

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2019-35 TANZANIA*

Action title: *Development of a comprehensive Rehabilitation Strategy of the WCF*

Partner institution: *Workers Compensation Fund (WCF) of Tanzania*

Activity number and title (if applicable): *Activity #2 – Proposal for a WCF rehabilitation strategy*

Date of implementation of activity/ies: *22 January 2021 to 22 March 2021*

Expert positions and responsibilities (by activity):

Activity #2 : Expert #1 (principal) – *Policy & Strategy making and development / Labour administration*

Activity #2 : Expert #2 – *Policy & Strategy making and development / OSH, rehabilitation*

Workload:

Activity #2 - Expert #1 : 11 days

Activity #2 - Expert #2 : 11 days

Call for experts' reference: **19-35/TNZ/2**

Version - #: 2__

Draft

Final

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1 BACKGROUND INFORMATION

1.1 Country overview

In 1964, Tanganyika united with the Island of Zanzibar to form the United Republic of Tanzania, the largest in the East African region, bordered by Kenya and Uganda to the North, Rwanda, Burundi and the Democratic Republic of Congo to the West and Zambia, Malawi and Mozambique to the South. Tanzania has a population of around 50 million people. While the official capital is Dodoma, the largest city, chief port, major economic and transportation hub and de facto capital, is Dar es Salaam. Spoken languages are Swahili and English (both official), Arabic (widely spoken in Zanzibar).

Tanzania has been spared the internal strife that has blighted many African states. Unfortunately, domestic stability has not translated into economic prosperity for Tanzanians. Despite efforts between 2007 and 2016 that have reduced the country's poverty rate from 34.4% to 26.8%, the absolute number of poor people has held at about 13 million due to high population growth, although the country has had some success in wooing donors and investors. Tanzania is a developing country and its economy depends heavily on agriculture. The sector accounts for more than 40% of GDP, provides 85% of the country's exports and employs 80% of the total workforce. Apart from the agricultural sector, tourism, mining and small scale industries are increasingly contributing to the national economic growth.

1.2 Sector situation

The setup of social security in Tanzania has adopted a three-pillar model, articulated into the National Social Security Policy of 2003. In the 1st pillar, social assistance is offered to marginalized citizenry and special groups. Prominent programs in this pillar include those administered by the Tanzania Social Action Fund (TASAF) that provides cash transfers and public work to deserving poor. Currently, it is estimated that out of the total population of around 55 million people, existing social assistance programs covers slightly above 1 million poor households with approximately 7 million beneficiaries in total. The 2nd pillar focuses mainly on the workforce in the formal and informal sector. Under this arrangement, employers and the self-employed are obliged by law to remit contributions to social security institutions on monthly/regular basis. Statistics show that coverage under this arrangement is at around 11% of the labour force. Individuals covered are mainly members of mandatory social security institutions that exist in the country, such as the National Social Security Fund (NSSF), the Public Service Social Security Fund (PSSSF), the National Health Insurance Fund (NHIF) and the Workers Compensation Fund (WCF). Through the Social Security reform of 2018, the National Social Security Fund (NSSF) has a legal mandate to cover members from both private sector as well as those in the informal sector. The 3rd pillar focuses on voluntary contributions over and above the mandatory arrangements. Voluntary contributions are still low due to various reasons including low saving culture among people.

Despite major progress realized so far - such as the merger of four social security funds into one, and the establishment of the Workers Compensation Fund in 2015 - a number of challenges remain. It is estimated that over 80% of the Tanzanian population is not covered by social security programs. Most of those lacking social security coverage are in the informal sector and are in majority the rural habitants. Adequacy of benefits provided is another challenge that raises complaints from the members.

1.3 Role of partner institution in the sector

With regards to employment injury protection, appropriate legal regulations were passed in the years 2000s (in particular the Occupational Health and Safety Act No. 5 of 2003; the Workers' Compensation Act No. 20 of 2008, but also the Employment and Labour Relation Act No. 6 of 2004 and the Mining Act of 2010). While the Occupational Safety and Health Authority (OSHA) is working since several years, the WCF has been established a few years later than foreseen in the 2008 Workers' Compensation Act (2015 instead of 2008). Since 2015 WCF is working and developing steadily. It is self-governed by a tripartite board under the framework of the Law. The number of staff and their occupational skills seem to be appropriate to the tasks of the WCF, even if there is still a lack of staff who is well trained in rehabilitation management. Factories, enterprises and industrial establishments must register to WCF, according to the Law; in reality, the major industrial players are almost completely registered and paying their contributions, while smaller enterprises are less compliant. Most of the registered establishments seem to pay their contributions (1 % of the wages) in a reliable and steady matter. The WCF has to pay benefits only to the newly injured persons, not to persons having been injured or sick in the past (before the foundation of the WCF). Therefore the WCF today has available more revenues than what is actually needed for benefits' payment. Therefore, the financial situation of the WCF seems to be stable, but the loads from the past and the loads caused by new cases will grow in the future.

