TERMS OF REFERENCE

CONSULTANCY FOR THE DEVELOPMENT AND PILOTING OF

THE AFRICAN TRADE UNION PEACE AND SECURITY BAROMETER

Contracting organisation: ITUC-Africa
Technical lead: Africa Labour Research and Education Institute (ALREI)
Duration: 12 weeks from the agreed commencement date

Background and Overall Objective

The African Trade Union Peace and Security Barometer assesses peace and security through the experience and contribution of working people. It examines violence and insecurity, conflict-related disruption of work, displacement and social cohesion, and worker participation in peacebuilding and recovery. Its continental mandate covers all African countries.

The consultancy develops the framework, indicators and practical tools, pilots them in three to seven countries, validates the findings and methodology with stakeholders, and publishes the pilot results. It prepares ALREI for annual continental publication, with a six-month update where resources and fresh evidence permit.

The design combines existing institutional and secondary evidence with targeted primary research. Its contribution is a labour perspective on peace and security, without reproducing the ITUC Global Rights Index (GRI), other established publications or an operational early-warning system.

Scope and Pilot Coverage

Select the pilot countries with ALREI at inception, considering regional and language diversity, peaceful and conflict-affected settings, data availability, affiliate capacity and safe participation. The approved budget determines the number within the mandatory range of three to seven countries.

Prepare an all-country coverage and source-availability matrix, including countries without ITUC-Africa affiliates. Detailed data collection and findings under this contract cover the pilot countries; they cannot be generalised as representative of Africa. Full continental collection and subsequent editions require separate funding.

The scope includes methodology and tool development, pilot research, a policy dashboard, validation, publication and handover. It excludes continuous surveillance, real-time alerts, forecasting, emergency-response operations and custom software. A composite score or country league table is not required.

Key Questions

- Where and how do conflict, violence and insecurity affect workers, workplaces and safe access to livelihoods?
- How do displacement and tensions between communities affect working people, and what sustains peaceful relations?
- How do workers and unions contribute to peace processes and recovery, and what evidence exists of their reach and results?
- Which indicators and tools are useful, comparable and affordable enough for repeated continental application?

Analytical Framework and Indicators

Use a repeated cross-sectional design with a manageable core of indicators across four domains. Each edition presents a dated snapshot; subsequent comparisons require compatible definitions and periods. The following measures are candidates for pilot testing, not predetermined scores.

Domain	Indicative measures
Violence and insecurity affecting working people	Documented violence affecting workplaces or routes to work; sampled workers' safe access to work; threats or coercion associated with conflict or political violence.
Conflict disruption of work and livelihoods	Days of work lost because of specified insecurity; conflict-related workplace or market closures; disruption of essential services needed for work, with causes recorded.
Displacement and social cohesion	Conflict-related displacement context; displaced workers' barriers to safe work or return; exclusion or violence between communities, alongside evidence of cooperation.
Participation in peacebuilding and recovery	Actual worker representation in peace or recovery bodies; dialogue and mediation addressing conflict tensions; protection, reconciliation or livelihood-recovery initiatives and their documented results.

For each indicator, define the peace and security question, labour connection, unit, source, observation period, geographic coverage, disaggregation and limitations. Test usefulness, clarity, missingness, comparability, collection time and cost; record decisions to retain, revise, merge or remove indicators. Activity counts alone do not demonstrate peacebuilding effectiveness.

Apply gender, age, informality and migration or displacement lenses where evidence and confidentiality permit. Include institutions and practices sustaining peace, not only violence. Migrants and displaced people are rights holders; peaceful strikes, protests and collective bargaining are legitimate activities, not security threats.

Sources and Non Duplication

Use accessible WANEP reports, African Union peace and security material and relevant regional products, including ECOWARN-related outputs and IGAD CEWARN publications. Distinguish public AU reporting from internal Continental Early Warning System information. Coverage, access and publication frequency vary; restricted data or new sharing agreements cannot be assumed.

Use UNHCR, IOM, Afrobarometer and other credible sources where relevant. Labour statistics provide context only where a specific connection to insecurity or peacebuilding is established. The GRI may inform interpretation but its questionnaire, violation inventory and ratings must not be reproduced, rescored or used as proxies for peace.

Prepare a non-duplication matrix showing which evidence is reused, which measures are excluded and what the Barometer adds. Collect primary evidence for identified gaps. ILO Recommendation No. 205 on Employment and Decent Work for Peace and Resilience provides a policy reference, not an additional compliance index.

