

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2023-02 LEBANON*

Action title: Technical and institutional appraisal for the establishment of a single registry for social protection in Lebanon

Partner institution: *Ministry of Social Affairs*

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

- Activity *#1* – *Definition of a strategic and operational framework*

Tentative dates of implementation and location:

- Activity *#1* – March 6th, 2023 to March 27th, 2023 (13-17 March - tbc)

Expert positions and responsibilities (by activity):

- Activity *#1* : Expert *#1* *Social Safety Nets*

Workload:

Activity *#1* - Expert *#1*: Total 13 days (8 days at distance; and 5 days onsite)

Call for experts' reference: **23-02/LEB/1**

Version - #: 1 ☒ Draft

☐ Final

Date: February *21, 2023*

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Partnership led by



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1 BACKGROUND INFORMATION

1.1 Country overview

Lebanon is a country located in the Middle East. It has a surface of 10,452 square kilometres and a population of 5,432,000 inhabitants. The capital is Beirut and the currency in use is the Lebanese lira/pound. Lebanon gained its independence on 22 November 1943. The country has seen several conflicts unfold on its soil, the Lebanese Civil War (1975–1990), South Lebanon conflict (1985–2000), the *Second Lebanon War* in 2006, conflicts in 2007 and 2008 as well as spill over from the Syrian Civil War.

Lebanon is facing a major socioeconomic crisis due to increasing public debt and high fiscal deficit. In recent years, the economic and financial crisis lasting from October 2019 has been further exacerbated by the explosion of port of Beirut and the economic impact of the COVID-19 pandemic. Lebanon is facing an economic and financial crisis ranked among the worst economic crises globally since the mid-nineteenth century. Nominal GDP dropped approximately to US\$52 billion in 2019 to an estimated US\$23.1 billion in 2021. As a result, Lebanon was reclassified by the World Bank as a lower-middle income country, down from upper middle-income status in July 2022.

The decline in average income coupled with triple-digit inflation and a severe currency depreciation have negatively affected the population's purchasing power, with the effects of inflation disproportionately affecting the poorest as well as the middle class. The social impact of these crises is significant with a drastic reduction in provision of basic services, steep unemployment (29% in 2022) and an increasing share of the population living under the poverty line.

1.2 Sector situation

The main social assistance programmes in Lebanon are:

- 1) The National Poverty Targeting Programme, which provides monthly social assistance allowances to some 65,000 extremely poor Lebanese families. The programme is funded through international grants since 2014 and implemented by the UNFWP.

The National Poverty Targeting Programme (NPTP) was formally launched in 2011 as Lebanon's first poverty-targets social assistance programme that provides a package of assistance to the poorest Lebanese households (HHs) and has three components:

- i. **Health:** comprehensive health coverage for beneficiaries in public and private hospitals through a waiver of 10-15 percent co-payments for hospitalization.
- ii. **Education:** Registration fee waivers and free books for students in secondary (including vocational) public schools; and
- iii. **Food assistance** via the electronic card, launched in November 2014

The food assistance has evolved to provide unrestricted cash assistance to extremely poor Lebanese families, in USD, since October 2021. The health and education components have been traditionally covered by the government, but have been put on hold since 2020, due shrinking fiscal capacity to cover the costs of these two types of allowances.

- 2) The Lebanon Emergency Crisis and Covid-19 Response Social Safety Net Project (ESSN), which provides the same amount of monthly social allowances to an additional 147,000 extremely poor Lebanese families. The programme is funded through a concessional loan by the World Bank.
- 3) Other programmes providing social assistance to the vulnerable individuals (disabled), social services and social security benefits; these include an EU and Germany funded project providing cash for education for children enrolled in public education: social grants provided by UNICEF and ILO through EU funding, to disabled individuals with ages between 18 and 28 years old (allowances to start in Jan 2023); other types of regular social assistance provided through NGOs.

In addition, the social assistance programmes run in parallel with the social security programmes and the social services provided to the beneficiaries. These are the National Social Security Fund, private health insurances schemes administered by syndicates, other private social insurance schemes.

The programmes operate using different databases of beneficiaries, which do not communicate between each other.

Lebanon lacks a unified repository for data on Social Protection, which severely hampers distribution of protection. It becomes crucial to know the assistance received through different programmes for the beneficiaries of the different social benefits covered through the programmes in place. It is also very urgent to step up the efforts and financial investment of the government, the WB, the EU and other actors, in the sector by producing a clear picture of the capacities and the resources of the government to better plan and manage social protection in the country. This is also a political imperative under the IMF reform package.

