**TERMS OF REFERENCE**

**Purpose of the Assignment:** Conduct budget analyses of the 2021 State Budget and 2022 Budget Proposal and produce Social Action Budget Brief and Social Sectors Brief (Budget Memo)

**Section Submitting:** Social Policy Evaluation and Research - SPEAR

**PURPOSE AND OBJECTIVE.**

The SPEAR section aims to hire a consultant to conduct budget analyses and produce analytical and advocacy products to be used by the office to advance equitable investments for children, at different moments of the budget cycle. The analyses will have to result in two key products: (i) Social Action Budget Brief; and (ii) Budget Memo. The Social Protection Budget Brief should be based on the 2021 Enacted Budget and the Budget Memo on the 2022 Budget Proposal and then be revised once the 2022 Budget is approved by the Parliament. Other documents to be considered as key references for the analyses include the 2021 Annual Government Plan – PES; Government 5Year Plan 2020-2024; Budget Execution Reports from the past 10 years; Medium Term Expenditures Review from the period of 2011-2021; Social Protection Strategies; Children National Action Plan; Census data (2017); Budget Household Survey (2014-2015); Poverty and Wellbeing Reports; CRC Concluding Observations and SDG Voluntary Report and other relevant statistical and scientific reports.

The Social Protection Budget Brief aim to:

* **To catalyse the discussion with the Ministry of Gender, Children and Social Action, Social Protection partners, Ministry of Economy and Finance, International Finance Institutions and Members of the Parliament on the need to scale up social protection and to better finance social protection schemes in order to respond to the socioeconomic multiple crises (COVID-19 pandemic, military conflict and natural disasters).** The analysis should provide an overview of the social protection situation context – providing a clear picture of the impact of the these multiple crises to the sector through macroeconomic lens; allocation and execution tendencies from past decade; and a verbatim landscape of the Social Protection composition in Mozambique, highlighting the different schemes, the coverage of each scheme, the bottlenecks, the challenges. Looking to the programmatic and implementation mechanisms.
* **Examine means to improve efficiency gains through better management of resources, including monitoring, reporting and accountability mechanisms.** Examine the strategic SP objectives and assess the progress so far to meet the sector goals and expenditure rates. Inform on the achievements of the sector on the major goals and objectives highlighted in the sector strategies and other national strategies. Provide evidence on the equity approach and per capita in the allocation of resources to the different provinces, with clear demonstrations.
* Discuss the capacity of the Government to mobilize resources to finance Social Protection programs and the cost of social protection in Mozambique. Ultimately discuss the coordination mechanisms, capacity to deliver, reporting and accountability mechanisms.

The Budget Memo aim to:

* **To inform UNICEF, parliament, Civil Society, academia, development partners and the public on the situation of Social Sectors in general in regard to PFM issues**. The Budget Memo will primarily discuss on macroeconomic issues of the 2022 budget proposal, including the fiscal policy, economic projections and the criteria for budget allocation to sectors and to provinces. Secondly the Memo will provide a snapshot of each of the four social sectors, which includes: Education, Health, Social Action and Water and Sanitation. The snap shot will include the trends of sectors allocation, the weight of each sector in the Budget proposal and in the GDP; the source of the resources and major goals of objectives for the fiscal year.

**METHODOLOGY AND TECHNICAL APPROACH.**

The methodology to be applied will be **desk review and consultations with key stakeholders**. The consultant will have to read the key relevant PFM instruments available in Mozambique, which include legal instruments, policies, strategies, operational plans and budget documents. Part of the desk review will be based on previous year’s [UNICEF budget briefs](http://budget.unicef.org.mz/english.html).

**Consultations through phone, skype or face to face meetings** with key stakeholders to be involved, which include UNICEF programme staff, partners from CSOs, Government and donor community will inform the analyses.

**ACTIVITIES AND TASKS.**

***Social Action 2021 Budget Brief:***

* Conduct analyses of the 2021 State Budget and produce the Social Protection budget brief;
* Results should be presented in word version with illustrative figures- graphs, tables, maps and diagrams. A separate excel sheet with all the data file, and a power-point summarizing the key points to highlight should be included as part of the deliverables;
* Produce in-depth analysis of the Social Action sector. Please see details of the analytical work required in the outline in annex A.
* Do data quality control of the text and all the graphs, tables, maps and diagrams in the Social Protection brief during the layout and designing phase. Layout and design will be under UNICEF responsibility.

Develop a 2-pager of main messages.

***Budget Memo of the 2022 Budget:***

* Produce an analysis of key facts of macroeconomic framework and the social sectors (Education, Health, Water and Sanitation and Social Action), with content and format based on previous year’s UNICEF’s Budget Memo 2021-2018 as per the outline in annex B;
* Revise the Budget Memo 2022 - once the Budget is approved to reflect any changes that may have occurred;
* Deliver all products in word, accompanied by excel sheet with all data file as well as the PowerPoint.

**DELIVERABLES AND PAYMENTS.**

Payments will be processed upon acceptance of the corresponding deliverable and against an invoice that will refer to the contract reference and deliverable number. Payments will be approved by the contract supervisor.

