

Notice Amending the Terms of Reference for Thematic Papers and Policy Briefs

Social Economy Policy Project

The International Labour Organisation recently circulated Terms of Reference calling for proposals for Thematic Papers and a Policy Brief Series as part of the Social Economy Policy Project. The closing date for applications was May 28 2018.

The ILO would like to advise applicants that it has decided to merge these two objectives instead of commissioning them separately i.e.: we will be commissioning researchers / organisations to write a thematic paper and the associated policy brief/s. We believe that this is a far more effective approach.

Organisations / researchers that submitted proposals for both the thematic paper and policy brief **need not re-apply**. Their proposals have been considered together.

Organisations / researchers that submitted for either the thematic papers **OR** the policy briefs (not both) are invited to e-mail the policy team a MS Word / PDF document that briefly outlines

- Their interest in being considered for the combined commission: thematic paper + policy brief/s
- Any additional information they think is necessary for the combined proposal.
- Chosen research areas.
- A revised work plan
- A revised budget

The deadline for this revision to be received is Friday 08 June 2018, 11h59am.

****Please note, this resubmission is only for those who did not apply for both the Thematic Paper and Policy Brief.**

The budget for this revised assignment is drawn from the rates already circulated and is included here for reference:

Thematic Paper	USD 6,375
Policy Brief	USD 1,588
Total	USD7,963 / USD 8.000

The terms and conditions associated with this commission, as circulated in the Terms of References, remain the same.

The contact details of the project team:

Kerryn Krige krige@ilo.org
Chriselda Tabane Tabane@ilo.org

Please request a delivery and read receipt with all e-mail correspondence.



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Terms of Reference:

**Developing a Series of Policy Briefs to inform the development of a Social Economy
Policy in South Africa**

1. Background

The Social Economy in South Africa is an area of growing interest, which brings the best of civil society together with the best of business. The result is organisations that deliver social value in a sustainable way – our co-operatives, social enterprises, and non-profits who trade.

The Government of South Africa is committed to growing the potential of the social economy in South Africa, with commitments in both the New Growth Path and the National Development Plan. For example, the New Growth Path (NGP) adopted in late 2010 by the South African Government identifies social economy development as one pillar of the national development strategy framework. And the Decent Work Country Programme (DWCP) drawn up by organized business, organized labour, Community and Government in consultation with ILO and governed by the National Economic Development and Labour Administration Council (Nedlac) identifies the development of the social economy as a strategic means leading towards the creation of jobs in sustainable enterprises.

The Department of Economic Development together with the ILO is working to deliver a policy that will enable the ecosystem for the social economy, allowing it to thrive. This three year project works across three pillars:

- To recommend regulation that will enable the social economy ecosystem to thrive
- To stimulate support from business government and civil society to enable the social economy to thrive
- To encourage participation in the social economy, achieving job creation and social and economic growth.



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This policy development project builds on several years of foundational work to strengthen and stimulate the social economy in South Africa. This includes a number of pilot projects in KZN and the Free State exploring public procurement as a means to stimulate the social economy, training organisations to better respond to these opportunities, and the testing of new social economy enterprise models that reduce barriers to market entry.

The ILO is seeking the services of a service provider to develop the first in a series of policy briefs, which will be used in advocacy work for key policy makers including governments, business and with Civil Society, during and after a National Consultation Session planned for August / September 2018 (date to be confirmed). The first Policy Brief Series – a set of five policy briefs - will help guide the discussions and assist policy makers in undertaking informed policy decisions with regards to the broader societal impact of the social economy.

2. Purpose of the Assignment

The purpose of this assignment service is to develop a Policy Brief Series from a broad range of materials and reports, and other relevant publications on the social economy in South Africa. The following topics have been identified for the policy brief series. Please note that the final five policy briefs will be agreed together with the commissioned consultant.

Policy Brief Series 1: What is the social economy in South Africa?

Possible topics could include:

1. Definition of the Social Economy in SA, with the goal of creating a working definition for the policy process.
2. Opportunities and threats for the growth of the social economy in South Africa. What needs to be done to realise the potential of the social economy in SA?
3. Supporting the growth of the social economy in South Africa: points of strength and points of weakness



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Policy Brief Series 2: Social economy organisations in South Africa

Possible topics could include:

4. Understanding the regulatory environment in South Africa: the organisations that make up the social economy.
5. Supporting the growth of social economy organisations in South Africa: points of strength and points of weakness
6. Managing tensions between profit and purpose: dilemmas and difficulties of South Africa's social economy organisations.

