact with different departments of MoSD, as well as with external partners that provide support to MoSD's action in the field of poverty alleviation.

Minimum tasks expected from the experts shall include:

- Ahead of the mission, to get substantial knowledge of the local context; review any relevant background documents provided by the SOCIEUX+ Team and/or the Partner.
- Preliminary contacts with the Partner in view of the preparation of the mission's methodology and agenda, to be transmitted ahead of mission to the SOCIEUX+ team for approval;
- Taking part to the pre-departure briefing with SOCIEUX+ team (around 1 week before the mission);
- During the mission, to conduct consultations with the Partner's executives and staffs, as well as any other external actor that can support the positive deployment of the mission. In particular, experts shall engage in consultations both with the EU Delegation, which will ultimately support the implementation of a project aiming at establishing and running a M&E system at MoSD.
- To present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalization;
- At the end of the mission, timely submission to SOCIEUX+ of the final deliverables (10 working days after the mission), and availability to go through an eventual round of comments and adjustments in interaction with SOCIEUX+ and the Partner;

- To channel to SOCIEUX+ Communication officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).
- To employ the different templates and evaluation forms provided by the SOCIEUX+ Team.

4.2 Deliverables

Intermediary deliverables (to be transmitted to SOCIEUX+ Facility Management Team at least three working days ahead of the activity)

- *A methodological note (max. 3 pages), detailing the working approach, tools and methods to employed, a risks analysis*
- A detailed agenda (max. 2 pages), detailing the meetings and working sessions to be held, persons to meet

Final deliverables (to be transmitted to SOCIEUX+ Facility Management Team no later than ten days after the activity's completion):

- Action Report (AcR). To be filled according to template.
- Final deliverable D1 (annex 1 to Action Report). A framework for analysis that help MoSD to differentiate among different categories of recipients of cash transfers.
- Experts' Mission Report (ExMR). To be filled according to template.

NB: The Principal Expert is responsible for the overall preparation and transmission of the activity's deliverable, in cooperation with rest of the expert team.

5 EXPERTISE PROFILE

Principal expert (Expert 1):

Area of expertise: *Poverty-reduction strategies, including cash transfers*

Requirements (essential/required):

Education: university level (Masters or PhD relating to the subject are considered a plus)

At least 15 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society;

Relevant experience in designing, managing and/or evaluating poverty alleviation and/or social assistance policies;

Significant experience and proved capacities in designing and managing cash transfers instruments;

Fluent in English, written and oral;

Acute sense of diplomacy and institutional relations.

Additional assets (advantageous in selection):

A previous experience in delivering short-term technical assistance in international cooperation;

A previous professional experience in Palestine or the Middle East

Expert 2

Area of expertise: *Multi-dimensional poverty analysis*

Requirements (essential/required):

Education: university level (Masters or PhD relating to the subject are considered a plus)

At least 10 years of professional experience within EU or regional (Middle East & North Africa) public administrations or, international organisations, academia, social partners, civil society;

Relevant experience in analysing and/or designing multi-dimensional poverty policy frameworks;

A relevant experience in designing, managing and/or monitoring cash-transfers programs or other monetary poverty alleviation instruments

Fluent in English, written and oral;

Acute sense of diplomacy and institutional relations

Additional assets (advantageous in selection):

A previous experience in delivering short-term technical assistance in international cooperation;

A previous professional experience in Palestine or the Middle East

Provisional work load:

- o 3 days for the preparation;
- o 15 days on-site;
- o 2 days travel;
- o 3 days reporting and finalisation of deliverables.

6 REPORTING

Intermediate deliverables (Methodological Note, Agenda) are to be transmitted to SOCIEUX+ at least three working days ahead of the activity, in A4 editable format, font size 12, single line spaced; the Methodological Note shall not exceed 3 pages, the Agenda 2 pages.

Final deliverables (the Action Report and the Final Deliverable) are to be transmitted to SOCIEUX+ Facility Management Team no later than 10 days working days after the Activity's completion. The AcR is based on a specific SOCIEUX+ format. The Final Deliverable shall be presented in in A4 editable format, font size 12, single line spaced.

A joint **Experts Mission Report (ExMR)** shall be prepared by the experts after the assignment, under the coordination and overall responsibility of the Principal Expert. The ExMR is based on a specific SOCIEUX+ format and should serve to inform on the (i) the objectives of the activity, (ii) the approach and methodology applied, (iii) the main tasks performed and results achieved. Furthermore, it shall contain (iv) an assessment of involvement of Partner institutions/participants and expected impact as well as give (v) some recommendations.

