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This evaluation has been conducted according to ILO’s evaluation policies and procedures. It has not been professionally edited, but has undergone quality control by the ILO Evaluation Office

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List of acronyms

ADB	Asian Development Bank
AB	Actuarial Bureau
ASEAN	Association of Southeast Asian Nations
BKK	Bangkok
CO	Country office
CTA	Chief Technical Adviser
DWCP	Decent Work Country Programme
DWT	Decent Work Team
GDP	Gross Domestic Product
ILO	International Labor Organization
NPC	National Project Co-ordinator
OCSC	Office of the Civil Service Commission
P&B	Programme and Budget (ILO)
PSC	Project Steering Committee
RTG	Royal Thai Government
SDG	Sustainable Development Goals
SSO	Social Security Office
ToC	Theory of Change
ToR	Terms of Reference
UNICEF	United Nations Children's Fund
WCF	Workers Compensation Fund

Executive Summary

Project Background

This evaluation report covers the ILO project "Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand" (THA/19/01/THA). The project, funded by the Social Security Office (SSO) of Thailand, was launched in 2019 with the goal of enhancing the efficiency, effectiveness, and sustainability of Thailand's social security system.

The project aimed to strengthen the SSO's capacity for policy design, with a specific focus on research and actuarial services. The project aligned with the objectives of the Thai 12th National Economic and Social Development Plan (2017-22), Milestone 9 of the 13th National Economic and Social Development Plan (2023-2027), and the 20-Year National Strategy (2017-2036), as well as national efforts to adapt social protection to meet the challenges of an ageing population and the high proportion of informal workers. The project was built around three main outcomes: (1) the establishment of the Actuarial Bureau (AB), (2) the development of gender-responsive social security policy reforms, and (3) raising public awareness about social security schemes.

Evaluation Purpose and Methodology

The purpose of the evaluation is to ensure project accountability and learn from the experience of the project which is valuable for ILO constituents and key stakeholders. The evaluation does this by assessing the achievement of the project against its plan and identifying challenges and any external factors that may have affected the project and its implementation.

The evaluation adopts the ILO's Evaluation Guidelines as the basic evaluation framework and was conducted in accordance with OECD/DAC criteria—relevance, coherence, effectiveness, efficiency, impact, and sustainability. It also assessed cross-cutting issues such as gender equality and disability inclusion. The evaluation employed a mixed-methods approach, utilizing both quantitative and qualitative data. Data collection included a desk review of project documents, and key informant interviews with stakeholders (SSO, ILO project team, technical specialists, and social partners). A stakeholder workshop was also held to validate findings. The evaluation framework was based on ILO's Results-Based Management system and adhered to the UN Evaluation Group's ethical guidelines, ensuring representation, informed consent, and confidentiality throughout the process.

Evaluation findings

Relevance

The project was highly relevant to Thailand's national goals and aligned with key strategic frameworks, including the Thailand 2030 Agenda for Sustainable Development Goals (SDGs) and the Decent Work Country Programme (DWCP). By focusing on actuarial capacity building and evidence-based policy design, the project directly addressed the SSO's need to enhance its social protection mechanisms in response to an ageing population and economic challenges. The project's objectives were well aligned with the

Thai government's policy priorities, particularly the extension of social protection to vulnerable populations, including informal workers. However, the project was perhaps overambitious and included too many activities. Given the length of the project, it would have been advisable to build in the possibility of revising the activities over time. The project was also based on the assumption that the provision of quality advice would lead to policy change and did not sufficiently take account of the need to factor in the complex political and socio-economic context. We have identified this as a lesson learned for the ILO.

Coherence

The project demonstrated strong coherence with other ILO and UN initiatives in Thailand, including the UN Joint Programme on Social Protection. It also aligned with broader international labour standards, particularly the ILO Social Security (Minimum Standards) Convention, No. 102. The project successfully coordinated with national stakeholders, including Mahidol University, which played a pivotal role in strengthening actuarial education and capacity. However, the limited integration of some communication strategies into the broader SSO organizational framework presented challenges in achieving a fully coherent implementation.

Effectiveness

The project was effective in achieving several of its key objectives, particularly in building the SSO's capacity in actuarial science and policy design. The development of the Actuarial Bureau (AB) and the delivery of actuarial training were notable achievements, equipping SSO staff with essential skills. However, delays in the formal establishment of the AB, due to external approval processes, hindered the project's ability to fully realize this outcome within the project timeline. The project also contributed to policy design efforts through high-quality actuarial reports, although some recommendations were only partially adopted by SSO.

Efficiency

The project efficiently utilized its USD 1,354,000 budget by leveraging the UN Joint Programme on Social Protection for All, providing critical technical support and saving resources. The use of a duty-bearer-funded modality, where the SSO directly financed the ILO's technical assistance, is an innovative practice that allowed for focused and context-specific support. However, resource allocation for interpretation services and coordination support was initially underestimated, which affected intellectual exchange with SSO staff and impacted coordination. COVID-19 reduced the Chief Technical Adviser's (CTA) on-site presence, limiting coaching and opportunities to strengthen intellectual and social capital. Delays in establishing the Actuarial Bureau (AB) highlighted the need to anticipate bureaucratic complexities in future planning.

Impact

The project had a substantial impact on building actuarial and research capacity within the SSO. By equipping staff with new skills and creating the foundation for the AB, the project contributed to long-term improvements in Thailand's social security system. Collaboration with Mahidol University also created a lasting impact by strengthening the pipeline of actuarial professionals in Thailand, which is expected to benefit both the

public and private sectors. However, translating technical outputs into immediate policy reforms remains a challenge, as policy changes are influenced by broader political and economic factors.

Sustainability

The sustainability of the project's outcomes largely depends on the formal establishment of the AB. While the project has laid the groundwork, the approval process has been delayed, posing a risk to the long-term institutionalization of actuarial functions within the SSO. The training provided to SSO staff is expected to have a lasting impact, but ensuring that the AB is formally recognized is critical for sustaining these gains. Additionally, the partnership with Mahidol University offers a sustainable model for capacity building in actuarial science.

Cross-Cutting Issues

The project integrated gender equality and disability inclusion, focusing on extending social protection to vulnerable groups, such as informal workers and domestic workers, with notable efforts to strengthen maternity benefits. However, the absence of a thorough gender analysis limited full mainstreaming of gender concerns. Disability inclusion was addressed through occupational health and safety measures, though a more explicit focus on the needs of persons with disabilities would have improved the project's impact. The project also aligned with international labour standards, supporting Thailand's aspirations for OECD membership, and contributed to several Sustainable Development Goals, including SDG 1.3 on social protection.

Lessons Learned and Good Practices

One of the key lessons learned is the importance of designing projects that take into account the broader political and socio-economic context. The project's assumption that high-quality outputs would naturally lead to policy changes did not fully account for these complexities. The duty-bearer-funded modality, in which the SSO directly financed the ILO's technical assistance, emerged as a good practice. This model allowed for tailored, in-depth support and should be considered for replication not only in new projects within the SSO and other government agencies but also expanded to other countries. However, future projects should ensure a more focused scope and realistic timelines to avoid overextension and prevent fatigue among both ILO and SSO staff.