The WCF actually covers around 50.000 establishments with more than 2 million of insured persons. According to the statistical data from the first 2 ½ years (2017 – 2019) of its existence, the WCF registered only around 5.000 work injuries, for which benefits have been paid. If these figures hold true, the number of work injuries per year will probably not be above 3.000 in the very next years. Of course, this will depend by the rate of economic growth in the formal sector, with possible effects in terms of increasing the number of registered enterprises and formal workers, but also on the further extension of the WCF to the informal sector, which is foreseen in the legal framework but in fact very difficult to achieve.

2 ACTION DESCRIPTION

2.1 Overall objective

Improving the rehabilitation strategy in force at WCF.

2.2 Specific objective (s) (purpose)

SO1. Critically review the existing draft of WCF rehabilitation strategy.

SO2. Conduct a tripartite social dialogue (involving the WCF, the Unions' Commission and the Employers' Association) to get a mutual understanding of a rehabilitation strategy for victims of accidents and work-related sickness.

SO3. Finalize and adopt a WCF rehabilitation strategy.

2.3 Expected results

ER1. A dialogue between the WCF, the Unions' Commission and the Employers' Association in view to get a mutual understanding on the main principles and actual components of a rehabilitation strategy for victims of accidents and work-related sickness, is set-up and steered.

ER2. The final draft of a WCF rehabilitation strategy is achieved and adopted by the WCF.

2.4 Final deliverables

D1. A brief note assessing the actual draft WCF rehabilitation strategy, which helps identifying problematic issues, as well as components that shall be included in a rehabilitation strategy.

D2. A WCF rehabilitation strategy paper.

3 METHODOLOGY

3.1 General methodology (of the action)

During Activity 1, experts have assessed and critically reviewed the draft WCF's rehabilitation strategy, which has been prepared by WCF staff in consultation with local professionals, while presenting relevant experiences on rehabilitation approaches and tools adopted by social security, OSH-related organizations, in Europe and beyond. The review has allowed to flag criticalities in the existing draft document, as well as to identify issues that shall be included and/or further developed in the draft document. Those elements are gathered into the activity's deliverable (D1), namely a brief note assessing the actual draft WCF rehabilitation strategy. Based on the observations and shared findings of the first activity, including those coming from relevant social partners involved in the discussion, experts will accompany the finalization of the WCF rehabilitation strategy. This document (D2) shall later be adopted by WCF and disseminated among relevant partners and constituents.

As regards this second activity, the peer-to-peer cooperation between European experts and their counterparts at the WCF will take place remotely, as the current global health emergency due to the continuation of the COVID-19 infection, and the related ongoing restrictions to international travel, do not allow an on-site mission of the experts in conditions of safety and certainty.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Review of the *WCF rehabilitation strategy and gathering views of relevant stakeholders*
- **Activity 2 – Proposal for a *WCF rehabilitation strategy***

The present terms of reference cover the services expected for activities of the above work plan:

- Activity #2.

3.3 Inclusion of cross-cutting issues

SOCIEUX+ recognises the importance to include cross-cutting issues in social protection, labour and employment policies and systems. The following cross-cutting issues are duly taken into account:

- Gender;
- Good governance;
- Human rights (including rights of children, people living with disabilities, vulnerable groups and minorities); and,
- Social and economic inclusion of vulnerable groups.

4 ACTIVITIES DESCRIPTION

4.1 Tasks

Until end of 2020, SOCIEUX+ has suspended all on-site missions, due to the current emergency situation. A later assessment will determine whether the present activity will be conducted remotely or on site. In case the consultations will be conducted from the distance, SOCIEUX+ will provide Experts and Participants with adequate IT support (ZoomPro licence, Moodle learning platform).