Questionnaires and Pilot Data Collection

Produce comprehensive, easy-to-complete instruments in English, French and Portuguese: a country or affiliate questionnaire, a short worker questionnaire and a key-informant guide. Use a common core linked to the four domains, optional modules, skip instructions, plain-language definitions, consent text and a stated reference period. Include do not know, not applicable and prefer not to answer options.

Keep the instruments concise and accessible, with low-bandwidth digital and editable offline versions, clear return instructions and a shared codebook. Use qualified translation and independent bilingual review to establish equivalence across the three languages. Test comprehension, ease of completion and practical usability during the pilot.

The consultant proposes an appropriate combination of questionnaires, interviews, consultations and documentary review, with a justified sampling and recruitment approach. Agree the methods, participant coverage and collection arrangements with ALREI at inception, taking account of research objectives, country conditions, safety, available resources and gaps in secondary evidence.

Ensure relevant perspectives across sectors and employment arrangements, including women and young workers and, where safe, informal, migrant and displaced workers. Draw on affiliates and other appropriate networks, document coverage and non-response, and explain the limits of inference. Pilot the collection and coding process and refine the tools before wider use.

Evidence Management and Analysis

Agree the reference period and data cut-off before collection. An annual edition normally covers the previous 12 months; a six-month update covers the subsequent six months. Record actual observation, publication and extraction dates. Older statistics remain visibly dated and cannot demonstrate that conditions have remained unchanged.

Maintain a source register linking findings to country, geography, period, definition, access conditions and use. Distinguish observed events, statistical estimates, institutional assessments, testimony and analytical judgement. Repeated publication of one account is not independent corroboration.

Triangulate accounts where possible, retain contradictory evidence and attribute single-source claims. Distinguish documented links to conflict from respondents' explanations and analytical interpretation; cross-sectional associations do not establish causation. Mark missing data as unavailable, explain gaps and avoid filling them with regional averages. Report sample counts and denominators and withhold unsupported comparisons.

Use transparent evidence-quality notes – well supported, limited or insufficient – based on relevance, recency, coverage and corroboration. These describe evidence strength, not alert levels. An authoritative single source may support a finding where its limitations are clear. Country profiles begin with the peace and security context, followed by domain findings, worker perspectives and policy implications.

Dashboard and Policy Engagement

Develop an easy-to-read continental overview and country views organised by the four domains. List all African countries; populate the pilot countries and mark others not yet assessed. Show dated findings, evidence quality, coverage gaps and priority policy actions. Avoid predictive labels, alert colours, unsupported rankings and a general labour-rights scorecard.

Provide an editable spreadsheet with clear charts and filters, plus a printable version for reports and policy briefs. Include source notes, a plain-language legend and update instructions. Use existing approved tools so ALREI can refresh the dashboard at each publication cycle without bespoke software or continuous feeds.

Consultation and Validation

At validation, review pilot findings, indicator performance, language clarity, collection burden and dashboard usability with union and policy participants. Record decisions, dissent and unresolved issues; revise the products before publication. Validation establishes relevance and usability, not statistical representativeness.

Ethics Inclusion and Quality Assurance

- Obtain voluntary informed consent in an understood language and separate permission for attributed quotations. Allow participants to decline questions or withdraw before the agreed anonymisation cut-off.
- Minimise personal data, separate contacts from research records and agree secure access, transfer, retention and deletion with ALREI. Suppress small cells and details that could identify or expose participants.
- Provide safe, accessible participation, respect diversity and disclose conflicts of interest. Address immediate protection concerns through existing authorised ITUC-Africa procedures, with consent and safety considerations.
- Check values, citations and coding; document limitations and corrections. ALREI coordinates technical and factual review. Stakeholder disagreement does not override substantiated findings; simulated data must never appear as observed results.

Continental Rollout and Sustainability

Prepare a costed roadmap for all-country coverage, including alternative respondent networks where affiliates are absent. Specify collection, verification, analysis and approval responsibilities, staffing, timing and measures to address evidence gaps. Separate one-off design costs from recurring research, focal-point support, translation, accessibility, publication and dissemination costs; do not assume unpaid labour or unconfirmed partner contributions.

The annual baseline uses one collection window, cut-off, consolidated review and release. Cost an optional six-month assessment or shorter update separately, activated only with sufficient funding, staff capacity and new evidence. Retain compatible core tools, document revisions and archive editions. Routine work between releases is limited to file retention and preparation for the next cycle.

