



## TERMS OF REFERENCE

### DEVELOPMENT OF A MONITORING AND EVALUATION FRAMEWORK AND PLAN FOR THE NATIONAL ROADMAP ON TRANSITIONING THE INFORMAL ECONOMY TOWARDS FORMALIZATION

#### 1. Introduction

In addressing the challenges arising from growing informality in the South African economy, Government has partnered with the social partners and all critical stakeholders in the informal economy to embrace the principles of the ILO Recommendation 204 adopted by the ILO in 2015 to provide guidance to the ILO member states on how to facilitate transition from informality to the formal economy. Recommendation 204 is an international labour standard that provides a guiding framework for the establishment of basic labour protections for workers in the informal economy. Specific objectives of the ILO recommendation 204 are to facilitate the transition of workers, and economic units from the informal to the formal economy while respecting workers' fundamental rights and ensuring opportunities for income security, livelihoods and entrepreneurship; to promote the creation, preservation and sustainability of enterprises and decent jobs in the formal economy and the coherence of macroeconomic, employment, social protection and other social policies; and to prevent the informalization of formal economy jobs. The transition from the informal economy towards formalization contribute also to achieve the SDG 8.3 "Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage formalization and growth of micro-, small- and medium-sized enterprises including through access to financial services" and SDG 10.2 "Empower and promote the social, economic and political inclusion of all irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status" and in general the Principle of "No one left behind".

Since the adoption of the ILO Recommendation 204 at the 107<sup>th</sup> Session of the International Labour Conference (ILC), the Government of South Africa and the Social Partners (including

key stakeholders in the informal economy) began an intense process of consultation to identify provisions within the Recommendation that hold particular relevance to the national context and could lay a basis for developing a national strategy to address decent work deficits in the informal economy. Sanctioned by NEDLAC<sup>1</sup> the tripartite-plus constituents established a National Technical Task Team (NTTT) to draw up a national strategy or roadmap towards facilitating the transition of the informal economy towards formal economy.

In the period leading up to the establishment of the R204 National Technical Task Team (R204 NTT), the ILO commissioned a series of studies and diagnostics into the factors, characteristics, causes and circumstances of informality in the national context to inform the design of a national strategy to facilitate the transition to the formal economy. The findings of these studies have informed various engagements by the national tripartite-plus<sup>2</sup> partners at national summits and workshops on challenges that beset the informal economy and in helping the partners to shape recommendations and proposed interventions to facilitate the transition of the informal economy to the formal economy. Social dialogue engagements by the constituents culminated in a National Indaba on the Informal Economy held in 2018. The National Indaba resulted in the drafting of a negotiated National Roadmap for transitioning the informal economy towards the formal economy.

At the National Indaba, the tripartite-plus constituents recognized the importance of setting in place a monitoring and evaluation framework for the roadmap that would help ensure regular monitoring and reporting on national progress made towards addressing prioritized areas for intervention in the informal economy. Consequently, the National Roadmap includes a draft monitoring and evaluation framework that requires further work to ensure its adherence to Results Based Management principles. The review of the draft Monitoring & Evaluation framework will help produce a useful instrument for measuring progress and impact in the implementation of the National Roadmap. It is against this background that the ILO seeks a monitoring and evaluation expert to assist the R204 NTT to refine the existing draft monitoring and evaluation framework and to develop an accompanying monitoring plan.

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<sup>1</sup> NEDLAC – National Economic Development and Labour Council (National Social Dialogue Institution)

<sup>2</sup> Tripartite-plus – Government, Business, Labour, and the Community Constituency

## 2. Overall Objectives of the consultancy

To assist the tripartite-plus R204 National TTT in developing a mechanism for the practical monitoring and evaluation of a National Roadmap towards formalization of the informal economy (including the most vulnerable to decent work deficits).

## 3. Specific Objectives

- To provide technical assistance in the review of a draft gender sensitive Monitoring and Evaluation Framework for the implementation of the National Roadmap towards transitioning the informal economy towards the formal economy,;
- To draft a gender sensitive Monitoring and Evaluation plan for the implementation of the Monitoring and Evaluation framework for the National Roadmap towards formalization of the informal economy.