The reporting language is English.

Submission procedure of final Deliverables and ExMR:

Step 1: The Deliverables and the Expert Mission Report shall be submitted in an editable electronic format (MS Word) to the SOCIEUX+ Facility Management Team by Email (contact@socieux.eu) within two weeks (10 working days) of the conclusion of the Activity/Action for comments and review.

Step 2: SOCIEUX+ Facility Management Team will have 5 working days to submit comments, revisions and requests of amendements to the Deliverables and ExMR to the attention of the experts.

Step 3: The Expert(s) will then have 5 working days to amend the Deliverables and ExMR and send it back to the SOCIEUX+ team for final approval.

ExMR are internal documents solely intended for SOCIEUX+ Facility Management Team. There are not intended or are to be shared with any other stakeholders, in draft or final form.

Step 4: Once the documents have been approved by the SOCIEUX+ Facility Management Team, the Deliverables will be shared with the beneficiary institution, EuropeAid and all other relevant stakeholders.

The documents shall be sent by e-mail to: contact@socieux.eu.

7 CODE OF CONDUCT

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to post-delivery follow-up. The SOCIEUX+ Facility Management Team will assist experts to fulfil their assignments by supporting and advising on the preparation of background materials prior to meetings. The SOCIEUX+ team will collect feedback from partner countries and ensure that mission reports and recommendations are delivered to national authorities, the EU Delegations in the partner countries and EuropeAid.

The experts mobilised are not representing SOCIEUX+ or the EU. Technical opinions and recommendations expressed are their own. They shall not express negative opinions on the implementation or actions supported by SOCIEUX+ to third-parties. Nevertheless, they shall be aware of SOCIEUX+'s objectives and functioning, and promote the facility at the best of their knowledge, whenever possible and feasible.

Finally, the experts shall perform their duties in the Partner Country in a way that is fully compliant with and respectful of the local institutions, policies and cultural behaviours; they shall particularly adopt an institutionally-sensitive behaviour in their way to deal with the local counterparts.

8 APPLICATION

8.1 4.1 Documentation:

Curriculum Vitae in *ENGLISH* and Europass format – available at:

<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

8.2 4.2 Submission of applications

Interested experts submit their application on the website: <https://pmt.socieux.eu>

The application process is the following:

1. If not already created, experts create their own personal SOCIEUX+ account (by clicking on "create an account"). To have access to all SOCIEUX+ Call for Applications, experts are required to fill out at least the fields marked with an asterisk.
2. Once their account is created and approved by the SOCIEUX+ team, experts sign in their personal account, click on the "Call for Applications" tab, identify the **19-24/WGB/1** position, and click on "Apply."

If more information is needed, please contact SOCIEUX+ team by email to experts@socieux.eu with the application reference.

9 SELECTION PROCESS

If you do not receive a response within 30 days of the application deadline, please consider that your application has not been shortlisted.

Only short-listed applicants may be contacted. The selection process may include interviews by phone or other communication means.

Public civil servants or employees (active or retired) and private individual experts are eligible and preferred for this position. Private consultants may also apply.

Contracted public civil servants or employees (active or retired) are entitled to standard fixed allowances of 250 Euro per working day. Fees for private consultants will be negotiated based on the number of years of relevant expertise of the selected applicant.

Interested candidates may download the **Guide for Experts with detailed information on contracting with SOCIEUX+** at www.socieux.eu

10 DISCLAIMER

The proposed activity and mission are subject to the final review and approval of SOCIEUX+ Quality Assurance Committee. A confirmation of dates of missions and contracting of experts may only confirmed upon the formal approval.

Short-listed candidates may be required to provide contact of employer or proof of their ability to be directly contracted under their status as civil servant or public employee.

TABLE OF CONTENTS

About SOCIEUX+	2
1 Background information	3
1.1 Country overview	3
1.2 Sector situation.....	3
1.3 Role of partner institution in sector.....	3
2 Action description	4
2.1 Overall objective	4
2.2 Specific objective (s) (purpose).....	4
2.3 Expected results.....	4
2.4 Final deliverables.....	4
3 Implementation methodology	4
3.1 Summary	4
4 Description of activities	5
4.1 Tasks.....	5
4.2 Deliverables.....	6
5 Expertise profile	6
6 Reporting	7
7 Code of conduct	8
8 Application	8
8.1 4.1 Documentation:	8
8.2 4.2 Submission of applications	8
9 Selection process	8
10 Disclaimer.....	9