Recommendations

1. **Establish the Actuarial Bureau:** The SSO should prioritize the formal establishment of the AB to ensure the sustainability of the actuarial capacity built through the project.
2. **Engage Senior-Level Communication between ILO and SSO:** ILO at the senior management level should continue engaging with SSO leadership to ensure that the long-term strategic priorities of both organizations are aligned. This collaboration can help reinforce project achievements and explore new areas of support.
3. **Replicate the Duty-Bearer-Funded Modality:** The ILO should replicate the innovative duty-bearer-funded model to future projects within the SSO and other

government agencies, as well as in other countries. This approach not only allows for tailored technical assistance but also fosters strong stakeholder ownership, engagement, and alignment with institutional and national priorities.

In conclusion, while the project made significant progress in building the SSO's actuarial and research capacities, its long-term success now hinges on three critical steps. First, the formal establishment of the Actuarial Bureau (AB) is essential for institutionalizing these capacities and ensuring sustainability. Second, strengthened senior-level communication between ILO and SSO leadership is necessary to align strategic priorities and reinforce ongoing collaboration. Lastly, the replication of the duty-bearer-funded modality, which enabled local ownership and context-specific support, should be considered not only for future SSO projects but also for other government agencies' initiatives. Additionally, the potential for adopting this approach in other countries could enhance the sustainability and effectiveness of capacity-building efforts across different contexts. These combined actions will ensure that the project's gains are fully realized and contribute to the continued development of social protection systems in Thailand and beyond.

1. Project background

Introduction

This report outlines the findings of the independent final evaluation of the ILO project "Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand" (THA/19/01/THA). The project, funded by the Social Security Office (SSO) of Thailand, aims to enhance the effectiveness, efficiency, and sustainability of Thailand's Social Security System by strengthening the SSO's actuarial and research capacity.

This evaluation, commissioned by the ILO, was conducted by an independent evaluation team consisting of Mel Cousins, team leader, and Thamana Lekprichakul, team member, as outlined in the Terms of Reference (ToR). The evaluation process was overseen by Pamornrat Pringsulaka, the ILO Regional Evaluation Officer, who served as the evaluation manager.

Background and Objectives

Thailand has one of the most comprehensive social protection systems in the Asia-Pacific Region. However, issues like the adequacy of benefits and the future sustainability of the system are significant challenges, particularly in a context of rapid ageing and a high dominance of the informal economy. The current social protection system, including the social insurance scheme run by the Social Security Office (SSO) as a major pillar, needs to adapt to new social and economic challenges, including an ageing society. Coverage needs to be improved to reach those without standard working careers. The need for further reforms towards the development of more comprehensive, inclusive and integrated schemes is recognised in the country as a key priority. The project, which is a result of extensive consultations with the SSO and constituents, aims to provide concrete outcomes to support social protection development and capacity in Thailand. It also builds on a long history of social protection work undertaken by the ILO in the support and promotion of social security in Thailand. The project is funded by the SSO and contributed to the objectives of its Strategic and Operational Plans.

A critical gap in Thailand's social security system is the gender disparity in access to social protection. Women, especially those working in the informal sector, face significant barriers in terms of accessing social insurance benefits, including pensions, healthcare, and maternity protections. The project recognized these gender-based inequities as a key priority for reform and placed significant emphasis on developing gender-responsive policies aimed at bridging this gap. As a result, the project aimed not only to strengthen the technical capacities of the SSO in actuarial science and research but also to incorporate gender perspectives into all aspects of social security reform.

The project's gender-responsive approach aligns with Outcome 2, which focuses on preparing and approving relevant social security reforms that are informed by the gender-specific vulnerabilities faced by women in Thailand's labour market. These reforms are designed to ensure that both women and men benefit equitably from the social security system, with targeted efforts to extend coverage and address gender-related gaps in the provision of benefits.

The development objective of the project is to enhance the effectiveness, efficiency and sustainability of Thailand Social Security System and therefore contribute to enhanced and improved social protection of women and men residing in Thailand.

There are three project outcomes:

Outcome 1 – The SSO Actuarial Bureau is in place and its team has the necessary capacity to provide the organization with actuarial services

Output 1.1: SSO Actuarial Bureau structure developed, approved and ongoing management processes defined

Output 1.2: SSO Actuarial Bureau officials have enhanced capacity through their participation in training activities and continuing professional development

Outcome 2 – Relevant and gender-responsive Social Security Policy reforms are prepared and approved by the Thai Government, informed by evidence produced by the SSO Actuarial Bureau and by the Project services

Output 2.1: Analysis and input into policy and reform options

Output 2.2: Policy, management, and administration recommendations for extending social protection for all women and men, including costing estimations

Output 2.3: SSO Actuarial Review produced and available to inform policy decisions

Output 2.4: Workers' compensation actuarial valuation produced and available to inform policy decisions

Output 2.5: Retirees' contributions for health and other health related issues

Output 2.6: Investment Governance, developing a Funding Policy and reviewing Investment Policy and management

Output 2.7: Research and dialogue on options to expand the scope of hospitals available to SSO members for use

Output 2.8: Training of SSO staff /improving social security knowledge

Outcome 3 – Thai society, including social partners and Thai citizens in general, is increasingly aware of the functioning of social security schemes and to the importance of gender-responsive Social Security.

Output 3.1: Journalists and/or correspondents have increased knowledge in Social Security topics, with the target of parity

Output 3.2: Social Partners have increased knowledge in Social Security topics, with a focus on those represented in SSO Board, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)

Output 3.3: Capacity of all SSO Departments increased to communicate social security gender responsive technical messages

Output 3.4: Annual Public Statistical and Actuarial Updates available and shared with the broad public (one per year), including gender disaggregated data

Output 3.5: Increased knowledge of the planning agency, line ministries and parliamentarians in the area of social insurance, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)

Output 3.6: A public dialogue on Social Security is created at national level involving broad relevant national stakeholders, inclusive of women representative associations

Key collaborators

The main partner of the Project is the Thailand Social Security Office. The Project also includes collaboration with other stakeholders who directly or indirectly involved in the topic of social protection, including other government departments, workers' and employer's organizations, research institutes and other national and international organisations. The project also works with academic partners e.g. Mahidol University (and its actuarial science department) for the delivery of an elective course.

Institutional framework

The ILO is an executing agency responsible for overseeing the technical and administrative aspects of project implementation. This includes supervision of the policy recommendations and other project outputs to ensure their conformity with ILO Conventions and Recommendations. The project is under the overall responsibility of ILO Country Office for Thailand, Cambodia and Lao PDR.