Policy Brief Series 3: Scaling the work of the social economy

Possible topics could include:

7. Connecting impact and income: the social economy and systemic change
8. Does size equal success in the Social economy in South Africa? When does scaling work, and when does it fail?
9. Models for scaling

Policy Brief Series 4: Social Impact Measurement for the social economy

Possible topics could include:

10. Defining social return – how social economy organisations measure their success.
11. Barriers to growth: the difficulties in measuring success in the social economy
12. Does size equal success in the Social economy in South Africa? When does scaling work, and when does it fail?

Policy Brief Series 5: Innovative finance to catalyse the social economy in South Africa.

13. Models for innovative finance in South Africa
14. Funding and financing of the social economy – looking back, looking forward. What's worked and what hasn't.
15. Impact investing and social return on investment.



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3. Tasks of the collaborator / consultant

The Consultant, or consulting company, will perform the following tasks in the process of developing the policy brief:

- a) Review available study reports done by the ILO and other relevant documents.
It must be understood that the field is nascent in South Africa and we are building knowledge specific to the South African context.
- b) Literature review on the social economy including relevant ILO Recommendations and documents¹;
- c) Desk review of statistical data and information on initiatives related to enabling the eco-system for the social economy
- d) Seek feedback from ILO , its tri-partite constituents and other stakeholders (as advised by the ILO);
- e) Seek review comments to the draft policy brief from national experts (as advised by the ILO);
- f) Incorporate review comments and suggestions;
- g) Present draft policy briefs for input and comments
- h) Submit the final policy brief series

The ILO will cover the costs of proof reading, design and printing separately.

¹ For example:

- Best practice case studies (ILO 2016)
- Best practice case studies from South Africa (ILO 2016)
- Access to finance for social entrepreneurs in South Africa (ILO 2016)
- Potential and limits of Social and Solidarity Economy (UNRISD 2013)
- Social and solidarity economy: our common road towards Decent Work (ILO 2011)
- Policy Brief 10: The resilience of social and solidarity enterprises – the example of co-operatives (ILO 2010)
- Steinman, S. (2010) *An exploratory study into factors influencing an enabling environment for social enterprises*. Johannesburg.



4. Structure of Policy Brief Series

This work is commissioned as a series of five policy briefs. Collaborations are encouraged to ensure expertise is applied to different subject areas. Each policy brief should be:

- At least 2000 words (approx. five pages), with referencing as Endnotes. One page at the end will be reserved for a list of documents /reports reviewed and a brief introduction of the Social Economy Policy Project, and other general information.
- General headings that can be applied:
 - Executive Summary
 - Description of the policy challenges
 - Statistics / quantitative data that supports this description
 - Policy options to address the challenges
 - Examples that illustrate the issue. Examples that illustrate the solution.
 - Identified bottlenecks that hinder the development and growth of the sector
 - Conclusions and recommendations
 - “Key facts” fact box
 - Recommended reading
 - Sources

Guidelines that can be applied to the Policy Brief Series:

- Conclusion should include numbered recommendations to the South African government on how to best support the development and growth of the social economy.
- Figures and diagrams are recommended
- Photographs and quotes in high resolution
- Contributors (individuals and institutions) should be acknowledged
- The appointed consultant/s will be requested to participate at a National Consultation, dates to be confirmed.



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5. Required skills, competencies and experience

The Consultant/s is required to have:

- Sound technical background and experience in the social economy in South Africa;
- Sound experience and knowledge on the work done by the ILO on the social economy in South Africa
- Excellent written English and interviewing skills and techniques.
- A track record of professional experience working in the social economy or with social economy organisations; especially in the production of written reports and research.
- Ability to deliver content for high-impact reports
- Experience of developing policy briefs will be advantageous;
- Understanding of the South African government's policies on Small Business Development, Economic Development and related policies and regulations is an advantage.
- Understanding of on-going debates/discussion and on the challenges facing the social economy is an advantage.