*Deliverable 1:*

Delivery timeframe (specify weeks, months or working days): End March 2021

Deliverable/product(s): **Social Protection budget brief preliminary version**

Payment (indicate amount or %): USD 0

*Deliverable 2:*

Delivery timeframe (specify weeks, months or working days): End May 2021

Deliverable/product(s): **Social Action budget brief – final version** and a 2-pager

Payment (indicate amount or %): USD 8,000

*Deliverable 3:*

Delivery timeframe (specify weeks, months or working days): 30th June 2021

Deliverable/product(s): **Quality assurance (data and text) of designed Budget Briefs 2021**

Payment (indicate amount or %): USD 500

*Deliverable 3:*

Delivery timeframe (specify weeks, months or working days): Mid-October 2021

Deliverable/product(s): **Budget Memo based on the 2022 Budget Proposal.**

Payment (indicate amount or %): USD 8,000

*Deliverable 4:*

Delivery timeframe (specify weeks, months or working days): End January 2022

Deliverable/product(s): **Revised Budget Memo based on 2022 Enacted Budget**

Payment (indicate amount or %): USD 2,400

All products must be delivered in English or Portuguese.

**MANAGEMENT AND SUPERVISION.**

Orientation and supervision will under the Social Policy Officer, with a close collaboration with the Social Policy Specialist and other members of the team. The consultancy will commence in the beginning of March 2021 and terminate in the end of February 2022.

**QUALIFICATIONS AND SPECIALIZED KNOWLEDGE.**

Advanced degree in Economics, Finance, Development Studies, Public Policies and other Governance areas.

**Work experience.** At least 4 years of relevant work experience in doing similar analysis.

Experience in doing budget analysis for UNICEF highly preferred.

**Specific knowledge, competencies, and skills required.**

* A solid knowledge of Mozambique PFM ecosystem and its instruments, and proven experience on similar analyses of the State Budget with focus on social sectors;
* Strong analytical and writing skills, and the ability to present the results in a simple language, making use of interesting visual aid (maps, graphs and other visual tools);
* Consolidated knowledge and foundation on crosscutting themes such as equity and sectoral decentralization;
* Ability to conduct benefit incidence analysis using Household Survey data and budgetary and population data.

**Language skills.**

* High proficiency in written English and Portuguese: Working knowledge of Portuguese is a must as most of the relevant national information and data are in Portuguese, and of English is also important as many documents and data for regional and global comparison are in English
* High capacity to digest financial statements and strategy documents and to present them in an appealing manner.

**CONDITIONS OF WORK.**

|  |  |  |
| --- | --- | --- |
| **Items** | **Provided by UNICEF** | **Remarks** |
| **Yes** | **No** |
| Service incurred death, injury or illness | X |  | Per the provisions of CF/IC/2013-001 on insurance coverage “in cases of service-incurred injury, illness or death under a third-party provider”. |
| Health Insurance |  | X | Consultants are to provide their own health insurance when the assignment requires traveling beyond commuting distance. |
| Office Space |  | X |  |
| Computer in office premises |  | X |  |
| Access to printer in the office premises |  | X |  |
| Airtime |  | X | Data up to: [Insert as applicable]Voice up to: [Insert as applicable] |

**IN-COUNTRY TRAVEL.**

NA.

**EVALUATION CRITERIA.**

The selection of the consultant will be based on a “best value for money” principle. Interested candidates should, in addition to submitting their CV and cover letter, indicate their all-inclusive fees (including travel, subsistence costs, etc.) for the services to be provided. The office shall select the individual who quoted the lowest fee from the list of individuals who are deemed technically suitable for achieving all tasks in time. The technical evaluation criteria are stipulated below.

|  |  |  |
| --- | --- | --- |
| **Item** | **Technical Criteria/Qualifications**  | **Max. Points** |
| **1** | **Education**  | **15** |
| **1.1** | Advanced degree in Economics, Finance, Development Studies, Public Policies and other Governance areas.  | 15 |
| **2** | **Work Experience**  | **25** |
| **2.1** | At least 5 years of relevant work experience in doing similar analyses | 15 |
| **2.2** | Experience in doing budget analyses for UNICEF  | 10 |
| **3** | **Technical Skills and Knowledge**  | **60** |
| **3.1** | A solid knowledge of Mozambique PFM ecosystem and its instruments, and proven experience on similar analyses of the State Budget with focus on social sectors (with examples) | 25 |
| **3.2** | Strong analytical and writing skills, and the ability to present the results in a simple language, making use of interesting visual aid (maps, graphs and other visual tools) | 15 |
| **3.3** | Improved ability to conduct benefit incidence analysis using Household Survey data and budgetary and population data (with examples) | 15 |
| **3.4** | Language skills: proficiency in Portuguese and English | 5 |
|  | ecblank**Total Technical Score** | **100** |
|  | **Minimum Technical for pass to financial assessment** | **70** |
|  | *Only those candidates meeting the minimum technical score will be eligible for further review.* |

**REMARKS.**

The application needs to be accompanied by concrete examples (publications, articles, discussion papers, etc) of analyses that show experience and competence to undertake this consultancy in line with the required qualifications described above.