The principal expert will lead the remote/on-site mission. He/she will be responsible for the delivery of all deliverables of the activity (see below Section **iError! No se encuentra el origen de la referencia.**). He/she will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+. Experts will use at all times SOCIEUX+ templates.

The main tasks of the mission team include:

1) Preparation phase:

- Experts will get substantial knowledge of the local context by reviewing relevant background documents provided by SOCIEUX+ and the Partner Institution, familiarise themselves with the SOCIEUX+ templates and materials, consider possible communications and knowledge management aspects of the activity. Experts will also build on the results and observations from Activity 1.
- A contact person from the Workers' Compensation Fund (WCF) will be identified to guide experts and collaborate in the formulation of the activity, for example by making a list of resource persons within and outside the WCF, facilitating Experts in the preparation and delivery of the activity.
- Experts will prepare a methodological note and detailed agenda (intermediate deliverables) based on discussions with the resource persons and to be agreed by the partner institution and approved by SOCIEUX+. The methodological note will outline a specific proposal for the activity, and shall include a draft outline of the deliverable rehabilitation strategy. The agenda will include a calendar for implementation of the proposed activity and a list of actors that will be included in the consultations.
- A briefing meeting will be organised between experts and the SOCIEUX+ team ahead of the on-site/distance mission. The purpose of this meeting will be to validate the intermediate deliverables and clarify any other aspects to take into account, including possible communications and knowledge management opportunities. A separate meeting may be organised with SOCIEUX+ Communications specialist and/or the Knowledge development specialist as needed.

2) Implementation phase:

- During the (remote) mission, the expert team will interact with the identified resource persons, as per the outlined methodology and agenda. In case the activity will be conducted remotely, SOCIEUX+ ZoomPro may be used.
- Based on the observations and shared findings of the first activity and the methodology, including those coming from relevant social partners involved in the discussion, experts will accompany the finalization of the WCF rehabilitation strategy. This document shall later be adopted by WCF and disseminated among relevant partners and constituents.
- Following the implementation of the activity, Experts will disseminate evaluation online forms, to be compiled by the participants (PAE). The effective compilation of these reports by participants is not under the Experts' responsibility.
- During the mission, experts should arrange a meeting with the EU Delegation office in Dar es Salaam with the purpose of informing the Delegation of the ongoing activity, gather supplementary information and/or showcase results.
- Depending on the visibility and/or knowledge development opportunities identified in the preparation with the SOCIEUX+ team, experts may channel to SOCIEUX+ any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), as well as take short videos introducing the actors involved, the activity and the results.

3) Reporting phase:

- Within 10 working days from the end of the training, Experts will produce the final deliverables (see 4.2.2)
- The Annex to the AcR will consist in a rehabilitation strategy paper. The strategy document will be delivered in a format that will allow the WCF for prompt adoption and dissemination among relevant partners and constituents.
- The final Annex will be shared with SOCIEUX+ team for approval, and with the Partner institution. A final round of comments and adjustments may be organized with the WCF before finalisation.

4.2 Deliverables

To adjust as necessary

4.2.1 Pre-mission deliverables

- P1: A methodological note, detailing the working approach, tools and methods to employ, a risks analysis, etc. The Methodological Note shall not exceed 3 pages (excluding cover page and annexes).
- P2: A activity/mission agenda, detailing the meetings and working sessions to be held, persons to meet, etc. The Activity/mission Agenda shall not exceed 2 pages.

4.2.2 Final deliverables

- ExMR: An individual Expert Mission Report (ExMR) in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX+. The expert team may also submit a single-joint ExMR report if they prefer to do so (see instructions on the template).
- ExF: An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- AcR: A collective Activity Report (AcR) in SOCIEUX+ format (template provided). This AcR is to be produced jointly by the mission team. It is intended for the Partner Institution, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted in during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- Annex to AcR: D2: rehabilitation strategy paper.

5 REPORTING AND SUBMISSION OF DELIVERABLES

5.1 Formats

All deliverables and products of the activity (notes, reports, presentations, etc) shall comply with the formats and templates provided by the SOCIEUX+ Team.

All deliverables are to be submitted in electronic in electronic editable versions [Microsoft Word 97-2003 [doc], PowerPoint 97-2003 [ppt] and Excel 97-2003 [xls]; or in equivalent OpenDocument format). Non-editable electronic document such as in Portable Document Format (PDF) shall not be accepted.