The project management is led by a Chief Technical Adviser supported by a Finance and Administrative Assistant at 50% and since March 2023 by a National Project Coordinator, who is responsible for the day-to-day management of the project. The project receives technical backstopping from the ILO Senior Technical Specialist on Social Protection from the Decent Work Technical Support Team for East and South-East Asia and the Pacific, based in Bangkok, and the Head of the Actuarial Services Unit from the ILO Social Protection Department in Geneva. Additionally, the project closely collaborates with the Senior Programme Officer for Thailand and the Lao People's Democratic Republic of CO-Bangkok and coordinates activities with the Workers' Activities Specialist and Employers' Activities Specialist of the DWT-Bangkok, especially in activities related to the capacity building of social partners.

Project steering committee

The PSC was set up with representatives from the ILO CO-Bangkok and the SSO to oversee the progress of project implementation. The establishment of the PSC is based on the order of the Social Security Office No. 13772/2019, titled "The Appointment of the Steering Committee for Capacity Building for Policy Development with Focuses on Actuarial Science and Research Project." From the SSO side, led by the Secretary General, the PSC includes relevant senior management and members of the SSO Board of Management, which comprises worker and employer representatives. The PSC was planned to meet once or twice a year to oversee, review, and sign off on project activities, deliverables, work plans, and budget planning.

2. Evaluation Background & Methodology

Evaluation Purpose

The purpose of this final evaluation is to provide an independent and objective assessment of the ILO project "**Strengthening Social Security Office capacities in Policy Design with a focus on Research and Actuarial Services, Thailand.**" This evaluation seeks to evaluate the project's performance, assess its long-term sustainability, and provide insights that will guide the development of future social protection initiatives in Thailand and beyond. The evaluation also serves to ensure accountability to the donor (SSO) and other stakeholders, while facilitating learning and identifying key lessons to improve similar projects.

Evaluation Objectives

The primary objectives of the final evaluation are to:

1. **Assess Project Effectiveness and Impact:** Evaluate the extent to which the project has achieved its intended outcomes, particularly in enhancing the SSO's capacities in policy design, research, and actuarial services. This includes assessing the effectiveness of project activities and their impact on social protection policy, financing, communication, investment, management, and actuarial work within the SSO and among its constituents.
2. **Evaluate Sustainability:** Examine the sustainability of the project outcomes and the institutional transformations within the SSO. This involves assessing the continued relevance and effectiveness of the skills and systems developed through the project.
3. **Gender Equality and Empowerment:** Assess how well gender equality and the empowerment of women were integrated into the project design and implementation. Identify any unintended results related to gender equality, whether positive or negative.
4. **Implementation of Midterm Recommendations:** Review the extent to which the recommendations from the midterm evaluation were implemented and their impact on the project's progression and outcomes.
5. **Identify Lessons Learned and Good Practices:** Document key lessons learned and emerging good practices from the project. Provide strategic recommendations that can be applied to similar future projects to enhance their design and implementation.
6. **Accountability and Learning:** Ensure accountability to the stakeholders, including the donor and project beneficiaries, by providing a transparent assessment of project performance. Facilitate learning among stakeholders to improve future social protection initiatives.

Evaluation Scope

The evaluation covers the entire project lifecycle, from its inception in July 2019 to its conclusion in September 2024. It examines all project activities, outputs, and outcomes, with particular attention to cross-cutting issues such as responsiveness to COVID-19, gender equality, disability inclusion, and non-discrimination. The evaluation also assesses the project's impact on enhancing the SSO's capacity in actuarial and policy design functions and its broader influence on Thailand's social protection system.

Evaluation Clients

The primary clients of this evaluation are:

- **Project Management Team:** Responsible for implementing the project.
- **Donor (SSO):** The Social Security Office of Thailand, which funded the project.
- **ILO Regional Actuarial Services:** Providing technical oversight and support.
- **ILO Country Office for Thailand, Cambodia, and Lao PDR:** Overseeing the project at the national and regional levels.

Secondary users include tripartite constituents, academia, and civil society organizations involved in social protection, who will benefit from the insights and recommendations to improve future social protection initiatives.

Evaluation Framework

The evaluation applies the OECD Development Assistance Committee (DAC) criteria—relevance, coherence, efficiency, effectiveness, impact, and sustainability—to assess the project's performance. The conceptual framework follows ILO's Results-Based Management (RBM) system and complies with ILO policy guidelines for results-based evaluation, as well as the Code of Conduct for Evaluation of the UN System. The evaluation also integrates ILO's technical and ethical standards, ensuring a comprehensive and rigorous assessment. By achieving these objectives, the evaluation will provide critical insights and recommendations to support the ongoing development of robust, inclusive social protection systems in Thailand.

Evaluation Criteria and Questions

The evaluation assessed the project based on the OECD/DAC criteria (relevance, coherence, efficiency, effectiveness, impact, and sustainability) and ILO cross-cutting concerns. The evaluation questions (as revised during the inception phase) addressed in this evaluation are:

Assessment Criteria	Questions to be addressed
<p>Relevance <i>(The extent to which the intervention objectives, design and approach continue to respond to beneficiaries, country, and partners/institution/donors' needs, policies, and priorities, and is expected to continue to do so if circumstances change (or have changed)).</i></p>	<ul style="list-style-type: none"> • To what extent has the project design, objectives, and approach supported the goals outlined in the Thailand 2030 Agenda for SDGs, Thailand Decent Work Country Programme, Thailand national development plan, and the ILO Programme and budget (20-21 and 2022-23)? • To what extent has the project responded to the needs of Thailand tripartite constituents and key partners (SSO)? • To what extent the project has responded and adapted appropriately and according to the priorities and needs of the Thai government workers and employers' organization and key stakeholders within the shifting and dynamic context at country levels, including COVID-19 pandemic? • To what extent is the project identifying, reaching and responding to the priorities and needs of the most excluded groups e.g. those in the informal economy?
<p>Coherence <i>The compatibility of the intervention with other interventions in a country, sector or institution)</i></p>	<ul style="list-style-type: none"> • To what extent has the project adhered to decent work principles including international labour standards, human rights-based approach and gender equality and non-discrimination? • Within the parameters of the Thailand DWCP, assess the extent of compatibility of interlinkages between the project and other ILO or other UN projects in Thailand and other interventions carried out by SSO and Government and social partners.
<p>Effectiveness <i>(The extent to which the interventions achieved, or are expected to achieve, its objectives and its results, including any differential results across groups)</i></p>	<ul style="list-style-type: none"> • To what extent has the project achieved its planned objectives? Have all the outputs been delivered with quality and quantity as planned? If not, why? • What are the risk factors, challenges, and opportunities encountered that contributed to or adversely affected the achievement of the objectives and outcomes?