6. Budget

Please provide a budget with your submission. The **total budget for this commission is USD 8,500** (approx. ZAR 20,000 per policy brief)

7. Contract duration

The contract is envisaged to start on the 01 June 2018 and will end on the 31 August 2018. Deadlines will be agreed at the contracting phase but are planned as follows:

- i. Draft outline of the Policy Brief Series by 28 June 2018
- ii. 2nd Draft policy brief 21 July 2018
- iii. 1st Final draft policy brief incorporating inputs from the Consultation session.



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8. Payment Schedule

The ILO will pay a lump-sum contract as follows:

- First payment (30%): Upon Signature of the Contract; with submission of an approved work plan.
- Second payment (50%): Upon receiving a copy of the 2nd draft of the policy brief.
- Third and final payment (20%): upon receiving the copy of the final version of the policy brief with inputs from the Consultation session

9. Submission of proposal

Please submit your interest and motivation for this assignment to the ILO. Applications must not be longer than five pages and must outline:

- Topics / Policy Brief Series themes where you would like to work, and motivation as to why these should be the first thematic areas that are delivered as policy briefs.
- Your experience working with / in the social economy
- Your experience working in the thematic areas selected
- Any examples / evidence of similar work.
- Any difficulties you may have achieving the deadlines above.
- Two references
- Budget and work plan

The closing date for submission of proposals is **28 May 2018 by close of business**.

All deliverables and reports must be submitted to the Chief Technical Adviser of the Social Economy Policy Project by e-mail: krige@ilo.org attention Kerry Krige, with Chriselda Tabane copied (tabane@ilo.org).



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Your submission will be confirmed by e-mail. If possible, please request a delivery receipt with your mail

Please refer any questions to: Kerry Krige on krige@ilo.org

All queries are to be made in writing and will be shared with the broader group invited to apply.

ENDS

14 May 2018



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Terms of Reference
**Developing a series of Thematic Papers to inform the development of a Social
Economy Policy in South Africa**

1. Background

The Social Economy in South Africa is an area of growing interest, which brings the best of civil society together with the best of business. The result is organisations that deliver social value in a sustainable way – our co-operatives, social enterprises, and non-profits who trade.

The Government of South Africa is committed to growing the potential of the social economy in South Africa, with commitments in both the New Growth Path and the National Development Plan. For example, the New Growth Path (NGP) adopted in late 2010 by the South African Government identifies social economy development as one pillar of the national development strategy framework. And the Decent Work Country Programme (DWCP) drawn up by organized business, organized labour, Community and Government in consultation with ILO and governed by the National Economic Development and Labour Administration Council (Nedlac) identifies the development of the social economy as a strategic means leading towards the creation of jobs in sustainable enterprises.

The Department of Economic Development together with the ILO is working to deliver a policy that will enable the ecosystem for the social economy, allowing it to thrive. This three year project works across three pillars:

- To recommend regulation that will enable the social economy ecosystem to thrive
- To stimulate support from business government and civil society to enable the social economy to thrive
- To encourage participation in the social economy, achieving job creation and social and economic growth.

This policy development project builds on several years of foundational work to strengthen and stimulate the social economy in South Africa. This includes a number



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of pilot projects in KZN and the Free State exploring public procurement as a means to stimulate the social economy; training organisations to better respond to these opportunities, and the testing of new social economy enterprise models that reduce barriers to market entry.

The ILO is seeking the services of a service provider to develop a series of thematic papers which will be used in advocacy work for key policy makers including governments, business sector and with Civil Society Organizations, during and after a National Consultation Session planned for August / September 2018.

The Thematic Papers will help guide the discussions and assist policy makers in undertaking informed policy decisions with regards to the broader societal impact of Social and Impact Entrepreneurship. They are more detailed than policy briefs and should be regarded as accessible, readable pieces of research.

2. Purpose of the Assignment

The purpose of this assignment is to commission a number (minimum three) Thematic Papers that provide substantive insight into areas of the social economy in South Africa. Because this is a nascent field, substantial desktop research will be required with possible focus groups / action research approaches. The following topics have been suggested for individual thematic papers by the organising team:

1. Synthesis report: background to and scoping of, the Social Economy in South Africa (including definitional discussion).
2. Analysis: International Lessons – what can we learn about the growth of the social economy from countries other than our own.
3. Current regulatory and public policy environment: A map of existing policies that enable the social economy in South Africa, identifying where the policy gaps are.
4. Challenges and opportunities to developing the Social Economy in South Africa
 - a. Recommendations and approaches.
5. Funding and financing of the social economy in South Africa: mapping of the financing eco-system in South Africa, identifying areas of strength and weaknesses and

The Policy team encourage recommendations from applicants on possible research areas.



