

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2022-25 KENYA*

Action title: Review of the existing policy and regulatory frameworks in view of the introduction of an Unemployment Benefits scheme in Kenya

Partner institution: National Social Security Fund (NSSF)

Activity/ies number(s) and title(s):

Activity 1 – To conduct a review and finalize the existing policy framework setting the stage for the introduction of an unemployment benefits (UB) scheme within the NSSF, including its main components/design, as well as the strategic and operational steps to be undertaken

Activity 2 – To conduct a review and finalize the existing regulatory reform framework in view to uphold the policy proposal for the introduction of an Unemployment Benefits (UB) scheme agreed upon in the preceding activity

Tentative dates of implementation and location:

- *Activity 1* – Preparation 16 to 12 February 2023, on-site implementation from 13th February to 24th February 2023, reporting up to 17 March 2023
- *Activity 2* – Preparation 20th March to- 7 April 2023, on-site implementation 10 to 21 April 2023, reporting up to 12th May

Expert positions and responsibilities (by activity):

Activity 1 :

- Expert 1 (principal) – Unemployment Benefits (1.2.P&S making and development)
- Expert 2 – Unemployment Benefits (2.1 Legislation & Regulation making and development)

Activity 2 :

- Expert 1 (principal) – Unemployment Benefits (2.1 Legislation & Regulation making and development)
- Expert 2 – Unemployment Benefits (1.2.P&S making and development)

Workload:

Activity 1 - Expert 1 :

Total 22 days (10 days at distance; and 12 days onsite)

Expert 2 : Total 20 days (8 days at distance; and 12 days onsite)

Activity 2 - Expert # :

Total 22 days (10 days at distance; and 12 days onsite)

Expert 2 : Total 20 days (8 days at distance; and 12 days onsite)

Call for experts' reference: **22-25/KEN/1 & 22-25/KEN/2**

Version - #: 2

☐ Draft

☒ Final

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1 BACKGROUND INFORMATION

1.1 Country overview

Kenya, officially the Republic of Kenya (Swahili: Jamhuri ya Kenya), is a country in Eastern Africa. With an area of 580,000 km², Kenya has a population of 46 million people (2015). The largest and most populous city and the national capital of Kenya is Nairobi, while the second largest city and the country's chief port is Mombasa.

Kenya has made significant political and economic reforms that have contributed to sustained economic growth, social development, and political stability gains over the past decade. However, its key development challenges still include poverty, inequality, transparency and accountability, climate change, continued weak private sector investment and the vulnerability of the economy to internal and external shocks. Kenya's Human Development Index (HDI) value for 2021 was 0,575—which put the country in the Medium human development category—positioning it at 152 out of 191 countries and territories. Between 1990 and 2021, Kenya's HDI value changed from 0,474 to 0,575, a change of 21.3 percent. In 2021, life expectancy at birth in Kenya was 61.4 years and the average number of years of schooling was 6.7.

Kenya ushered in a new political and economic governance system with the entry into force of a new constitution in 2010 that introduced a bicameral legislative house, devolved county government, and a constitutionally tenured judiciary and electoral body. The first election under this new system was held in 2013. A presidential election was held in August 2022.

From 2015 to 2019, Kenya's economy achieved broad-based growth averaging 4.7% per year, significantly reducing poverty (which fell to an estimated 34.4% at the \$1.9/day line in 2019). In 2020, the COVID-19 shock hit the economy hard, disrupting international trade and transport, tourism, and urban services activity, in particular. Fortunately, the agricultural sector, a cornerstone of the economy, remained resilient, helping to limit the contraction in GDP to only 0.3%. In 2021, the economy staged a strong recovery, although some sectors, such as tourism, remained under pressure. GDP growth is projected at 5.0% in 2022 and the poverty rate has resumed its trend decline after rising earlier in the pandemic. Although the economic outlook is broadly positive, it is subject to elevated uncertainty, including through Kenya's exposure (as a net fuel, wheat, and fertilizer importer) to the global price impacts of the Russian invasion of Ukraine.

