

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2022-18 JORDAN*

Action title: Support to the Social Security Corporation of Jordan in adopting a referral mechanism

Partner institution: Social Security Corporation of Jordan

Activity 1: Mapping of various approaches to referral systems and their relevance to the Jordanian context

Activity 2: Roadmap for the SSC to adopt a referral system

Date of implementation of activities:

Activity 1: **3 October until 11 November 2022 (on-site 17-28 October 2022)**

Activity 2: **21 November until 30 December (5-16 December on-site)**

Expert positions and responsibilities:

Activity 1 & 2 : Expert 1 (*principal*) Health insurance, access to health, P&S making and development

Activity 1 & 2 : Expert 2 – Health policy, medical care, Health policy, medical care

Workload:

Activity 1 - Expert 1 : 20 days, Activity 2 – Expert 1: 20 days

Activity 1 – Expert 2 : 19 days, Activity 2 – Expert 2: 19 days

Call for experts' reference: **22-18/JOR/1-2**

Version - #: 2

☐ Draft

☒ Final

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1 BACKGROUND INFORMATION

1.1 Country overview

The Hashemite Kingdom of Jordan shares borders with Iraq, Israel, Saudi Arabia, Syria, and a portion of the Palestinian territories, as well as maritime borders with Egypt. The capital, Amman, hosts almost half of the country's population. The total population was estimated at 10.2 million in 2021¹.

The country has a high HDI value, 0.729, ranking at 102, and is considered an upper middle income economy².

Jordan is a unitary state under a constitutional monarchy (adopted in 1952 and amended a number of times since) where the king retains wide executive and legislative powers from the government and parliament. He appoints the government for four year terms and is commander-in-chief of the Armed Forces.

Jordan's economy is diversified: trade and finance account for nearly one third of GDP, transportation, communication, public utilities, and construction represent one-fifth of total GDP, while mining and manufacturing constitute nearly that proportion. Remittances from Jordanians working abroad are a major source of foreign exchange. Services – particularly government spending, public administration, defence – account for about one-fourth of GDP, and employ about one-third of the workforce. The country's vulnerable geography has led to high military expenditures. Despite the support of the IMF and World Bank to increase the private sector, the state remains the dominant force in Jordan's economy³.

The country has been hampered by recession, debt, and unemployment since the mid-90s. The small size of the market, fluctuations in agricultural production, lack of capital, large number of refugees, have made it necessary for Jordan to continue seeking foreign aid. Indeed, the country received massive influxes of Palestinian refugees after the Arab-Israeli wars of 1948-49 and 1967 and the annexation of the West Bank, as well as refugees from the Iraq War of 2003, and Syrian Civil War.

Jordan begun its recovery from the COVID-19 induced shock: GDP grew by 2.2% in 2021 following a 1.6 contraction in 2020.

1.2 Sector situation

The COVID-19 crisis has put in evidence some of the weaknesses of the current social security system and urgent need to increase effective coverage to the informal sector.

Social protection programmes are provided by the National Aid Fund (NAF), the Ministry of Social Development (MoSD), the Social Security Corporation, and international donors.

The NAF offers non-contributory programmes to Jordanian citizens aimed at providing income security, working poor, addressing shocks resulting from natural disasters, loss of family members or immediate financial needs.

The MoSD offers non-contributory schemes covering persons living with disabilities, community development, family and childhood protection, and social defence.

Almost 63% of Jordanian workers are covered by SSC programmes of which women account for less than 20%.

The Jordanian National SP Strategy 2019-2023 puts emphasis on the review and realignment of social protection programs, as there has been an accumulation of separate programs with similar goals, resulting in inefficient spending and duplicated efforts. Availability of new data allows to assess existing programs and understand the population's evolving needs.

One of the many strategic goals of this strategy is to reach a comprehensive and equitable health insurance by enhancing the efficiency and transparency of government spending on the health

¹ [UNData app](#)

² [Specific country data | Human Development Reports \(undp.org\)](#)

³ Irvine, Verity Elizabeth, Bickerton, Ian J. and Jaber, Kamel S. Abu. "Jordan". Encyclopedia Britannica, 8 Apr. 2022, <https://www.britannica.com/place/Jordan>. Accessed 8 July 2022.

sector, and to improve primary health care services and reduce the over-use of secondary and tertiary services.

The social health insurance is rather fragmented in Jordan: with public, military, royal, and private sector actors having their own insurance schemes.

1.3 Role of partner institution in the sector

The SSC is a general solidarity insurance scheme that provides social and economic protection to the population. The benefits and funding sources of this scheme are determined by the law. Benefits are funded by the contributions paid by the insured persons and employers.

Jordan's first social security law dates back to 1978 and covered programs of work injury benefits, old-age, survivors, disability benefits, all programs to be administered by the Social Security Corporation (SSC). Until 1995 the SSC covered only private sector workers, then reforms were passed to close the civil servant and military schemes to new entrants and phase those out.

The Jordanian government, through the SSC, is planning on implementing a new health insurance scheme for private sector workers, pensioners and their families, who are already beneficiaries of SSC coverage.

The SSC solicited the ILO in October 2021 to receive support on evaluating the proposed scheme design as well as to undertaking an assessment of the cost of the scheme.

It is deemed important to adopt a strategic plan aimed at extending coverage of the contributory system to all categories of workers, as well as other population groups that are not currently covered, especially poor and vulnerable households, for whom tertiary care interventions have a catastrophic economic effect.

