

**Component 2 macro-activities**

(Annual Work Plan 2017 – Macro-Activity 2.4; 2.6)

***Study of the legislation regulating the Long-term Care  
system in Italy and France***

**Topic 2.1.6**

**Development of Old-age Services and Long Term Care System**

**TERMS OF REFERENCE (ToR)**

## 1. **Background**

### 1.1 **General**

The purpose of the EU-China Social protection reform project (“the Project”) is to contribute to the improvement and inclusiveness of China’s social protection system through strengthening the institutional capability for developing policies, for implementing legal and regulatory frameworks and for supervising systems of social insurances, social assistance and financial management in the area of social security. In particular, the Project’s purpose will be pursued through the following three components in relation to which specific Chinese government entities playing the role of partner of the consortium have been identified:

- i. Component 1: Consolidation of institutional capacity for social protection policy development and reforms in collaboration with the National Development and Reform Commission (“NDRC”);
- ii. Component 2: Enhancing of institutional capacity for financial management and supervision concerning social security funds in collaboration with the Ministry of Finance (“MoF”); and
- iii. Component 3: Improving of legal framework and policy for social assistance in collaboration with the Ministry of Civil Affairs (“MoCA” and, together with NDRC and MoF, the “Chinese Ministries”),

**These ToR fall under Component 2 of the project.**

## 2. **Description of the Assignment**

### 2.1. **Overall and Specific Objectives**

#### *2.1.1 Overall Project Objectives*

The overall scope of the SPRP project is to further develop social equity and inclusiveness of economic development throughout Chinese society. For the Component 2, the main target is to enhance the institutional capacity for financial management and supervision concerning social security funds.

In 2017, the Component 2 will analyze the following three topics:

2.1.4 An integrated system for the coordinated management of the social assistance system

#### **2.3.1 Development of Old-age Service Industry and Long Term Care System**

2.3.2 Investment strategies of social funds and risk control methodologies

**These ToR are for the topic 2.3.1**

#### *2.1.2 Specific Objectives*

China is affected by demographic trends brought about by an extremely fast demographic transition and by deep socio economic changes that have affected the traditional structure and role of the family.

The Chinese Government has already emphasized the need for the development of old age services and Long-Term Care system. The 13th Five Year Plan stresses the necessity to establish a multilevel elderly care service system based on at-home care, supported by communities, and supplemented by elderly care institutions; the enforcement of coordinated plans for building public-interest elderly service facilities and support the building of nursing homes and community day-care centers for disabled elderly persons; establishing systems for providing subsidies for very elderly persons and senior citizens suffering from loss of physical and/or mental capacity, who are experiencing financial

difficulties; exploring the establishment of insurance schemes for long-term care and begin launching trials in this regard, etc.

Up to now, China still does not have a comprehensive structure for the old age service delivery and a consolidated long-term care policy/regulation. China still lacks a consolidated model of LTC and this results in a situation largely fragmented in terms of legislation, distribution of power between different institutions, departments cooperation, organization of the structure for the delivery of services, etc.

The followings weak points have been identified in the literature:

- ❖ Community-based old age care services remain largely nonexistent, except in a few major urban centers like Shanghai
- ❖ Policy initiatives to support home or community-based care have been largely limited to urban areas, and even there, the number of beneficiaries is still relatively small.
- ❖ In much of rural China, the development of home and community-based services faces many practical challenges because of the physical environment and the lack of resources and infrastructure.
- ❖ Current practice and policy directions in rural areas favor institutions by encouraging “centralized support and care” in rural homes for the aged that are run, or subsidized, by the local county or township government-

The main challenges are the followings:

- To define methodologies to assess elders’ health care needs and criteria to allocate public funds while ensuring the provision of appropriate services to meet the needs of frail elders
- Design policies and create an environment that will encourage private and non-profit organizations to establish institutional care facilities
- Create a more equitable market competition between government-sponsored welfare institutes and those that are private, non-government-sponsored, eventually by direct cash payment to eligible individuals (e.g., wubao elders)
- Integrate different Long-Term Care policies and programs in a better way
- Set up reasonable and sustainable financing mechanisms for guaranteeing the development of the Long-Term Care system and more specifically encourage private capital to take part in the development of the old-age service industry
- Prioritize education and training initiatives to grow a professionalized long-term care workforce.

### 2.3 Requested Services

The Grant application form indicates that “Comparative studies of EU Member states, specific insights and detailed studies (... will be conducted) to investigate on issues related to the options selected (...). These Terms of Reference provide for the completion of an in-depth study on the legislation regulating the LTC systems in France and Italy, to be submitted as background paper for the Workshop planned in January 2018.

The Expert will take all necessary action to provide a study to the satisfaction of the Project represented by the Component 2 coordinator (INPS) on the above-mentioned topic. The expert will perform his/her assignment in collaboration with the C2 Resident Expert. The expert will submit a midterm draft for comments and amendment suggestions by the project team.

If available, he/she will also take part in the dedicated Workshop to be organized in Beijing.