In 2017, Kenya adopted the country's new development blueprint covering the period 2008 to 2030: **Kenya Vision 2030**¹. It aims to transform Kenya into a newly industrialising, "middle-income country providing a high-quality life to all its citizens by the year 2030". Kenya Vision 2030 is based on three pillars: the economic, the social and the political.

1.2 Sector situation

Kenya has been developing its tax-financed social protection system for the past 10 years, but the level of expenditure in social protection in GDP terms still remains, according to ILO's 2017 statistics, around 1% (excluding health), which is a half of the Sub-Saharan average level at 2% of national GDP. Since 2011, the social protection sector has undergone significant improvements, with the gradual expansion of regular, predictable transfers under the Inua Jamii Programme, Kenya's flagship National Safety Net. In 2018, the Government implemented a universal social pension for all older person aged 70 years and above, representing Kenya's first entitlement programme. The national social protection sector comprises three pillars:

- Social assistance, which offers 'direct cash transfers to poor and vulnerable people over their life-cycle' and, in Kenya, is financed either from general government revenues or by donors.
- Social security, which is financed by contributions from individuals and employers and aims to offer 'retirement schemes to informal sector workers and to increase the range and adequacy of NSSF benefits.'

¹ Kenya Vision 2030: <http://www.vision2030.go.ke/wp-content/uploads/2018/05/Vision-2030-Popular-Version.pdf>

- Health insurance, which is also financed by contributions from individuals, employers or government and aims to offer all citizens access to health services

Currently, there is no provision in law for unemployment insurance and benefits. For this reason, guided by the Constitution of Kenya, Article 43 (1)(e), ILO Convention 102 and 168 and Recommendation 176, the Cabinet Secretary, Ministry of Labour and Social Protection drafted a Cabinet Memorandum (2021) proposing the establishment of a contributory Unemployment Insurance Fund (UIF) to cushion workers who lose their employment. In consideration of the advisory by the Attorney General, and in consultation with the Cabinet Secretary, Ministry of Labour and the social partners, it was agreed that UIF be anchored under the National Social Security Fund (NSSF) Act.

1.3 Role of partner institution in the sector

The National Social Security Fund (NSSF) was established in 1965 through an Act of Parliament Cap 258 of the Laws of Kenya. The Fund initially operated as a Department of the Ministry of Labour until 1987 when the NSSF Act was amended transforming the Fund into a State Corporation under the Management of a Board of Trustees appointed by the Minister responsible for matters relating to labour and social security. The composition of the Board is on a tripartite basis with representation from the Government, employers and workers. The Act was established as a mandatory national scheme whose main objective was to provide basic financial security benefits to Kenyans upon retirement. The Fund was set up as a Provident Fund providing benefits in the form of a lump sum. The NSSF covers formal sector employees in Kenya other than employees covered under the public service pension scheme. In 2006, voluntary membership and contributions were introduced, particularly from the informal sector.

The National Social Security Fund (NSSF) Act, No.45 of 2013 was intended to transform the NSSF from a Provident Fund to a Pension Scheme to which every Kenyan with an income shall contribute a percentage of his/her gross earnings so as to be guaranteed basic compensation in case of permanent disability, basic assistance to needy dependants in case of death and a monthly life pension upon retirement. The Act establishes two Funds namely, the Pension Fund and the Provident Fund, to provide for contributions to and payment of benefits out of the Funds. Currently, the NSSF provides lump sum benefits on retirement at or after age 50, earlier invalidity, to survivors on death of a member and on permanent emigration from Kenya. A funeral grant and a maternity grant were also introduced in 2004.