Social assistance programmes are not fully aligned among themselves and with other social protection sub-sectors (services, insurance, promoting employment). A clear example is the two largest social assistance programmes in Lebanon, run by the government but implemented separately: the Emergency Social Safety Net (ESSN) programme and the National Poverty Targeting Programme (NPTP). A Single registry for Social Protection is of vital importance for such alignment.

1.3 Role of partner institution in the sector

The main function of the Ministry of Social Affairs is to provide social protection and assistance.

The Prime Minister of Lebanon formed an Inter-Ministerial Technical Committee on Social Policy, chaired by the Minister of Social Affairs, to lead coordination on Social Protection in Lebanon and ensure coordination among the Government, donors, UN, WB and NGO actors.

In addition, the Minister of Social Affairs has been appointed to lead the finalisation of the National Social Protection Strategy, drafted with the support of the UNICEF and ILO. The Minister will lead on reactivation of a structured dialogue on Social Protection, together with the Social Protection Coordination Forum (SPCF) that was set up for the Lebanon Reform Recovery and Reconstruction Framework.

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)

Establish a unified social registry encompassing social assistance benefits, schemes and services as part of a unified single registry

2.3 Expected results

Different social assistance benefits, schemes and services are mapped out

Technical advice on unification of existing registries is provided

2.4 Final deliverables

- Amended workplan. A work plan (WP) for the Action including expected deliverables, activities and expertise required, established according to the SOCIEUX+ WP's template.

3 METHODOLOGY

3.1 General methodology (of the action)

The aim of the action is to support the Ministry of Social Affairs in the establishment of a unified social registry in Lebanon. To this aim the action will provide a comprehensive mapping of the situation on the ground, of the different social protection programmes in place as well as the stakeholders administering them. The action shall support the definition of a model for the unified registry. Technical advice shall be provided and shall provide planning elements to turn the Unified registry into reality.

The activity will aim to clarify the programmatic approach of the action and to outline a strategic and operational framework to address the Partner's needs by means of short-terms, peer-to-peer technical assistance. The activity shall determine the nature of the expertise needed and make a proposal for further activities (up to three) in order to contribute to the mapping of social assistance benefits, schemes and services and to the provision of technical advice regarding unification of existing registries. The expert is expected to meet with different stakeholders involved in the administration and implementation of social protection schemes. Expert shall provide a comprehensive view of the sectors situation in Lebanon and the challenges faced by the partner. At the end of the activity, an overview of the situation on the ground as well as a detailed plan for follow up activities shall be provided.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Definition of a strategic and operational framework

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

- Activity #1.

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

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:

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 in Lebanon to organise a briefing and/or debriefing upon arrival (SOCIEUX+ will introduce the expert 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.
- 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 (5 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 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

- D1: 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).
- D2: An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- D3: 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.
- D4: Amended work-plan developing further activities (up to three), laying out expertise to be deployed (2 experts per activity), timeframe of future activities, deliverables etc...

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 expert during and for the activity/mission. The use by the expert of their own, or their organisation(s), templates or formats are not allowed unless otherwise instructed in written [by email] to the expert by the SOCIEUX+ Team.

All versions of deliverables or other products used or produced during activity/mission by the expert 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 expert 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 expert, 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 expert, whichever is the earliest. Comments and recommendation of this feedback shall be taken into account for the implementation of the activity/mission by the expert. 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 expert.
- 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 expert 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): Expert in Social Safety Nets

- **Specific skill(s) of expertise:** Information management systems

Requirements (essential/required):

- “Bachelor’s” degree (or equivalent academic degree or diploma requiring three (3) years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the bachelor’s degree can be replaced by a combination of:
 - A first-level academic degree (“License” or equivalent) with an additional two (2) years of professional experience in one or more relevant fields.

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

- Minimum 5 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.
- Relevant experience in engineering and management of registries and databases for Social Assistance Benefits
- Knowledge of EU’s social safety nets

Additional assets (advantageous in selection):

- Fluent in English, written and oral
- Knowledge of Arabic
- A previous experience in delivering short-term technical assistance in international cooperation.
- A previous professional experience in Middle East

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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.

A FMT member may accompany the expert’s mission to help context analysis, liaising with relevant national stakeholders, and prepare the work-plan according to SOCIEUX+ intervention logic.

6.2 Estimated workload

	Preparation	Onsite work	Distance work	Travel	Reporting & deliverables	Total
Expert (#1)	3	5	0	2	3	13
Total expert	3	5	0	2	3	13

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 by¹:
 - 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 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 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+.

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>

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

[...Text...]

11 ANNEXES

[...Text...]

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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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