TERMS OF REFERENCE

Statistical analysis of old age social protection options in Myanmar, and expert review

1.   Background

The proposal for a universal social pension in Myanmar has been on the table for some time. In late 2014, following a long period of consultation, the National Social Protection Strategy Plan (NSPSP) was approved. This included a proposed social pension as one of the NSPSP's flagship programmes, specifically via a benefit of MMK 25,000 to all older people aged 65 and over. While such a scheme is still not in place, the government has taken concrete steps towards implementing a social pension. In 2015 and 2016 a one-off payment was provided to all older people aged 90 years and over. In early 2017, it was decided that the 2017-18 national budget should include a regular payment of MMK 10,000 per month to all older people aged 90 and over.

These developments indicate clear commitment to move towards a universal social pension in the country, but are still far from the level of coverage or adequacy stipulated under the NSPSP. In the meantime, while the idea of a universal social pension is widely supported, there remains limited consolidated evidence on the role, impact and feasibility of a universal social pension in the country and options for financing.

To respond to this evidence gap, HelpAge International is conducting a study on the rationale for a universal social pension, its potential impact and issues affecting its feasibility (cost, financing, and implementation). The study is being undertaken as part of a HelpAge project providing technical support to the Ministry of Social Welfare, Relief and Resettlement, which is funded by the Livelihoods and Food Security Trust Fund. The intention is that the study will provide a valuable resource for the Ministry and other stakeholders to make the case for further budgetary investment in the social pension scheme. The final report will be completed by mid-July 2017.

The study will be led by a team from HelpAge International with support from external consultants on key pieces of analysis. This Terms of Reference relates to statistical analysis of existing national surveys in Myanmar, and expert review of the report.

2.   Purpose

To undertake statistical analysis of national datasets on issues of poverty, old age and the impact of social protection, and provide expert review of the report.

3.   Specific tasks for consultant/research team

The consultancy has two components:

Statistical analysis of national datasets in Myanmar

This component will entail analysis of existing datasets in Myanmar (household survey, labour force survey and a survey of older persons), including:

- Descriptive statistics on poverty and inequality based on the official methodology for poverty measurement. This should focus on poverty of older people, including disaggregation of results by age, location and sex, and of living arrangements of older people (e.g. living alone, living with spouse, living with children etc)
    - Measures of inequality should include both the Gini index and Palma ratio

- Testing the sensitivity of this poverty analysis to changes in equivalence scales.
- Microsimulation on the impact of a variety of social pension scenarios on poverty:
    - Scenarios will vary in terms of benefit level, age of eligibility and means tested approach. These assumptions will be developed in discussion with HelpAge.
    - The impacts will be presented in reference to the various demographic groups (age, location, sex, living arrangements) noted above
    - Where possible, microsimulation will also be undertaken in reference to alternative equivalence scales. Options for this will be discussed with HelpAge.
- Analysis of the working patterns of older people.
- Further analysis of dynamics relating to inter-generational transfers already assessed in the published report of the Survey of Older Persons (Chapter 6). The focus will be on visualising the results.

Expert peer review

The review will be undertaken by an international expert in the field of social protection and pensions. Key tasks will be:

- Meet with HelpAge staff (virtually) to discuss approach to report, and share ideas on potential framing of arguments
- Review final draft of the report (anticipated to be between 20-30,000 words) providing suggestions for strengthening analysis and presentation of data
- Respond to ad hoc requests for input on specific thematic issues

4.   Outputs/Deliverables

Key outputs of the assignment will be:

- **For the statistical analysis:**
    - An Excel workbook presenting full results of analysis
    - A full description of the methodology used for analysis. This can either be within the Excel book, or provided in a separate document.
- **For the expert review:**
    - A detailed review of the final draft of the report, including track changes/comments in line and a separate summary document outlining key areas of commentary. The reviewer should also be available to discuss feedback via a virtual meeting.

The assignment will be desk-based and will not require international travel.

5.   Time requirements and duration

The task will take place in April and May 2017, with the following specific deadlines

- Contract signed 5th May 2017

Statistical analysis

- Preliminary findings shared by 12th May 2017
- Final output by 2nd June 2017

Expert review
- Virtual meeting with HelpAge staff week of 8th May 2017
- Review of draft report during week of 22nd May 2017
- Ad hoc input up to 17th June 2017

6.   Budget

HelpAge is seeking expressions of interest with a budget in the range of US$15,000 – US$18,000.

7.   Qualifications/requirements of researcher/research team

HelpAge is seeking a consultant or consultancy able to deliver both activities within the terms of reference. This is to ensure alignment of statistical analysis and the expert review.

For statistical analysis

Essential
- Advanced degree(s) in field(s) highly relevant to the nature of the study (e.g. statistics, social science, economics)
- Over ten years experience of policy engagement and analysis on social protection
- Proven knowledge and thought leadership in the area of pensions and old age social protection more generally
- Significant experience of engaging with government at the highest level, including delivery of presentations and training
- Extensive knowledge of advanced statistical methods, including descriptive (non-inferential) analysis and micro-simulation using household survey data
- Experience of using microsimulation methods in analysis of social protection policy scenarios
- Experience of testing the sensitivity of poverty analysis to changes in equivalence scales
- Proven ability to clearly and accurately describe statistical methods used, and issues around quality and comparability
- Advanced experience of statistical software (e.g., Stata, SPSS, R)
- Excellent inter-personal and communication skills

Desirable

- Knowledge of issues relating to old age and demographic ageing
- Experience of microsimulation of means tested social protection schemes (building in assumptions around targeting errors)

8. How to apply

Interested consultants are invited to submit an Expression of Interest for delivery of the assignment. The short Expression of Interest (about 4 pages) should include:

1) Confirmation of availability to complete the entire assignment
2) Proposed methodology and any comments on the TOR
3) Clear work plan including timeframe for completion of each output/deliverable
4) Costing of each aspect.
5) Appendixes (not included in 4 pages)
   a. CV of the consultant(s)
   b. Contact information for 2 professional references
   c. Examples of 1-2 relevant studies previously produced

Selection of the consultant will be by a HelpAge project committee and based on the experience of the consultant, the quality and relevance of the expression of interest, and the proposed budget. Selection will be based on value for money, within resources available. Final negotiated fees will be specified in the consultancy contract.

The deadline for submission is midnight **Sunday, 30 April 2017**.Please contact Ms Chitlekar Parintarakul at **fon@helpageasia.org** for further information or to submit your EOI.