Assessment Criteria	Questions to be addressed
<p>Efficiency <i>(The extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way)</i></p>	<ul style="list-style-type: none"> • How efficiently are the project resources/inputs (e.g. financial, human, institutional, technical, etc.) converted to results? • Are the project management capacities and structure (including the operational/implementation arrangements) facilitating good results and efficient delivery? • Is there a clear understanding of roles and responsibilities by all parties involved? How effective is communication between the project team, ILO Country Office, SSO, and other key partners? • How effectively does the project management team employ a results-based monitoring approach?
<p>Impact <i>(The extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.)</i></p>	<ul style="list-style-type: none"> • To what extent have the projects' interventions contributed to transformative change due to national stakeholders' enhanced capacity on social security research and actuarial service? • How has the Project contributed to the social protection reform process (including policy changes to relevant laws)? • Were there any unintended effects that may have been caused by the Project?
<p>Sustainability <i>(The extent to which the net benefits of the intervention continue, or are likely to continue)</i></p>	<ul style="list-style-type: none"> • To what extent are the results of the project likely to have a long-term, sustainable positive contribution to the project objective and relevant targets? • What are areas where further reinforcement of the project achievements would be needed? • What are the main risks for the sustainability of the project and what are the immediate actions/interventions to ensure that the achievements of the project can be met and sustained?
<p>Crosscutting</p>	<ul style="list-style-type: none"> • To what extent are gender and disability inclusion, and non-discrimination being mainstreamed as a cross-cutting concern throughout project design, implementation, and deliverable? • To what extent did the project enhance social dialogue and tripartism and promote ILO Labour standards? • To what extent has social dialogue contributed to achieving the planned objectives? Any lessons learned?

As the project has not developed an explicit theory of change, the evaluation team worked with the project team to clarify the implicit ToC (see chapter 4).

Methodology

The evaluation adopts the ILO's Evaluation Guidelines as the basic evaluation framework.¹ It was carried out in accordance with ILO standard policies and procedures, and complied with evaluation norms and followed ethical safeguards.

The evaluation adopts the ILO's Evaluation Guidelines as the basic evaluation framework. It was carried out in accordance with ILO standard policies and procedures, and complies with evaluation norms and follows ethical safeguards.

The evaluation applied a **mixed methods approach**, collecting and analysing both quantitative and qualitative data, and was participatory in nature, based on the principles of representation (i.e. all stakeholders should have the opportunity to voice their opinions). This allowed for triangulation of information to increase the validity and rigor of the evaluation findings and analysis, and the ability to capture the achievement of expected and unexpected outcomes.

Methods included:

- **Desk review** of project documents, reports, studies (see Appendix 6), and data sources
- Examination of the project's Logical Framework (LogFrame) and reconstruction of the **Theory of Change** (ToC) based on the LogFrame, since the ToC was absent, to assess the underlying assumptions and causal pathways.
- **Key informant interviews** were conducted with a total of 24 participants, comprising tripartite constituents, the ILO project team, technical specialists, SSO representatives, social partners, and external collaborators (see Appendix 5). Of these, 42% were male and 58% were female. Interviewees were selected based on their relevance to project activities, expertise in social protection and policy development, balanced representation of different groups, availability, diversity, and their specific roles in the project. Of the 24 participants, 13 were representatives from the SSO, reflecting their central role as the primary implementing agency and the main beneficiary of capacity-building efforts.
- **Survey of project-supported trainees:** An online survey was sent to Thai participants who received training in various project areas. Despite efforts to gather feedback, the response rate was too low for meaningful analysis, and the results were excluded from the final evaluation.
- **Stakeholder workshop** for critical reflection, validation of findings, and dissemination of the final report

The evaluation mainstreamed gender equality as a cross-cutting concern and followed the ILO's Guidance Note 3.1 on integrating gender equality in monitoring and evaluation.

¹ See <https://www.ilo.org/eval/Evaluationguidance/lang--en/index.htm>

The evaluation incorporated a dedicated evaluation question addressing how Gender Equality and Women’s Empowerment (GEWE) was integrated into the project. Under Outcome 2, gender-responsive social security policy reforms were a key focus, aimed at reducing gender disparities in coverage and ensuring that both men and women benefit equitably from social security schemes.

The gender balance of participants in key informant interviews (48% male, 52% female) ensured inclusive and representative perspectives. However, the gender disparity at the senior management level was addressed through purposive interviews with female senior management, ensuring that their voices were heard and that a gender-representative view on the issues was captured.

The evaluation team adhered to the UNEG Ethical Guidelines for Evaluation and the ILO's Code of Conduct for Evaluation in the UN system, ensuring ethical considerations such as confidentiality, informed consent, and protection of vulnerable groups. The Evaluation Manager and EVAL HQ will ensure the quality of the evaluation report meets the quality standard. The evaluation report is considered final only upon the approval of ILO Evaluation Office.

Evaluation limitations and biases

This is a standard end-of-project independent evaluation. As such, the evaluation team was not previously involved in the project and had no control over the availability of data. Given these constraints, the evaluation relies on interviews and existing available data (data collected by the project or available from the key stakeholders).

In addition to these data sources, an online survey was conducted to assess the effectiveness and impact of training programs in enhancing participants' capacity in actuarial science and policy design, as well as in deepening their understanding of the social protection system. However, the response rate to this survey was too low to allow for meaningful inferences, limiting the robustness of this particular aspect of the evaluation.

In terms of the impact assessment, it is difficult, in many cases, to measure the impact which ILO work (and indeed much development work) has at a macro level. While it is easy to measure the *outputs* of ILO work (in terms of reports, training, actuarial studies, etc.) it is much more difficult to measure long-term *outcomes* such as improvements in living standards.

The small scale and short duration of ILO projects, combined with limited data availability, mean that it is often difficult to directly attribute improved living standards to ILO interventions. Additionally, issues of causation, time lag, and data limitations further complicate efforts to demonstrate a clear link between ILO support and broader development impacts. Although direct measurement of impact is challenging, the evaluation can assess the “orientation towards impact” of the project. In this regard, the evaluation explores how well the project was designed and implemented with the aim of contributing to long-term development objectives. This includes examining whether the project’s activities and outputs were aligned with the overarching goals of improving social protection and building capacity in actuarial science and policy design.

In general, it is also difficult to measure efficiency in a concrete manner as ILO does not have any specific measure of efficiency and, even if it did, there is often a lack of

comprehensive data in relation to inputs and outputs. The main available data is the overall budget and we do not have comprehensive data as to human resource inputs. However, this is a general constraint and an assessment has been made on the basis of the available data.

3. Project implementation

This section provides an overview of the implementation of the project at country focusing on key actions. A detailed assessment of the current state of implementation, based on the M&E framework, is set out in Appendix 1. An assessment of the project activities under the evaluation criteria is contained in Chapter 4.

Outcome 1

Considerable work has been carried out in relation to supporting the establishment of an SSO Actuarial Bureau (AB) in developing the necessary actuarial capacity of SSO staff. This includes commissioning a report on structures and job descriptions for a new AB division within SSO. This activity also included specific training for SSO staff (see below) and the Training and Development Day for SSO Staff across different departments.