Duration Deliverables and Reporting

Complete the assignment within 12 calendar weeks from the agreed start, including ALREI review and publication. The inception workplan specifies consultant days, focal-point inputs and review dates. Submit the following milestones with brief progress updates identifying constraints and decisions needed.

Deliverable	Required content	Due
1 Inception framework	Scope and country selection; draft indicators; all-country source and non-duplication matrices; sampling, ethics, workplan and budget.	Week 2
2 Research toolkit	Three-language questionnaires, guides and consent text; codebook; digital/offline formats; source register, profile templates and dashboard prototype.	Week 3
3 Pilot collection note	Coverage and respondent mix; indicator performance, gaps, workload and costs; cleaned preliminary dataset.	Week 6
4 Draft results and methodology	Pilot country profiles, findings, limitations, indicator-testing results and revised methodology; policy recommendations.	Week 9
5 Validation record	Stakeholder feedback and dashboard usability findings; decisions, dissent, responses and agreed revisions.	Week 10
6 Publication and handover	Published pilot report and methodology; policy brief; final multilingual instruments, dataset and dashboard; circulation and rollout plan, cost options and staff handover.	Week 12

Final Package and Acceptance

The report covers purpose and scope, reference period, methods, peace and security context, country findings, worker perspectives, indicator performance, costs, validation decisions, limitations and implementation recommendations. Annex the final indicator dictionary, tools, coverage and sources. State pilot status clearly and reserve time for publication approval.

Supply narrative outputs in editable Word and PDF; datasets and registers in Excel or an open tabular format; the dashboard in editable and printable formats; and presentations in PowerPoint. Include any analysis code used and operating instructions. Transfer appropriately anonymised material under the agreed access rules.

ALREI accepts outputs against the technical requirements above, completion of the approved pilot, documented revisions following validation and readiness for repeat use. The consultant resolves consolidated comments and hands over a complete, internally consistent package. Material changes to scope or deadlines require written agreement.

Institutional Arrangements

The Executive Director of ALREI or a designated research lead supervises the assignment, approves methodology, facilitates contacts and confirms technical acceptance. ITUC-Africa authorises publication. The consultant manages research quality, secure data handling and delivery; affiliates provide agreed evidence and contextual review. External institutions remain potential sources or technical interlocutors, not committed partners. Representation in ITUC-Africa's name requires authorisation.

Required Qualifications and Experience

- Postgraduate qualification in peace and conflict studies, labour studies, social sciences, economics, statistics, public policy or a related field, with substantial applied research experience.
- Strong understanding of African conflict, peacebuilding and human security, trade union roles and relevant labour dimensions; familiarity with regional evidence sources and the boundaries of the GRI.
- Demonstrated cross-sectional or mixed-methods research, ethical worker interviewing, source verification, spreadsheet analysis and accessible policy writing.
- Experience developing practical research tools and facilitating stakeholder validation within limited budgets.
- Excellent English and demonstrated capacity to deliver professionally translated and reviewed French and Portuguese instruments through team skills or budgeted support.

Contractual and Financial Arrangements

The assignment may be contracted through an amendment to the existing consultancy, subject to ITUC-Africa procedures. Agree the start date, level of effort, fee and pilot coverage; replace incompatible earlier deliverables and avoid charging again for work already paid for. Future editions require separate funded agreements.

Subject to the signed agreement, retain three payments: 30% on acceptance of the inception framework and tested toolkit; 30% on acceptance of the draft pilot report and collection record; and 40% on acceptance of published pilot results, the validated methodology and complete handover. Identify fees, taxes and reimbursable costs separately. Travel requires prior approval.

Application and Submission

Submit a technical proposal covering the methodology, pilot selection, tools, languages, dashboard and validation; a workplan and availability; CVs and relevant work samples; and an itemised financial proposal. Identify translation and review arrangements. An existing consultant submits these as a revised proposal for the extension.

Send submissions to alrei@ituc-africa.org with the subject African Trade Union Peace and Security Barometer Consultancy. ITUC-Africa confirms the submission deadline and contracting route separately. **Submission Deadline – November 5, 2026**

Ownership and Publication

ITUC-Africa owns the commissioned outputs and reusable tools, subject to third-party licences. ALREI determines attribution and dissemination. Obtain permissions, acknowledge sources and protect restricted drafts and identifiable material; confidentiality continues after the contract. Publish through ITUC-Africa channels following approval, with a documented correction route and version history.