Templates for electronic presentations during the activity/mission are provided by the SOCIEUX+ Team. These templates are in Microsoft PowerPoint format and comply with the SOCIEUX+ Corporate Image standards. These templates are to be used as a sole format by all members of the expert mission team. They are to be used for all presentations by the experts during and for the activity/mission. The use by the experts of their own, or their organisation(s), templates or formats are not allowed unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

All versions of deliverables or other products used or produced during activity/mission by the experts shall include the following disclaimer:

"Disclaimer:

The responsibility of this publication sole lies with its authors. The European Union, the European Commission, the implementation partners of SOCIEUX+ and the SOCIEUX+ Staff are not responsible for any use that may be made of the information contained therein."

Please refer to the expert information package for further guidance on communication and templates.

All deliverables are to be provided in English.

5.2 Submission and approval

All deliverables versions (drafts, final or other) shall be submitted directly and only to SOCIEUX+ Team, unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

5.2.1 Pre-mission deliverables

- Pre-mission deliverables shall be submitted no later than 5 working days before the start of activity or departure of the mission of the experts, whichever is the earliest.
- Pre-mission deliverables will be shared and reviewed by the SOCIEUX+ and the Partner Institution. Feedback on the deliverables should be provided to the Principal Expert at latest 2 days before the start of activity or departure of the mission of the experts, whichever is the earliest. Comments and recommendation of this feedback shall be taken into account for the implementation of the activity/mission by the experts. Only the mission agenda shall be resubmitted with revision if requested by the SOCIEUX+ Team.

5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted no later than 10 working days upon completion of the activity or return of the experts.
- Feedback to the first draft version of the report should be provided 10 working days after its submission.
- Inclusion of the feedback on drafts versions is expected 5 working days upon reception of the comments by the principal expert. (In general, no more than one round of feedback and revision is required, unless the quality of the deliverables is considered unsatisfactory by the SOCIEUX+ Team or/and the Partner Institution.)
- Final versions of the deliverables should be approved or rejected no later than 10 working days upon their submission to the SOCIEUX+ Team.
- Final payments and reimbursement of travel costs to experts can only be authorised upon approval of the final version of the deliverables by SOCIEUX+.

6 REQUIRED EXPERTISE

6.1 Expertise profile

Principal expert (Expert 1):

Area of expertise: Occupational Safety and Health, Rehabilitation

Specific skills: Policy & Strategy making and development

Requirements (essential/required):

- University level; master and PhD relating to the subject are a plus
- At least 15 years of professional experience within an EU public administration, academy, and social partners;
- Relevant experience in drafting rehabilitation policies related to work injuries and occupational diseases

- Relevant experience in the management and/or administration of public insurance schemes relating to the rehabilitation of persons victims of work injuries and/or diseases;
- An executive experience in steering OSH-related organizations;
- Demonstrated experience in Labour administration, particularly on work injuries and occupational diseases insurance schemes
- 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 developing countries; previous knowledge of the local context in Tanzania.

Expert 2:

Area of expertise: Social Security Administration & Inspection

Specific skills: Policy & strategy (P&S) making and development

Requirements (essential/required):

- University level; master and PhD relating to the subject are a plus
- At least 10 years of professional experience within an EU public administration, academy, and social partners;
- Relevant experience in drafting rehabilitation policies related to work injuries and occupational diseases
- Relevant experience in the management and/or administration of public insurance schemes relating to the rehabilitation of persons victims of work injuries and/or diseases;
- A previous experience in organizing/conducting medical rehabilitation of persons victims of work injuries and/or diseases;
- 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 developing countries; previous knowledge of the local context in Tanzania.

6.2 Estimated workload

	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	2	5	0	4	11
Expert (#2)	2	5	0	4	11
Total	4	10	0	8	22

7 APPLICATIONS

7.1 Call for experts

All calls for experts for SOCIEUX+ activities are published online on the SOCIEUX+ website. Interested experts should submit their application on the SOCIEUX+ on-line expert database: <https://pmt.socieux.eu> (currently only available in English). The application process is:

1. If they have not already, experts create their SOCIEUX+ account by clicking on “Create an account” using an email address.
2. Login details for their account will be sent to experts by email, experts should create and submit their profile for review by¹:
 - a. Providing contact details
 - b. Providing information on the competences, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, *experts are encouraged to complete in most detail de sections on skills and competences as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*
 - c. Uploading of a curriculum vitae, preferably in Europass format².
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab “Call for experts” and click on “Apply.”