Outcome 2

The project has also implemented a wide range of activities under outcome 2 to support the development of evidence-based social security policy reforms to be approved by the Thai Government. These have included the following outputs:

- Actuarial Valuation Report of the Social Security Fund.
- Actuarial Valuation Report of the Workers' Compensation Fund (WCF)
- Review of policies to extend social security coverage to workers not covered by SSO schemes. This included sector-specific reports focusing on four sectors: domestic workers; construction workers; SMEs with a focus on the Food and Beverage industry and transport workers. This has included a number of workshops to discuss the issue including all stakeholders, technical and policy briefs featuring international experience and will lead to four sector-specific reports on coverage extension.²
- Technical support on SSO investment management including framework for the development of appropriate strategic asset allocation recommendations, the delivery of a model, workshops and report.
- Delivery of actuarial courses at Mahidol University
- Policy and technical briefs on different issues

SSO staff have been involved in the preparation of the actuarial reports (including training on the model delivered by the ILO) and this has developed staff capacity to carry out such work in the future.

² At the time of writing, these reports are in draft and it is intended to finalise them in September 2024.

The project also provided advice on a number of policy issues which emerged during the project including on providing loans to SSO members; COVID-19 job retention plan; and a proposed reduction in social security contributions.

The project has also supported a review of the Thai social security system in line with the standards set out in the ILO Social Security (Minimum Standards) Convention, 1952 (102) (at the request of the SSO).

The project's work also contributed to a *Review of the pension system in Thailand* which was also supported by other UN agencies.³ This included holding two pension reform workshops in 2021 and 2023.

Planned outputs 2.5 and 2.7 (which related to health insurance) did not turn out to be a priority for SSO and limited work was carried out under these outputs.

A total of 98 participants attended the training sessions, with 53 distinct individuals, as some attended multiple sessions. This included training on investment and governance (53 people); training and development (35 people); and actuarial model (10 people). Of these 80% were women.

Outcome 3

Finally, the project has also carried out a number of activities in relation to outcome 3, i.e. to ensure that Thai society, including social partners and Thai citizens in general, is increasingly aware of the functioning of social security schemes and to the importance of gender-responsive Social Security. These included two Employers' and Workers' Social Security Days and an advocacy event entitled "*SSO Sustainable Social Security for All*" in which policy makers, academia and other relevant stakeholders attended. Additionally, a report on media strategy and approaches was developed, offering recommendations on ways to improve communication with the public and stakeholders. However, there is a lack of available information on how these recommendations were implemented and whether they led to tangible improvements in communication outcomes.

Given the limited data, it is challenging to fully assess the effectiveness of these activities in significantly raising public awareness. While the initiatives like Social Security Days likely contributed to short-term awareness, without a sustained and systematic approach, the long-term impact remains uncertain. The absence of detailed follow-up or impact assessment data makes it difficult to draw conclusions about the overall success of these efforts. Furthermore, the project's focus on gender-responsive social security, though commendable, would benefit from clearer indicators and metrics to evaluate its specific outcomes in promoting gender equity within the social security framework.

Project management

The project has been managed by the Chief Technical Adviser (CTA) who is also the actuarial expert. Initially the project did not have a national project co-ordinator and, the NPC of the UNJP on Social Protection also acted as part-time project co-ordinator on the SSO project. Following the mid-term evaluation, a specific NPC was recruited but this took some time (March 2023). The COVID-19 pandemic occurred during the project lifetime which

³ This report has, for example, been cited by the World Bank in its report on pensions in Thailand (World Bank, 2021).

impacted on the ability of the CTA to be in the SSO offices during that time.

The Project Steering Committee met one or two times per year and approved the project budget and work plans. A Working Team was also established in 2020 which has met on 7 occasions in addition to project management and other meetings.

Following the SSO approval of the first no-additional cost extension, the project was originally planned to end in December 2023 but has been extended on another no-additional cost basis to September 2024.

4. Main evaluation findings

This section of the report sets out the main findings in relation to the evaluation questions set out in section 2 under the headings of relevance, coherence, efficiency, effectiveness, impact and sustainability in addition to cross-cutting issues (as specified in the ToRs).

Relevance

In general, the project's objectives, design and approach respond to the SSO's needs and RTG policies. In particular, the project design and objectives are in line with the goals outlined in the Thailand 2030 Agenda for SDGs, Thailand Decent Work Country Programme, Thailand national development plan, and the ILO Programme and budget.

The project was originally designed under the ILO P&B 2018-19 and was fully in line with Outcome 3: Creating and extending social protection floors. It is also consistent with outcome 7: Universal social protection in the current P&B (2024-25). It was also in line with the Country Program Outcome THA251: Improving the existing social security systems - bridging gaps of inequity and expanding coverage of social protection/ social security to the informal sector. The project also is consistent with Outcome 1.3: Enhanced effectiveness, efficiency and sustainability of the social security system of the DCWP (2019-21) and outcome 2.1 (Strengthened social protection systems to provide inclusive and adequate benefits) of the current Decent Work Country Programme (DWCP) 2023-27.

The project was aligned with the objectives of the Thai 12th National Economic and Social Development Plan (2017-22), Milestone 9 of the 13th NESDP (2023-27), and the Twenty-Year National Strategy (2017-2036), particularly its Reduced Inequality Strategy. It also supported the SSO Strategic Operational Plan, specifically strategies 1-3 for 2020-2022 and strategy 3 for 2023-2027. In addition to these national strategies, the project also contributed to SDG Target 1.3: "Implement nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of the poor and the vulnerable" through its work on coverage extension.

In relation to SSO involvement, the detailed project activities were agreed with SSO initially. However, it is less clear that SSO (which funded the project) fully bought-in to the project and felt ownership of the activities over the lifetime of the project. Although some activities emerged not to be a priority for SSO, the PRODOC did not provide for any review of activities and activities were (in effect) dropped or added (e.g. review of the social security system in line with C102) without any formal change to the main project documentation although they were reflected in the work plans approved at the PSC and Working Team meetings. In addition, it is not always clear where specific activities fall in the implementation plan (i.e. under which heading).

In terms of the project responding to the needs of Thailand's tripartite constituents, the project has included some activities involving employers and employees' associations but respondents felt that they could have been more actively involved. The project did respond to policy issues within the shifting and dynamic context at country levels, including COVID-19 pandemic by providing appropriate advice. However, as noted elsewhere, COVID-19 appears to have exacerbated the communication problems which the project encountered. The project did to a certain extent identify and respond to the priorities and needs of the most excluded groups e.g. those in the informal economy through the work on coverage extension.