The creation of an unemployment benefits (UB) scheme within the NSSF framework aims to provide cash payments during involuntary unemployment in order to maintain to a substantial degree the unemployed worker's standard of living, as well as providing time to find employment consistent with their skills and experience. In order to lead the implementation of an UB, a Steering Committee comprising of the Attorney General and Cabinet Secretaries/ Principal Secretaries drawn from the Ministries of Labour and Social Protection, and National Treasury was established. The Steering Committee was expected to provide strategic policy direction and guidance. Consequently, the Cabinet Secretary of the MOL facilitated meetings with the tripartite parties comprising of the Ministry of Labour and Social Protection, Federation of Kenya Employers and Central Organization of Trade Unions, together with the International Labour Organization to build consensus on the policy directive. Policy discussions have revolved around whether to adopt an unemployment insurance (UI) scheme or unemployment individual savings accounts (UISAs) considering the fact that the Benefit shall be anchored at the NSSF, which currently operates an Individual Savings Accounts (UISA) system.

With the support from the government of Netherlands, KEN/19/51/NLD, ILO enhanced the capacity of the tripartite partners in March 2021 on unemployment protection through provision of technical guidance in the consensus building processes and in the development of the roadmap for the establishment of the Unemployment Insurance Fund. ILO has also supported the government to conduct a feasibility and an actuarial analysis. Together with ILO technical cooperation, the Partner Institution (PI) has been working in a set of policy and regulatory documents (roadmap, actuarial study, legal gap analysis, legal drafting instructions, overview of the UB scheme, draft UB bill and regulations, policy matrix and stakeholder engagement framework, among others). These documents will constitute the framework of the peer-to-peer cooperation facilitated by SOCIEUX+.

2 ACTION DESCRIPTION

2.1 Overall objective

Access to employment and social protection is expanded to poor and vulnerable groups.

2.2 Specific objective (s) (purpose)

To extend the scope of the National Social Security Fund of Kenya as to include Unemployment Benefits

2.3 Expected results

R. 1: The existing policy frameworks are reviewed and finalized in view of the introduction of an Unemployment Benefits scheme in Kenya

R.2: The existing regulatory frameworks are reviewed and finalized in view of the introduction of an Unemployment Benefits scheme in Kenya

2.4 Final deliverables

D. 1: Reviewed and finalized existing policy framework, setting the stage for the introduction of an unemployment benefits (UB) scheme within the NSSF, including its main components/design, as well as the strategic and operational steps to be undertaken

D. 2: Reviewed and finalized existing regulatory reform framework in view to uphold the policy proposal for the introduction of an Unemployment Benefits scheme within the NSSF agreed upon in the preceding activity

3 METHODOLOGY

3.1 General methodology (of the action)

Together with ILO technical cooperation, the Partner Institution (PI) has been working in a set of policy and regulatory documents (roadmap, actuarial study, legal gap analysis, legal drafting instructions, overview of the UB scheme, draft UB bill and regulations, policy matrix and stakeholder engagement framework, among others) that constitute the framework of the peer-to-peer cooperation facilitated by SOCIEUX+. This SOCIEUX+ action focuses on reviewing and finalizing the existing policy and regulatory frameworks - i.e. the strategic and the normative dimensions pertaining to the introduction of an Unemployment Benefits scheme under the NSSF in Kenya (Results 1 & 2):

At the end of the Action:

- the review and finalization of the existing policy framework, setting the stage for the introduction of an unemployment benefits (UB) scheme, including its main components/design (benefit duration, benefit rate, contingency and persons covered, qualifying period, eligible reasons for job termination, waiting period, reference and insurable earnings, financing approach, etc.), as well as the strategic and operational steps to be undertaken, will have contributed to move forward in the consensus building and political decision-making processes (activity 1)
- the review and finalization of the existing draft legal reform texts intended to expand the NSSF's relevant regulations in view to integrate an Unemployment Benefits scheme shall translate into applicable norms the policy framework resulting from activity 1.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – To conduct a review and finalize the existing policy framework setting the stage for the introduction of an unemployment benefits (UB) scheme within the

NSSF, including its main components/design, as well as the strategic and operational steps to be undertaken

- Activity 2 – To conduct a review and finalize the existing regulatory reform framework in view to uphold the policy proposal for the introduction of an Unemployment Benefits (UB) scheme agreed upon in the preceding activity

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

- Activity 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;
- Environmental sustainability;
- 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

4.1.1 Activity 1:

The objective of the first on-site activity is to provide the Partner Institution with expert advice and consulting on the existing policy framework setting the stage for the introduction of an unemployment benefits (UB) scheme within the NSSF.