### 2.4. Outputs

- a Report of around 50 pages, in English
- an abstract of the Report in English

The expert will also, if available, present the main contents of his/her works during a Workshop in Beijing in January 2018.

### 3. Procedure and Selection criteria

This call for interest is primarily intended at research and other institutions located within one of the Consortium member countries.

Criteria for selection are summarized in the table below.

Requirements incumbent institution	Requirement/Asset
Proven experience in conducting comparative research at European level in Social protection and Labour market fields	R
Publication/research record in English language	R
Previous participation in international research projects	R
Knowledge of Chinese labour market and social protection context	A
International network of labour market and social protection correspondents	A
Based in one of the Consortium members 'countries	A

Entities from the Consortium are as follows: from **Italy** INPS – National Social Security Institute; from **Belgium**, Federal Public Service Social Security; from **Poland**, Ministry of Family, Labour and Social Policy (MRPiPS); from **Romania**, Ministry of Labor, Family, Social Protection and Elderly (MoLFSPE); from **Spain**, Ministry of Employment and Social Security (MEySS) and International and Ibero-American Foundation for Administration and Public Policies (FIIAPP); from **France**, EXPERTISE FRANCE. Associates of the Applicant also participating in the action are Scuola Nazionale dell'Amministrazione (National School of Administration) from Italy and the Ministry of Labour and Social Affairs of the **Czech Republic**.

Requirements for Experts	Requirement/Asset
<b>Qualifications and skills</b>	
University Degree within the relevant sectors of Demography, Social Protection, Law, Political Science, and Economics	R
Excellent organizational, communication, writing and interpersonal skills	R
Strong analytical and drafting skills	R
Previous experience in execution tasks in other international projects	A
Fluent in English both verbally and writing	A
Ability to develop and maintain good professional relations with stakeholders, particularly counterparts and staff members in an international setting	R
<b>General professional experience</b>	
At least <b>5 years</b> of experience working in areas related to Social Protection and/or Employment policies	R
Public servant within one of the Applicant Entities of the Consortium or staff from public institutions cooperating with the Applicant Entities of the Consortium or researcher from the research institution outside Consortium. Public servants and staff from public institutions cooperating with the Applicant Entities who fulfill the requirements take precedence over candidates outside Consortium.	R
Previous working experience in international projects, preferably with EU funded projects	A
Previous working experience in China	A
<b>Specific professional experience-related to action</b>	
Possessing professional experience relevant to the ToR for his/her specific assignment	R
Previous experience in research or previous publications in the area of social sciences	A

A team of experts can also conduct the research study in a coordinated manner and submit just one

application for all the members of the group, by clearly indicating the division of work among the experts.

#### 4. Location, Duration and Budget

Location:	Expert's country. If visits to other places are required, cost is to be covered by the honorarium.
Timing:	The first draft of the report to be delivered by November 30 <sup>th</sup> 2017, finalized version by 30 <sup>th</sup> December 2017.
Working days:	----
Budget	Honorarium lump sum, 8.000 euros. The honorarium is for the outputs required (see 2.4 above). If a team of Experts will be selected, the sum above will be shared among them, according to the criteria that will be illustrated in the contract. If the Expert takes part in the dedicated Workshop in Beijing, cost is to be covered by the honorarium.

#### 5. How to apply

Interested expert or group of experts is requested to submit three documents:

1. Candidacy – Letter of intents
2. A CV in English (Europass format suggested), pdf. Format (for each expert)
3. A copy of the Identification Document (for each expert)

Applications are to be sent to the Component 2 Coordinator, Ms. Valeria Bonavolontà: [valeria.bonavolonta@inps.it](mailto:valeria.bonavolonta@inps.it) and to the Component 2 Resident Expert, Mr. Michele Bruni: [Michele.bruni@eucsprp.org](mailto:Michele.bruni@eucsprp.org) by or before 31<sup>st</sup> of October 2017.

#### 6. Personal data protection

INPS – Istituto Nazionale della Previdenza sociale, based in Rome (Italy), Via Ciro il Grande 21, is the Responsible of personal data processing, as EU-China SPR Project Leader and Component 2 Coordinator. INPS informs you that your personal data contained in the application for the present ToR will be processed by the Component 2 Resident Expert of the EU-China SPR Project, his assistant and INPS employees involved in the EU-China SPR Project – Component 2, in compliance with the Italian Legislative Decree no. 196 dated 30/06/2003 on personal data protection, in order to process your application to the selection.

Your personal data will be processed also with electronic instruments. Your data will be communicated to other public or private Institutions only in cases provided by the Italian laws. INPS informs you that, in accordance to art. 7 of the above mentioned decree, you are entitled, in particular, to have access to your personal data, to request rectification, updating or deleting of information if data are incomplete or wrong. You should contact INPS at the e-mail address: [Comp2.InpsProgettoCina@inps.it](mailto:Comp2.InpsProgettoCina@inps.it) to exercise the rights provided in art. 7.