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3. Tasks of the collaborator

The Consultant will perform the following tasks in the process of developing the thematic papers:

- a) Review available study reports done by the ILO and other relevant documents that inform and influence the development of the social economy in South Africa (e.g.: The New Growth Path, The National Development Plan, The Co-operatives Act etc.).
It must be understood that the field is nascent in South Africa and we are building knowledge specific to the South African context. It will be important to write what it is we know, and at the same time, what we don't.
- b) Desk review of statistical data and information on initiatives related to enabling the eco-system for the social economy
- c) Seek review comments to the thematic paper through a reference panel to be identified by the ILO ;
- d) Incorporate all review comments and suggestions (a maximum of three rounds of reviews is recommended);
- e) Submit the thematic paper to the ILO

The ILO will cover the costs of proof reading, design and printing separately.

4. Structure of the Thematic Paper

The Thematic Paper should be:

- At least 6,000 words (no less than 10 pages, up to 20 pages) (one page at the end will be reserved for a list of documents / reports reviewed and a brief introduction of the Social Economy Policy Project, and other general information).
- Include case studies as examples from the research process.
- The Thematic Papers will feed into the Discussion Document going into the policy process, and ultimately the foundation of the Green Paper.

5. Outline

- Introduction and context
- Key Messages
- Issues identified
- Analysis of issue



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- Summary of findings and recommendations
- Bibliography
- Appendix (Research Methodology)

6. Required skills, competencies and experience

The key required skills, competencies and experience are summarised as:

- Sound technical background and experience in the social economy in South Africa;
- Sound experience and knowledge on the work done by the ILO on the social economy in South Africa
- Excellent written English and interviewing skills and techniques.
- An understanding of research method, ethics and approaches.
- A track record of professional experience working in the social economy or with social economy organisations;
- Ability to synthesise information from a wide range of sources.
- Ability to present complex information in a manner that is accessible to a broad range of stakeholders.
- Experience of working in the policy environment will be advantageous;
- Understanding of the South African government's policies on Small Business Development, Economic Development and related policies and regulations;
- Understanding of on-going debates/discussion and challenges facing the Social Economy in South Africa

7. Budget

The **total budget available per thematic paper is USD 6,375**. A minimum of three thematic papers are to be commissioned.

8. Contract duration

Starting date: The contract is envisaged to run from the 01 July – 30 September 2018.

9. Expected Outputs

- i. Draft outline of the Thematic Paper by 20 July
- ii. 2nd Draft Thematic Paper 10 August
- iii. Final Thematic Paper 26 September



10. Payment Schedule

The ILO will pay a lump-sum contract as follows:

- First payment (30%): Upon Signature of the Contract; and agreement of work plan and deliverables
- Second payment (50%): Upon receiving a copy of the 2nd draft of the thematic paper
- Third and final payment (20%): upon receiving the copy of the final version of the thematic papers with inputs from the knowledge sharing workshop (if agreed)

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11. Submission of proposals and reports

Please submit your interest and motivation for this assignment to the ILO. Applications must not be longer than five pages and must outline:

- Topics / Thematic area where you would like to work
- Your experience working with / in the social economy
- Your experience in delivering research in the social sciences
- Any examples / evidence of similar work.
- Any difficulties you may have achieving the deadlines above.
- A budget
- A work plan (deliverables and deadlines)

The closing date for submission of proposals is **28 May 2018** by close of business.

Your application must be submitted to the Chief Technical Adviser of the Social Economy Policy Project by e-mail to kridge@ilo.org and tabane@ilo.org.

Please put in the subject line what you are applying for (Thematic Paper and Topic).

Your submission will be confirmed by e-mail, but we recommend you request a delivery receipt with your mail.

If you have any questions please contact: Kerry Krige on kridge@ilo.org.
All questions will be answered in writing.