

Terms of Reference

Mapping of existing frameworks/policies and Legislation for Older People to expand their choice to remain economically active

HelpAge and Strategy 2030 – delivering real impact for older people

HelpAge International works with partners and a diverse global network of more than 171 organizations across 90 countries, supporting millions of older people to live safe, dignified and healthy lives. Through our partnership and collaborations, we work to ensure the inclusion of older people across society and strive to deliver a just and fair world for everyone, whatever their age. Our work is driven by our desire to deliver real impact for older people, to be inclusive, to work in partnership and to learn from our shared experience.

Our 2030 strategy *Ageing in a Just World* sets out how we will work together to shape the future we all share. By working together, we aim to help inspire a movement for change, and by promoting older people's wellbeing, dignity and voice, we can transform the lives of older people now and in the future.

As part of our 2030 strategy, we have a continued commitment to inclusive humanitarian action, supporting older people and their families at a time of crisis.

Alignment of Zambia' Ageing Policy to HelpAge Strategy

The Government of Zambia has in the recent past been increasingly concerned with the wellbeing of older people. There have been no sustainable programmes to adequately address the needs of older people, the Government is committed to support older people. In line with the 2030 strategy *Ageing in a Just World*, the Government has endeavored to pay outstanding pension arrears and increased the social cash transfer to ensure basic income security for the poor and vulnerable. The Government has been promoting lifelong learning to promote older people's wellbeing, dignity and voice and transform their lives.

Research background

Zambia is one of the poorest countries in the world, with over 54% of Zambia's population living below the national poverty line.¹ Zambia has been recently reclassified by the World Bank as a low-income country. According to the World Bank data¹, Zambia's life expectancy at birth is 62 years and the primary completion rate is estimated at 80%. The population of Zambia is relatively young, with only 2% of the population aged 65 years and older. However, Zambia's ageing population is expected to grow, and the old-age dependency ratio is projected to increase from 5.8% to 9.7% between 2015 and

¹ World Bank. (2022). Poverty headcount ratio at national poverty lines (% of population) – Zambia. Available at: https://databankfiles.worldbank.org/public/ddpext_download/poverty/33EF03BB-9722-4AE2-ABC7-AA2972D68AFE/Global_POVEQ_ZMB.pdf

2060.² The situation for older people in Zambia has been very challenging, with many facing poverty and a lack of access to essential services, including healthcare, microfinance, employment and social support. Older people are also exposed to abuse, neglect, and exploitation, particularly if they have disabilities or are living alone or due to weak inheritance and justice systems.

While some social protection mechanisms exist, they are largely insufficient and there is still much work to be done to ensure that older people in Zambia can enjoy a decent standard of living and are able to meaningfully participate on equal basis as other population groups in their communities. In Zambia, there are no mechanisms for older people who exit the labour market to remain economically active, as older people are often considered unproductive. Consequently, older people are often marginalised and excluded from social policy and social and economic empowerment programmes. A recent study also found that households headed by older people were more likely to be food insecure and had limited poverty coping strategy.³

Scope of work

Given the above background and older people's right to contribute to sustainable development as affirmed in the Declaration on the Rights to Development and 'leave no one behind' in Sustainable Development Goals (SDGs), Zambia's Ministry of Labour and Social Security (MLSS) is seeking to understand and conceptualise older people's contribution to sustainable development; design and develop a homegrown framework (Draft National Framework) to explore ways to promote an active and inclusive society that embraces the contributions of older adults as productive members of their community. As a key activity under this objective, the consultant will be tasked with carrying out the mapping of existing frameworks/policies and legislation for older people to expand their choice to remain active (with a focus on productive activity - including employment and all paid and unpaid activities that create goods or services of value).

This research is expected to inform Zambia's national policy and programming to ensure that the relevant integrated labour and social protection policies and legal and administrative frameworks are appropriate, inclusive and effective for older people. Thus, the study will map out all relevant policies, frameworks and legislation, identify gaps in labour and social protection policies, laws and administrative frameworks, assess coordination and linkages, appropriateness and sequencing of these, and provide recommendations for inclusion into the Draft National Framework.

² Moyo N, Nanyangwe-Moyo T, Mapoma CC, et al. The population of Zambia: past, present and future. Research Square; 2022. DOI: 10.21203/rs.3.rs-1617840/v1.

³ Bulawayo, M., Ndulo, M., & Sichone, J. (2019). Socioeconomic Determinants of Food Insecurity among Zambian Households: Evidence from a National Household Survey. *Journal of Asian and African Studies*, 54(6), 800–818. <https://doi.org/10.1177/0021909619841655>.