Given the short-term nature of the mission, the experts and partner institution will agree during the preparation on a shared methodology, focusing on the outline and scope of the final deliverable. The mission is meant to jointly and critically review, update and complete the recent, existing policy documents that make up the intended strategy aimed to introduce UB under the NSSF. Relevant documents will be shared with the experts' team ahead of and during the preparation phase. They include a roadmap, an actuarial study, an overview of the UB scheme, a policy matrix and a stakeholders' engagement framework, among others). The present peer-to-peer cooperation shall facilitate the emergence of a general policy framework drawing from pre-existing documents, the state of the art with regards to the issue of unemployment and the current institutional framework, instructions received from the NSSF, international standards, guidelines and cutting-edge transferable national laws.

The policy documents shall cover the main components/design of the new scheme such as benefit duration, benefit rate, contingency and persons covered, qualifying period, eligible reasons for job termination, waiting period, reference and insurable earnings, financing approach, as well as the strategic and operational steps to be undertaken.

An expert group of SOCIEUX+ experts and a selected team from the Partner Institution shall be composed. It is for the Partner Institution to deliberate and find the members of such an expert group, which should be large enough to cover all relevant components of the policy framework and at the same time small enough to be operational and able to agree on specific aspects of a potential new unemployment benefits (UB) scheme within the NSSF. The workshops will be dedicated to the material review and finalization of the policy proposal, which could be further refined by the experts in the reporting phase up to the desired stage as agreed.

All along the process, the team of experts shall provide critical recommendations regarding key outcomes and timely action for the Partner institution in terms of leadership, strategic planning and institutional configuration.

After the meetings of the expert group, the partner institution may request that a concept note be presented to decision makers, so they can take the necessary policy decisions for the introduction of an unemployment benefits (UB) scheme within the NSSF.

The Experts' team:

The principal expert will lead the mission on site. He/she is responsible for the production of all deliverables of the activity (see section 4.2). He/she will also be responsible for the preparation, coordination, implementation and reporting and/or coordination of the overall activity.

The experts shall conduct the activity by means of organising a series of workshops with the Partner Institution and relevant stakeholders, including tripartite constituents, based on the co-developed methodology and agenda.

The Partner Institution:

The partner institution shall work in collaboration with experts supporting the preparation and implementation of the activity. The partner institution shall facilitate the organisation of the activity with regards to the following aspects:

- providing one or more resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation and implementation of the activity, including sharing relevant information, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant
- Facilitate the organization of a meeting of experts with high-level decision makers of the Ministry of Labour, in order to present the preliminary reform proposal and to incept the internal reflection that shall conduct to a validation of the proposal.
- the material organisation on site (including covering the costs of premises and logistics).

Tasks:

Minimum tasks expected from the experts shall include:

Preparation:

- Get substantial knowledge of the local context; review relevant policy and institutional framework documents.
- Co-develop the mission's methodology and agenda (intermediate deliverables), in collaboration with the Partner Institution.
- Agree with the Partner on logistical arrangements for the implementation of on-site activities.
- Transmit the intermediate deliverables to the SOCIEUX+ team for approval.
- Take part to the pre-mission briefing with SOCIEUX+ team (around 1 week before the start of the action).
- Contact the EU Delegation to Kenya to organise a briefing and/or debriefing upon arrival (SOCIEUX+ will introduce the experts to the focal point within the EU Delegation).

Implementation:

- During the mission, conduct consultations with the Partner's key staff and other stakeholders deemed necessary to meet for the purpose of this activity as per methodology and agenda. The partner institution shall facilitate and arrange the meetings.
- 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 finalisation.
- Participate in the briefing/debriefing with the Delegation of the European Union in the country.
- At the end of the exchanges, ask the workshop participants to complete a short feedback questionnaire (link provided by SOCIEUX+).