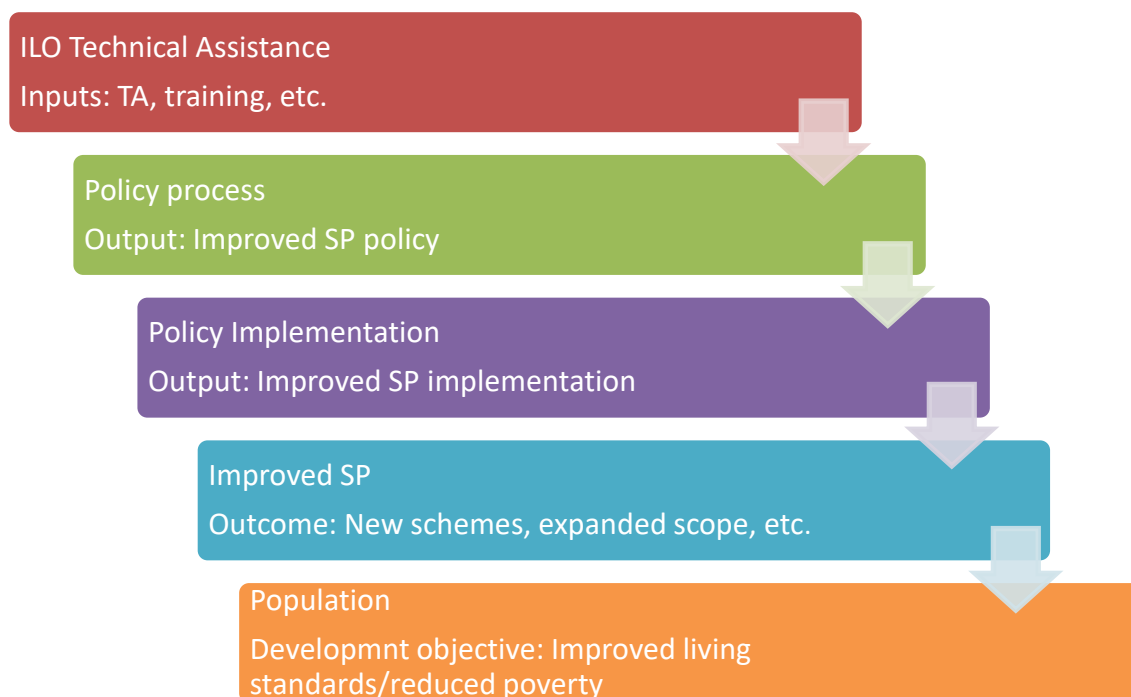
The project adopted an innovative approach for the ILO, utilizing a duty-bearer-funded model, where the duty bearer—the Social Security Office (SSO), the direct recipient of the project's support—funded the project, rather than relying on a third party such as an external donor or funder. This approach is identified as an emerging good practice, as it demonstrates the duty bearer's commitment to the project and fosters greater ownership of the outcomes. In general, the project design was appropriate; however, with the benefit of hindsight, it may have been somewhat overambitious, incorporating too many activities. For example, Output 3 included a broad range of activities requiring different skill sets compared to Outputs 1 and 2. Given the project's duration, it would have been advisable to build in flexibility to revise activities as needed over time.

The project was also based on the assumption that the provision of quality advice would lead to policy change and did not sufficiently take account of the need to factor in the complex political and socio-economic context. We have identified this as a lesson learned for the ILO.

Critically, the project design did not address the need to ensure appropriate communication and did not include an NPC or adequate interpretation from the start. Finally, in implementation neither ILO management nor SSO adequately responded to or escalated challenges when they became clear so that the weaknesses in project design were never adequately addressed.

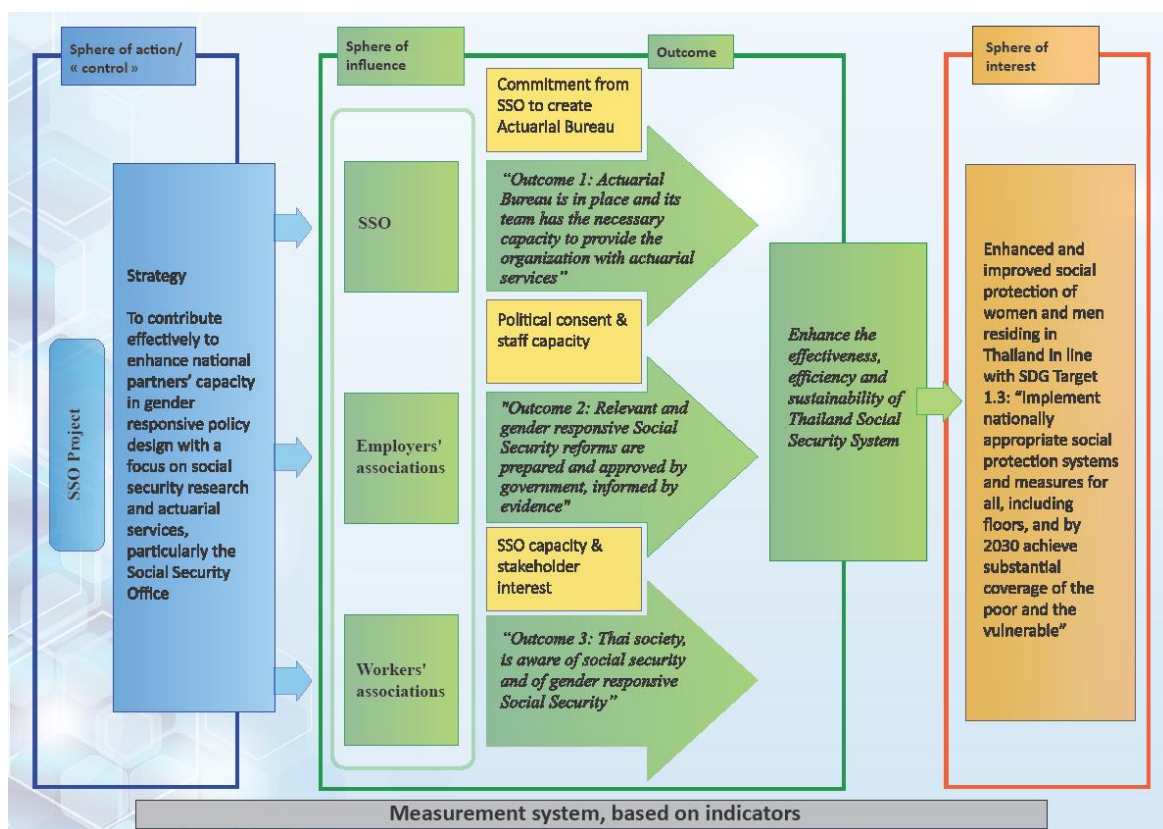
Coherence

In terms of the overall project design (outcomes, outputs and activities), the intervention logic for the project approach is set out below. This is based on the assumption that the provision of technical assistance by ILO (advice, capacity building, etc.) will lead to improved social protection policies (new strategies, laws, etc.) and to improved implementation of social protection policies leading to improved social protection (e.g. broader scope of social protection, higher level of coverage, higher benefits) which will, in turn, lead to better living standards/reduced poverty.



Clearly, it would be preferable to evaluate projects on the basis of *outcomes* (or at least outputs). As discussed in chapter 2, given the small scale and short duration of ILO projects (and limited data availability) it is rarely possible to prove the long-term outcome (improved living standards). It may often be difficult (due to issues of causation, time lag and data limitations) to show that ILO support has led directly to improved social protection.