2 ACTION DESCRIPTION

2.1 Overall objective

- Institutional capacities of employment, labour and social protection institutions are strengthened and reinforced.

2.2 Specific objective (s) (purpose)

- To adopt a referral system mechanism for the SSC's health insurance

2.3 Expected results

- A mapping of varying approaches to gate-keeping mechanisms with their pros and cons are provided to the SSC
- The SSC is equipped with a roadmap for adopting a referral system

2.4 Final deliverables

- A report mapping various approaches to referral systems and their relevance to the Jordanian context
- A roadmap or action plan for the SSC to adopt a referral system

3 METHODOLOGY

3.1 General methodology (of the action)

This action will take place on site, in Jordan. The mobilized team of experts will implement a peer-to-peer methodology and involve the partner institution's relevant staff in their consultations.

Experts will first acquire knowledge of the healthcare landscape and context in Jordan, will carry out desk research before the activity takes place on site, analyse documentation provided by

SOCIEUX+ and the partner institution on the health sector in Jordan, and have at least one pre-mission meeting with the partner institution.

The **first activity** will be one of **mapping various approaches to referral systems implemented in the world, and which path could be more suitable for the Jordanian context and the SSC.**

It will be crucial to carry out the following activity, for experts to have knowledge of existing health facilities (and their readiness to provide services) in Jordan, local demographic characteristics and burden of diseases, geographic mapping of facilities to understand the reach, which types of services are offered in these facilities.

The **second activity builds on the findings and suggestions from the previous activity**, i.e. the mapping of various referral mechanism systems implemented in the world. This second activity will aim at **providing the SSC with necessary guidelines to be able to design and implement, in full autonomy, an effective referral network and mechanism.**

The following steps will be used as baseline for establishing a referral mechanism (this list is non-exhaustive and experts may wish to add or remove unnecessary steps):

- the ownership of the referral mechanism (the mechanism will place its roots within an already existing health system)
- constitution of a technical committee to provide inputs for the referral mechanism
- assessment of existing facilities (are there already referral mechanisms in place?)
- defining the referral network and linking primary health care facilities to higher facilities
- draft a referral service directory: list of all health facilities including public and private facilities that can provide diagnostic and specialist care
- use of technology to implement the mechanism (using an online referral management system (ORMS) to save unnecessary paperwork in hospitals, real-time monitoring of data entered by health workers on mobile phones/computers, easy integration of data with existing systems...)

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Mapping of various approaches to referral systems and their relevance to the Jordanian context
- Activity 2 – Roadmap for the SSC to adopt a referral system

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

- **Activities 1 & 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 equality;
- 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 (for each activity)

The principal expert will lead the on-site mission. He/she will be responsible for the delivery of all deliverables of the activity (see below Section **Erreur ! Source du renvoi introuvable.**). He/she will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+.

The main tasks of the mission team include:

- Ahead of the action to get substantial knowledge of the local context, norms, healthcare needs of Jordan, gaps and challenges;
- Preliminary contacts with the PI in view of the preparation of the mission's methodology and agenda, to be transmitted ahead of the mission to the SOCIEUX+ team for approval;
- Taking part to the **pre-mission briefing** with SOCIEUX+ team (around **1 week before the start of the action**);
- To make themselves available for a meeting with the **EU Delegation in Amman** (SOCIEUX+ will introduce the experts to the focal point within the EU Delegation). Synergies with ongoing and planned EU support in social protection and health insurance should be ensured, therefore the EUD in Amman should be kept informed;
- To make themselves available for a meeting with a representative from the **Ministry of Health, the Ministry of Social Development and the ILO**;
- During the mission, to conduct consultations with the **SSC's key staff**;
- 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 use the different templates and evaluation forms provided by the SOCIEUX+ team.

4.2 Deliverables (for each activity)

4.2.1 Pre-mission deliverables

- 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).
- 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

- 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).
- An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- 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.
- **Technical deliverable for activity 1:** A report mapping various approaches to referral systems and their relevance to the Jordanian context.

- **Technical deliverable for activity 2:** A roadmap for the SSC to adopt a referral system

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(s) of expertise: Health insurance, access to health

Specific skill(s) of expertise: P&S making and development

- *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 organizations*
- *Specific experience and skills in health insurance policies and strategies;*
- *Specific experience in referral system mechanisms;*
- *Expertise on the institutional strengthening of universal health coverage;*
- *Knowledge and/or research on the investments needed for the development of comprehensive social protection systems*
- *Fluent in English, written and oral;*
- *Acute sense of diplomacy and institutional relations*

Expert 2:

Area(s) of expertise: Health policy, medical care

Specific skill(s) of expertise: P&S making and development

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 10 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society organizations*
- *Specific experience and skills in health insurance policies and strategies;*
- *Specific experience in referral system mechanisms;*
- *Fluent in English, written and oral;*

Acute sense of diplomacy and institutional relations

6.2 Estimated workload

Activity 1:

	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	4	10	2	4	20
Expert (#2)	3	10	2	4	19
Total	7	20	4	8	39

Activity 2:

	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	4	10	2	4	20

Expert (#2)	3	10	2	4	19
Total	7	20	4	8	39

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 by⁴:
 - 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 format⁵.
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.

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

⁴ SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

⁵ Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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

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

N/A

11 ANNEXES

N/A

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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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