- Channel to SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

Reporting:

- At the end of the mission, timely submit to SOCIEUX+ the final deliverables (10 working days after the mission). Use the templates and evaluation forms provided by SOCIEUX+.
- Go through a round of comments and adjustments in interaction with SOCIEUX+ and the Partner.

4.1.2 Activity 2:

The implementation of this on-site activity depends on the outcomes of activity 1 and the Partner's orientations with regard to the main components/design of the future Unemployment Benefits (UB) scheme, which should provide the basis for initiating the joint drafting of specific amendments to the legal framework under which the proposed UB scheme would be anchored in act.2.

Given the short-term nature of the mission, the experts and partner institution will agree during the preparation on a shared methodology, focusing on the outline and scope of the final deliverable: list of pre-existing normative documents that need to be revised, complemented and finalized (e.g., National Social Security Fund Act, 2013, Employment Act, 2007, Public Finance Management Act, 2012) .

A series of on-site workshops shall be organised to enable the co-drafting process together with the resource persons from the partner institution. The workshops will be dedicated to the material drafting of the regulatory reform proposal, which will be further refined by the experts in the reporting phase up to the desired stage as agreed.

All along the process, the team of experts shall provide critical recommendations regarding key outcomes and timely action for the Partner institution in terms of leadership, strategic planning and institutional configuration.

The final deliverable will refer to the reviewed and finalized legal texts governing the new Unemployment Benefits (UB) scheme within the NSSF.

The Experts' team:

The principal expert will lead the mission on site. He/she is responsible for the production of all deliverables of the activity (see section 4.2). He/she will also be responsible for the preparation, coordination, implementation and reporting and/or coordination of the overall activity.

The experts shall conduct the activity by means of organising a series of workshops with the Partner Institution and relevant stakeholders, including tripartite constituents, based on the co-developed methodology and agenda.

The Partner Institution:

The partner institution shall work in collaboration with experts supporting the preparation and implementation of the activity. The partner institution shall facilitate the organisation of the activity with regards to the following aspects:

- providing a team of resource-persons to technically participate in the co-drafting of the legislation text along with the experts;
- contributing to the technical preparation and implementation of the activity, including sharing relevant information, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant
- the material organisation on site (including covering the costs of premises and logistics).

Tasks:

Minimum tasks expected from the experts shall include:

Preparation:

- Get substantial knowledge of the local context; review relevant policy and institutional framework documents.
- Co-develop the mission's methodology and agenda (intermediate deliverables), in collaboration with the Partner Institution.
- Agree with the Partner on logistical arrangements for the implementation of on-site activities.
- Transmit the intermediate deliverables to the SOCIEUX+ team for approval.
- Take part to the pre-mission briefing with SOCIEUX+ team (around 1 week before the start of the action).
- Contact the EU Delegation to Kenya to organise a briefing and/or debriefing upon arrival (SOCIEUX+ will introduce the experts to the focal point within the EU Delegation).

Implementation:

- During the mission, conduct consultations with the Partner's key staff and other stakeholders deemed necessary to meet for the purpose of this activity as per methodology and agenda. The partner institution shall facilitate and arrange the meetings.
- 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 finalisation.
- Participate in the briefing/debriefing with the Delegation of the European Union in the country.
- At the end of the exchanges, ask the workshop participants to complete a short feedback questionnaire (link provided by SOCIEUX+).
- Channel to SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

Reporting:

- At the end of the mission, timely submit to SOCIEUX+ the final deliverables (10 working days after the mission). Use the templates and evaluation forms provided by SOCIEUX+.
- Go through a round of comments and adjustments in interaction with SOCIEUX+ and the Partner.

4.2 Deliverables

4.2.1 Activity 1:

4.2.1.1 *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.

4.2.1.2 *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 (D1):** Reviewed and finalized existing policy framework, setting the stage for the introduction of an unemployment benefits (UB) scheme within the NSSF, including its main components/design, as well as the strategic and operational steps to be undertaken

4.2.2 Activity 2

4.2.2.1 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.