The project did not have a specific Theory of Change so, in the course of the evaluation, a ToC was developed (below) drawing on the PRODOC. The model is based on that used in the ILO-EU *Improving Synergies Between Social Protection and Public Finance Management* Project.



This appears logical and coherent and the project implementation proceeded in line with the ToC.

The project was also coherent with other work been carried out by the UN and the ILO country office including work on the review of pensions and a Social Protection Diagnostic Review. The project co-operated with the activities being carried out by the UNJP on social protection (which included the International Organization for Migration (IOM), UNICEF and UN Women). The project also drew on and contributed to the expertise of social protection specialists in ILO BKK.

An indirect objective of the project for ILO was to explore the possibility of developing a Regional Actuarial Services Unit, that would be the ground for the provision of these services to other countries in the region, through the use of a South-South Cooperation approach. Indeed, the part-funding of the actuary (CTA) post by this project allowed ILO to provide actuarial services to other countries in the region through the establishment of a Regional Actuarial Services Unit.⁴ The project was arguably less effective in linking with other interventions carried out by SSO and Government and social partners.

Project effectiveness

The evaluation of the project's effectiveness confirms that the key findings from the midterm evaluation remain largely valid. The project, which aims to achieve three main outcomes— (1) establishing the Actuarial Bureau and strengthening actuarial capacity, (2) enhancing capacity in policy design, and (3) raising awareness among key stakeholders— has shown some progress, though significant challenges persist.

⁴ <https://www.ilo.org/projects-and-partnerships/projects/regional-actuarial-services-unit-rasu-bangkok-ilo-actuarial-support>

1. Progress Towards Intended Outcomes

The SSO project has made meaningful strides toward achieving its intended outcomes, (see Appendix 1) though some critical challenges have delayed the full realization of its objectives. The project focused on three main outcomes:

- **Outcome 1: Establishing the Actuarial Science Bureau and Strengthening Actuarial Science Capacity** The project has successfully provided extensive support for the establishment of the Actuarial Bureau (AB), including developing its structure, defining staffing requirements, and proposing salary packages with incentives. Despite these comprehensive efforts, formal approval from SSO senior management has not yet been secured (output indicator 1.1). The proposal to establish the AB was submitted to the Office of the Civil Service Commission (OCSC) and the Comptroller General's Department for consideration.

The OCSC has recommended making certain adjustments to the proposed structure of the AB. In response, the Public Sector Development Group of SSO has been tasked with establishing a working team to review these recommendations and implement the necessary adjustments. This Working Team dedicated to advancing the setup of the AB met on 23rd August 2024 with the participation of the consultancy commissioned by the ILO. This review and adjustment process is expected to take an additional 1-2 years to complete. The outcome of this process will be critical in determining the final structure and operational capacity of the AB, and may have implications for the long-term sustainability and effectiveness of actuarial science within the SSO.

This extended timeline, which stretches beyond the project's life cycle, represents a significant delay and poses a serious risk to the long-term sustainability of the project's objectives. The drawn-out approval process not only hampers the formal establishment of the AB but also creates uncertainty for the actuarial and data scientists currently involved. Without the official establishment of the AB, these professionals face limited opportunities for career growth and advancement within SSO. This lack of a clear and formalized career path may lead to increased turnover, as these skilled individuals could seek opportunities elsewhere that offer more immediate and tangible prospects. The potential loss of key personnel would severely undermine the project's efforts to build and sustain robust actuarial capabilities within SSO, further endangering the sustainability of the project's outcomes. Therefore, it is critical to expedite the approval and establishment of the AB to ensure the retention of talent and the achievement of the project's long-term goals.

- **Outcome 2: Enhancing Capacity in Policy Design** The project's actuarial valuation outputs have significantly contributed to SSO's policy design efforts and have been frequently utilized to inform policy decisions. The quality of the investment strategy review has also been recognized as high; however, the recommendations have only been partially accepted by SSO. This partial acceptance underscores the need to better align the project's recommendations with SSO's operational priorities and risk preferences. Specifically, the SSO board's risk approach—whether more conservative or open to higher risks—must be carefully considered when making investment recommendations. Ensuring that the project's

recommendations are both technically sound and practically applicable within the context of SSO and the country is crucial for achieving a greater impact on policy design.

- **Outcome 3: Raising Awareness Among Key Stakeholders** The scope of work under Outcome 3 has been scaled down compared to initial plans. The project's efforts in reviewing and advising on communication strategies are valid and align with its objectives. However, the adoption of these strategies has been limited because the work is managed by a department outside the mandate of the Research and Development Division. This separation may limit the effectiveness and integration of the project's outputs within the broader organizational strategy. Additionally, the limited engagement with social partners during the project design phase, combined with the constraints imposed by COVID-19, has hindered more substantive forms of social dialogue. For greater impact, it will be necessary to ensure that communication strategies are not only well-designed but also integrated into the appropriate departments to maximize their utility.

2. Effectiveness of Project Strategies in Achieving and Sustaining Outcomes

The project strategies have contributed to the achievement of certain outcomes, particularly in producing high-quality technical outputs. However, there is a noticeable gap in the strategies related to translating these outputs into sustainable policy changes. The project has operated under the assumption that high-quality outputs would naturally lead to policy adoption, but this has not fully materialized due to the complex socio-economic and political⁵ factors at play. While the project identified assumptions and risks, some mitigation measures, particularly regarding delays in establishing the Actuarial Bureau, were vague. This lack of specificity limited the project's ability to adapt effectively to delays and changing circumstances.

A more proactive approach could have strengthened the project's adaptability. For example, introducing a structured reporting protocol with direct reporting to the SSO Board would have added a level of accountability and ensured timely interventions. Regular progress reports from the implementation team, tied to milestone-based reviews, could have provided clearer insights into delays or risks, allowing the board to take corrective actions and hold the implementation team accountable. This additional oversight would help ensure that the project remains aligned with its long-term objectives while addressing emerging risks effectively.

Additionally, pairing technical outputs with clear adoption strategies tailored to the country's context and implementing them in phased stages using a milestone-based approach would help ensure that outputs are not only technically sound but also practically feasible and aligned with the local policy environment, thereby increasing the likelihood of successful and sustainable adoption.

3. Quality of Outputs Delivered

The project has generally delivered high-quality outputs, as evidenced by positive feedback from SSO and other stakeholders such as Puey Ungphakorn Institute for

⁵ For example, changes in national policies, shifts in ministerial focus, alterations in the SSO board structure, evolving stakeholder dynamics, leadership transitions, and resulting shifts in SSO's strategic direction and priorities, among other considerations.

Economic Research, and National Economic-Social Development Council (NESDC). Notable examples include the actuarial valuations, the Workers Compensation Fund (WCF) actuarial valuation, and work related to pensions and coverage extension. However, there were some concerns regarding the Investment Strategy, where SSO staff felt that the proposed investment allocation was not fully appropriate for their needs. This suggests that while the technical quality of outputs is high, there is room for improvement in aligning these outputs more closely with SSO's operational context and expectations.