## 4. Scope of work for the consultant

A consultant will be contracted to assist in the development of a comprehensive gender sensitive Monitoring and Evaluation (M&E) framework and Monitoring plan to be used to assess and measure progress and results (outcome and impact) in the implementation of the National Roadmap towards formalizing the informal economy. The review of the Monitoring and Evaluation Framework should be done in close alignment with the National Development Plan and Governments' development priorities and outcomes based planning framework. To this end the consultant will do the following;

- a) Develop an inception report that describes the process and deliverables: it will include documents to be reviewed, a meeting with the task team, and detail outlines of the products to be delivered. The IR should be approved to proceed to next steps **(5 estimated days)**
- b) Review the existing Government and the Social Partners' negotiated draft Monitoring and Evaluation framework to identify gaps in the design ensuring appropriate elements in the framework are included and in accordance with the principles of Results Based Management. **(3 estimated days)**
- c) The consultant will discuss with the National task team the proposed adjustments to the M&E framework and develop an updated Monitoring and Evaluation framework that will be explicitly linked to the Governments' development priorities and outcomes based planning framework. **(3 estimated days)**
- d) Develop a gender sensitive Monitoring & Evaluation Plan within the context of the Monitoring and Evaluation framework, **(10 days)**
- e) Facilitate a validation Workshop for the tripartite-plus constituents specifically to ensure that views of the partners have been included into the process of drafting the Monitoring and Evaluation framework and Plan. **(1 days)**
- f) Develop the final products after the validation workshop **(3 days)**

## **5. Expected Deliverables**

- i) An updated version of a comprehensive and gender responsive Monitoring & Evaluation framework that includes SMART formulation of objectives (impact level/ medium-term outcomes) expected outcomes outputs (replacing or in addition to activities, indicators, timelines and challenges in terms of tracked external factors relevant to achieve the objectives.
- ii) A comprehensive and gender responsive Monitoring & Evaluation Plan to track and reflect on progress and results of the implementation of the National Roadmap for transitioning the informal economy towards the formal economy. The Plan should include the following sections: a) narrative description of the plan and its implementation, b) an indicators matrix: per indicator, definitions and units of Measurement, data source, collection methodology, frequency and responsible person/institution; and c) Methodology to use the M&E data for management, accountability, learning (including particularly reporting and contribute to knowledge base); and d) Implementation plan (3-6 months maximum)

## **6. Timeframe**

The individual consultant shall be available for a period of 25 working Days spread out over a period commencing 22 July 2019 and ending 30 August 2019.

## **7. Skills and Qualifications**

The Service Provider should have qualifications, knowledge and experience in the following areas:

- Master's degree in a field relevant to the assignment, for example in development studies, Statistics, Results Based Management related social science fields.
- At least 5-7 years of experience in the area of RBM, Strategic Planning, and M&E related capacity building.
- Experience in design, planning and implementation of M&E systems and strategies Results and Theory of change based, including quantitative and qualitative dimensions focus on accountability, learning and management.
- Practical experience and/or familiarity with the Government of South Africa's monitoring and evaluation system and Outcomes Work Planning.
- Practical experience and/or familiarity with monitoring and evaluation of international development agencies, including the UN agencies.
- Excellent communication and writing skills in English.

## 8. Consultancy Budget

It is estimated a workload of 25 days. However, the consultancy is output based and the days are an estimation for the contract only.

## 9. PAYMENT SCHEDULE

The payment will be made in two tranches as follows:

- First payment of 50% to be made upon receipt of satisfactory first draft progress report comprising both the draft monitoring & evaluation framework and the plan.
- Final payment of 50% will be made upon submission of a satisfactory report on all the aforementioned deliverables for the assignment.

## 10. WORKING AND REPORTING ARRANGEMENT

The Consultant will work under the overall supervision of the ILO Director of the Pretoria Decent Work Team/Country Office (DWT/CO) Joni Musabayana; and in close consultation with the ILO Regional Monitoring and Evaluation Officer, Ricardo Furman and the ILO Country Programme Officer Sindile Moitse.

For on-going coordination Sindile Moitse will act as focal point of ILO. Reports shall be submitted to the ILO Director at [musabayana@ilo.org](mailto:musabayana@ilo.org) and copied to Sindile Moitse at [moitse@ilo.org](mailto:moitse@ilo.org); Lufuno Tinyani (Director: International Relations Directorate, Department of Labour) at [Lufuno.Tinyani@labour.gov.za](mailto:Lufuno.Tinyani@labour.gov.za) and Ricardo Furman ([furman@ilo.org](mailto:furman@ilo.org)).

## 11. Call for Expression of interest (Eoi)

The Call is open to national or residents in South Africa individual consultants. The answer to the Call should include:

- Letter explain why the consultant is well suited to the assignment (see above skills and qualification)
- An updated CV remarking the relevant experience
- Daily rate in USD (and rates supporting indication on rates applied in similar assignment in the last two years)
- Two references that can be consulted by email and telephone
- Confirmation of availability in the dates proposed

The answers to this Call should be send to Sindile Moitse at [moitse@ilo.org](mailto:moitse@ilo.org) and copy Ricardo Furman at [furman@ilo.org](mailto:furman@ilo.org) by 24<sup>th</sup> June 2019.