4.2.2.2 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 (D2):** Reviewed and finalized existing regulatory reform framework in view to uphold the policy proposal for the introduction of an Unemployment Benefits scheme within the NSSF agreed upon in the preceding activity

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 writing [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

6.1.1 Activity 1:

Principal expert (Expert #1):

Area(s) of expertise: Social Security; Unemployment Benefits

Specific skill(s) of expertise: 1.2. Policy & strategy making and development

Requirements (essential/required):

- a) The education type and level required:

"Master's" degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master's degree can be replaced by a combination of

academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:

- An intermediate academic degree ("Bachelor", equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
- A first-level academic degree ("License", equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- b) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):

Ten (10) years.

- c) Required language knowledge: English

- d) *Acute sense of diplomacy and institutional relations.*

- e) Other essential qualification(s):

- Relevant experience in strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on unemployment benefits issues) **within an EU public administration;**

Additional assets (advantageous in selection):

- f) Professional recognised certification(s): social protection, social security and/or *social benefits-related issues,*

Second Expert (Expert #2):

Area(s) of expertise:

- *Social security; Unemployment benefits*

Specific skill(s) & competency(ies):

2.1 Legislation & Regulation making and development

Requirements (essential/required):

- a) The education type and level required:

"Master's" degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master's degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:

- An intermediate academic degree ("Bachelor", equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
- A first-level academic degree ("License", equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- b) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):

Ten (10) years.

- c) Required language knowledge: English
- g) *Acute sense of diplomacy and institutional relations.*
- d) Other essential qualification(s):
- e) *Relevant experience in strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on unemployment benefits issues) **within an EU public administration**;*

Additional assets (advantageous in selection):

- f) Professional recognised certification(s): social protection, social security and/or *social benefits-related issues*,

6.1.2 Activity 2

Principal expert (Expert #1):

Area(s) of expertise:

- *Social security; Unemployment benefits*

Specific skill(s) & competency(ies):

2.1 Legislation & Regulation making and development

Requirements (essential/required):

- g) The education type and level required:
“Master’s” degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master’s degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:
 - An intermediate academic degree (“Bachelor”, equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
 - A first-level academic degree (“License”, equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- h) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):
Ten (10) years.
- i) Required language knowledge: English
- h) *Acute sense of diplomacy and institutional relations.*
- j) Other essential qualification(s):
- k) *Relevant experience in strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on unemployment benefits issues) **within an EU public administration**;*

Additional assets (advantageous in selection):

- l) Professional recognised certification(s): social protection, social security and/or *social benefits-related issues*,

Second Expert (Expert #2):

Area(s) of expertise: *Social Security; Unemployment Benefits*

Specific skill(s) of expertise: 1.2. Policy & strategy making and development

Requirements (essential/required):

- a) The education type and level required:

“Master’s” degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master’s degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:

- An intermediate academic degree (“Bachelor”, equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
- A first-level academic degree (“License”, equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- b) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):

Ten (10) years.

- c) Required language knowledge: English

- d) *Acute sense of diplomacy and institutional relations.*

- e) Other essential qualification(s):

- Relevant experience in strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on unemployment benefits issues) **within an EU public administration**;

Additional assets (advantageous in selection):

- f) Professional recognised certification(s): social protection, social security and/or *social benefits-related issues*,

Collaborative institutions:

Public or publicly mandated institutions from European Union Member States with relevant expertise and competencies as outlined above are also encouraged to directly apply and contact SOCIEUX+ to provide expertise and participate in these/this activity. Focal points and responsible staff may directly contact the SOCIEUX+ Team at:

experts@socieux.eu, indicating the reference of the call for experts.

6.2 Estimated workload

6.2.1 Activity 1

	Preparation	Onsite work	Travel	Reporting & deliverables	Total
Principal expert (#1)	5	10	2	5	22
Expert (#2)	4	10	2	4	20
Total experts	9	20	4	9	42

6.2.2 Activity 2

	Preparation	Onsite work	Travel	Reporting & deliverables	Total
Principal expert (#1)	5	10	2	5	22
Expert (#2)	4	10	2	4	20
Total experts	9	20	4	9	42

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+ online 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 by²:
 - a. Providing contact details
 - b. Providing information on the competencies, 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 competencies 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 format³.
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 if 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

Public experts can be on 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+.

² SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

³ Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

Short-listed candidates may be required to provide the contact of the employer or proof of their ability to be directly contracted under their status as a 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 into public employees for all intents and purposes, benefits and financial compensation are provided by SOCIEUX+.

National regulations on remuneration and compensation of public employees and civil servants apply 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 following the **Guide for Experts and Collaborative institutions** with detailed information on contracting with SOCIEUX+ (version as of the 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+. These 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 preparing 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 the European Commission.

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 to 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 culturally-sensitive behaviour when dealing with their local counterparts.

10 OTHER CONSIDERATIONS

Arrival and departure from Kenya

- **Visa**

A visa is requested to enter Kenya. The passport must be valid for at least six months from the date of entry.

From January 1st, 2021, it will be compulsory to obtain, prior to arrival in Kenya, an electronic visa, issued online at <http://evisa.go.ke/evisa.html>. This visa must be presented for the boarding, and it will no longer be possible to obtain a visa on arrival at international airports.

- **COVID-19**

For travellers over 5 years of age arriving by air in Kenya:

- Travellers with a vaccination certificate showing a complete vaccination schedule against COVID-19 - i.e., 2 injections for 2-dose vaccines or 1 injection for single-dose vaccines - are exempt from the requirement to perform a Covid-19 PCR test. These travellers should upload their vaccination certificate to the Global Haven website prior to boarding. It is necessary to print the QR code generated by the [Global Haven website](#), which can be checked upon arrival in Kenya.
- Travellers who have not completed a full vaccination schedule must present a negative Covid-19 PCR test certificate within 72 hours of boarding the flight to Kenya. The negative Covid-19 PCR test certificate must be downloaded from the [Global Haven website](#) prior to boarding. It is also necessary to print the QR code generated by the Global Haven website which can be checked upon arrival in Kenya. Unvaccinated travellers may also be subject to a rapid antigen test on arrival (particularly if they are symptomatic). Anyone who tests positive for the rapid antigenic test may be subjected to a PCR test, potentially at their own expense (USD 50), and may be required to self-isolate.
- Travellers who are exempt from possession of a full vaccination schedule in Kenya are subject to the same conditions as unvaccinated travellers mentioned in the previous point (negative Covid-19 PCRT test less than 72 hours old, Global Haven QR code, potential additional checks on arrival). The following categories of travellers are considered exempt from the requirement for full vaccination against SARS-COV-2 by Kenya:
 - o travellers whose health condition does not permit vaccination. These persons should provide a medical certificate detailing the medical reason for not being vaccinated, which may be requested in-country.
 - o Travellers who have recovered from active infection with COVID-19. These persons should provide a medical certificate in English (in paper format) certifying effective recovery from SARS-COV-2 infection within the previous 90 days, which may be requested in the country.

All travellers, regardless of their point of entry into Kenya, and even if they are only in transit through the country, must complete the [Kenyan Ministry of Health's Covid-19 Travellers Health Surveillance Form](#) prior to departure. After completing the form, travellers are given a QR code which must be printed and presented on arrival in Kenya.

Masks must still be worn in all administrations and means of transport (air and land).

- **Yellow fever**

Yellow fever is endemic in central and western Kenya. Vaccination is strongly recommended.

11 ANNEXES

N/A

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ABOUT SOCIEUX+

The SOCIEUX+ Facility was established and funded by the EU through the European Commission's Directorate-General for International Partnerships (DG INTPA) and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). The Facility is co-funded by France, Spain, and Belgium. It is implemented by a partnership composed of 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 Facility's general objective is to expand and improve access to better employment opportunities and inclusive Social Protection systems in Partner Countries. Its specific objective is to enhance Partner Countries' capacity to 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 EU initiatives.

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



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