Research activities

The research will focus on the following:

- 1) **Reviewing and mapping the labour, social protection as well as relevant legal and administrative frameworks and policies covering/relevant to older people.**

What systems, policies, laws and schemes may affect older workers' decision to remain economically active? What are the key policy, regulatory and administrative barriers to accessing formal jobs and informal employment opportunities in Zambia? barriers

This research would be carried out through a desk review of literature as well as a review of relevant policies and programmes, regulatory and administrative frameworks, and, if needed, would be complemented by key informant interviews (KII).

- 2) **Reviewing existing evidence and information from research studies and reports documenting constraints that older people experience in accessing jobs.** What are the key economic and sociocultural barriers to accessing formal jobs and informal employment opportunities, including gender norms and roles, stigma and discrimination?

- 3) **Recommendations for specific interventions to be included into the Draft National Framework.**

Based on the study findings and the validation workshop, distil the key factors affecting older people's choice to remain economically active and recommend specific policy, legal, administrative and programmatic interventions to be included into the Draft National Framework (informing the development of a mechanism for expanding choices of older workers to help them remain economically active through identification and utilisation of their skills).

Research deliverables

- 1.1 A research report (between 35 and 40 pages, including references, tables and figures) entitled "Mapping of existing policies and legislation for Zambia's older people to expand their choice to remain economically active".
- 1.2 A policy brief to summarise the findings in the report.

The format of the research document should have the following sections.

- a) Executive summary
- b) Introduction
- c) Research methodology
 - Approach
 - Methods of data collection
 - Limitations

- d) Research findings
 - I. Reviewing and mapping key policy, regulatory and administrative barriers to accessing formal jobs and informal employment opportunities.
 - II. key economic and sociocultural barriers to accessing formal jobs and informal employment opportunities, including gender norms and roles, stigma and discrimination.
 - III. Reviewing and synthesizing information and evidence from literature
 - IV. Challenges to be addressed to ensure that older people have better access to employment opportunities.
 - V. List of contents to be included in the Draft National Framework to ensure that all the required contents are included.
- e) Conclusion and recommendations

Timeframe

- Start working as soon as possible.
- The study will be conducted in July – September 2023
- The total working days is 20 days. Timeframe extension is possible due to the deliverables required.

Consultancy Fee

- Maximum GBP200 per day – depending on the experience and knowledge of the consultant.
- The consultant shall be responsible for all tax, bank fees and other expenditures by own.

Payment method

Payment will be based on submission of deliverables that are satisfactory and have been assessed by the HelpAge team to be of satisfactory quality.

The following payments will be paid to the consultant using an agreed mode of payment.

- 30% of the contract value after the submission and approval of the inception report
- 30% of the contract value after the submission and approval of the Interim report
- 40% of the contract value after the submission and approval of Final Report

Qualifications and experience required

- a) Post-graduate degree in social sciences, economics, public policy, law or a related field.
- b) Minimum of 5 years' relevant professional experience in social sciences, social protection and research.
- c) Strong background and experience in data collection and analysis.

- d) Technical expertise in evaluating labour laws and policies, social protection, advocacy and rights programmes; and ability to draw strong and valid conclusions.
- e) Excellent communication and report writing skills.
- f) Firm/Consultant with presence in the programme locations will be an added advantage.
- g) Fluency in English and Bantu.

Ethics, safeguarding and code of conduct

The consultant will be working on behalf of HelpAge and will be required to sign and adhere to the Safeguarding Policy and ethical guidelines.

The consultant will make clear to all participating stakeholders of all ages that they are under no obligation to participate in the exercise and that it is purely voluntary. All participants will be assured that there will be no negative consequences if they choose not to participate.

The consultant must obtain informed consent from all participants. The consultant must receive prior permission for taking and use of visual still/ moving images for specific purposes.

The consultant will assure the participants the anonymity, confidentiality and will assure the visual data is protected and used for agreed purpose only. As regards the documentation, the title rights, copyrights and all other rights of whatever nature in any materials used or generated under the provisions of this consultancy will exclusively be vested with HelpAge International.

Equal Opportunities

HelpAge International is committed to creating an inclusive working environment, promoting and providing equal opportunities and respecting diversity in employment. We welcome applications from all suitably qualified individuals regardless of their age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

Safeguarding

Everyone has a role in creating and sustaining a safe and respectful working environment, where no one comes to any harm or is maltreated. At HelpAge we take our responsibilities very seriously and will take action against wrongdoing. We will do everything we can to ensure that we do not engage people that pose a safeguarding risk and will undertake criminal record checks as required.

Diversity & Inclusion

HelpAge International is dedicated to creating a diverse and inclusive environment for all its employees/consultants while extending the culture of inclusion into our work.

We believe that our workforce should reflect the wide diversity of the communities we serve, and that diverse voices should be elevated and intentionally integrated into our work. We embrace difference and diversity of identity, experience, and thought, and actively strive for inclusive behaviors across our organization and work regardless of gender, race, disability, age, nationality, ethnic/national origin, sexual orientation, religious beliefs, marital status, pregnancy, social status, and political beliefs.