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

Collaborative or interested institutions wishing to make expertise available for a specific call for application may directly contact the team of SOCIEUX+ at experts@socieux.eu.

7.2 Selection of experts

In principle, SOCIEUX+ mobilises experts from the public administrations and mandated bodies of EU member states, and practitioners working for social partners, including:

- Practitioners, civil servants and employees from publicly mandated bodies;
- Collaborators and employees of social partner institutions, such as trade unions and employer associations; and,
- Academic and research institutions.

Active public experts from collaborative institutions are given priority in the selection. Private consultants may also apply. Their application will be considered in case an appropriate public expert cannot be identified.

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

SOCIEUX+ reserves the right to select the profiles before the deadline is met.

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

7.3 Contracting of public experts

Public experts can be in active duty or retired. Retired employees from international specialised agencies or cooperation agencies can also be mobilised, without regard to their former employer's collaborating with SOCIEUX+ on a specific action. Retired experts are considered as public experts for all purposes, benefits, and financial compensation provided by SOCIEUX+.

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

7.4 Financial compensations

¹ SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

² Europass templates for CVs are available here:
<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

Contract officials or active-duty or retired employees are entitled to standard fixed allowances of 350 euros per working day worked. The fees of private consultants are negotiated according to their number of years of relevant expertise and the standard scale of SOCIEUX+.

Retired experts are assimilated to public employees for all intents and purposes, benefits and financial compensation provided by SOCIEUX+.

National regulations on remuneration and compensation of public employees and civil servants applies, and may limit the payment of allowances by SOCIEUX+. The responsibility for compliance and verification lies with individual experts and their institutions of origin. The payment of income or other taxes is the sole responsibility of the mobilised experts and/or their organisations.

7.5 Travel costs

All travel expenses for the mobilised experts (public, private or international institutions) are covered by SOCIEUX in accordance with the **Guide for Experts and Collaborative institutions** with detailed information on contracting with SOCIEUX+ (version as on date of signature of the contract).

8 COMMUNICATION & VISIBILITY

SOCIEUX + can use its communication channels, such as the web, newsletter and other media, to share information about the implementation and results of the activities. For this, contributions of the experts mobilised are expected. The experts may be requested to provide such contributions in the field of communication as photographs, provide short texts, and interviews.

Short briefings, before and after the mission, with the Communication Officer of SOCIEUX+. This briefings will provide the opportunity to identify communication opportunities and strategies.

For specific activities, visibility products, such as brochures, USB sticks, notebooks and pens, can be made available to experts for on-site distribution.

9 CODE OF CONDUCT

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to the delivery of products. The SOCIEUX+ Team will assist experts to fulfil their assignments by supporting and advising on the preparation of background materials before meetings. The SOCIEUX+ team will collect feedback from partner institutions and relevant stakeholders to 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 of actions supported by SOCIEUX+ to third-parties. Nevertheless, they shall be aware of SOCIEUX+'s objectives and functioning, and promote its services at the best of their knowledge, whenever possible and feasible.

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 a culturally-sensitive behaviour in their way to deal with the local counterparts.

10 OTHER CONSIDERATIONS

If applicable

...Text...

11 ANNEXES

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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 by the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development, entitled *Our world, our dignity, our future*. A significant number of cooperation initiatives in these fields are funded by geographic or thematic instruments of the EU in different countries. Those initiatives are highly structured and address the medium- to long-term needs of partner countries. However, short-term measures and peer-to-peer cooperation to promote the development of social protection systems are needed to complement the EU's cooperation with third countries. SOCIEUX+ - EU Expert Facility on Employment, Labour and Social Protection responds to this need.

The SOCIEUX+ facility was setup by the EU through co-funding from France, Spain and Belgium and the resources managed by the European Commission's Directorate for Development and Cooperation (EuropeAid). The facility is implemented by a partnership composed of development cooperation agencies from Member States: Expertise France (the partnership lead), Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development 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. Its 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 short-term, peer-to-peer technical assistance and knowledge development.

SOCIEUX+ recognises the impact of social protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems. SOCIEUX+ also complements the efforts made through other European Union initiatives.

The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

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