4. Stakeholder Satisfaction with Project Services and Outputs

Overall, constituents and key stakeholders have expressed satisfaction with the project's services and outputs. SSO staff, in particular, have appreciated the project's responsiveness to their specific requests for support. However, some social partners have expressed a desire for greater involvement in the project, particularly in more direct and substantive forms of social dialogue, rather than merely participating in workshops. This limited engagement with social partners can be attributed not only to the constraints imposed by COVID-19, which affected the level of interaction originally planned, but also to their lack of involvement during the project design phase. Including social partners more actively from the outset could have fostered a deeper sense of ownership and collaboration throughout the project.

5. Identification and Engagement of the Right Stakeholders

The project has generally engaged with the appropriate stakeholders to achieve its objectives. Key stakeholders include SSO, the UN Joint Programme (UNJP) on Social Protection, Mahidol University, Puey Ungphakorn Institute for Economic Research (PIER) of the Bank of Thailand (BOT), the National Economic and Social Development Council (NESDC), and the World Bank. However, there is a need for more in-depth engagement at a senior level between SSO, other RTG stakeholders, and the ILO to ensure that project activities translate into concrete policy outcomes.

6. Key Challenges Detracting from Project Effectiveness

Several challenges have detracted from the overall effectiveness of the project:

- **Delay in Establishing the Actuarial Bureau:** The inability to formally establish the AB has delayed the project's progress toward its first outcome and poses a risk to the sustainability of its objectives.
- **COVID-19 Impact:** The pandemic has significantly hindered face-to-face interactions with social partners, which were critical for advancing Outcome 3.
- **Strategic Alignment:** The project's strategies have not fully addressed the political and economic complexities involved in translating technical outputs into sustainable policies, limiting the effectiveness of its contributions.
- **Stakeholder Engagement:** While the project has engaged with relevant stakeholders, the need for more senior-level engagement and deeper involvement of social partners remains a challenge.

While SSO's current hiring system using SSO operating budget addresses the short-term need to retain actuaries by offering competitive pay, it lacks the long-term benefits that a dedicated AB would provide. Regular employees hired through SSO funds are more likely

to have higher turnover rates, as they lack the job security, career development, and public service commitment that come with government officer positions. This can lead to a loss of institutional knowledge and difficulty maintaining continuity. In contrast, establishing an AB ensures greater institutional stability, fosters long-term expertise, and aligns more closely with public sector accountability and goals. Government officer positions within the bureau would attract professionals seeking meaningful public service careers, contributing to lower turnover and deeper institutional knowledge. Additionally, the bureau would provide a structured, strategic approach to developing in-house actuarial capacity, making it a more sustainable solution for the long-term needs of the SSO.

Efficiency of resource use

The total budget of the project was USD 1,354,000. The budget breakdown by objective, as of August 2024, is as follows:⁶

Item (US\$)	Budget (as per PRODOC)	Total expenditure	Encumbrance	Balance
Objective 1	267,800	227,673.64	1,459.00	12,126.46
Objective 2	215,800	193,578.39	12,487.69	12,391.98
Objective 3	113,600	39,386.92	0	11,815.88
Project management	626,035	650,877.09	69,580.50	33,912.25
Programme support	85,629	77,806.04	0	10,764.16
Provision for cost increase (5%)	45,136			
Total	1,354,000	1,189,322.08	83,527.19	81,010.73

The efficiency of the ILO project in strengthening SSO's capacity in actuarial science and policy design can be evaluated through the allocation of resources, the effectiveness of staffing structures, and the timely completion of project activities. While the project has made commendable progress, certain areas require further optimization to enhance overall efficiency.

1. Allocation of Resources

The allocation of financial, human, institutional, and technical resources has been largely appropriate for achieving the project's outputs. The financial assessment of the ILO project indicates efficient use of funds across most objectives. Objective 1 utilized 85% of its budget, and Objective 2 used 90%, both showing sound financial management with minor remaining balances. Objective 3, however, spent only 34.7% of its budget due to a reprioritization of activities, leading to scaled-back efforts. This underutilization suggests

⁶ The following expenses are not included in the table as they had not been finalized:
 Funding 2 SSO staff for a course: Academy on Social Security at the ITCILO
 Hiring excols to format and edit the Extension of Coverage Report
 Hiring a video producer to help produce the Project outcomes video's
 Hiring an event organiser to support the organisation of the Project closing event.

that any remaining funds should be strategically reallocated to closeout activities or reserved for similar future initiatives. Additionally, lessons learned from Objective 3 can inform the planning of future projects, ensuring more flexible and realistic budgetary forecasting in the face of changing priorities.

The project effectively leveraged resources from the UN Joint Programme on Social Protection for All, leading to significant savings, particularly in human resources. This strategic collaboration provided valuable coordination support and technical expertise, enhancing the project's capacity without additional financial strain.

However, some challenges were encountered in resource allocation, particularly in translation and interpretation services, which are essential for effective communication within the Thai-speaking working environment. Initially, there was no budget allocation for these services, necessitating the reallocation of resources to address this gap. Furthermore, the project highlighted the importance of having a local coordinator and translators with a sufficient understanding of the social protection system, a need that was not fully anticipated in the original project design.

2. Project Staffing Structures and Resourcing of Activities

The overall resourcing of activities has positively contributed to the project's performance and impact. Nonetheless, the initial staffing structure had some limitations, particularly with the absence of a dedicated national project coordinator (NPC) focused solely on this project. The NPC of the UN Joint Programme also took on the coordination of this project, dividing their time between the two initiatives. While this arrangement offered some efficiencies, it may have diluted the focus and engagement necessary for maximizing the project's impact.

Moreover, the staffing structure (administration vs expertise) has presented certain challenges. Due to the impact of COVID-19 and other contextual factors, including the complex dynamics of the project environment, there has been a reduced physical presence of the CTA at SSO. This has inadvertently limited opportunities for on-site coaching and active engagement to strengthen both party's intellectual and social capitals, which are critical components of the project's success. Given these circumstances, there may be merit in exploring alternative structures that are more adaptable to the evolving needs of the project and better aligned with the outcomes achieved. Such an approach could ensure that resources are utilized effectively and fairly and enhance the overall efficiency of the project.

3. Timeliness and Sequencing of Project Activities

Project activities have generally progressed according to the timeline and sequencing anticipated in the project document, with necessary adjustments made to account for the impact of COVID-19. However, the process of establishing the Actuarial Bureau (AB) has experienced delays. The advancement of this process could have been timelier, as the delays encountered have impacted the overall efficiency of the project.

Recognizing that the establishment of the AB involves external government agencies with their own approval processes, the project could have benefited from a more strategic anticipation of these complexities. While the ILO proactively initiated efforts for approval as early as 2020, as demonstrated through key documents such as the Terms of Reference, Business Case, and international experience studies, the formal submission

process ultimately rested with the SSO. This offers a valuable lesson for future project design—ensuring that both the complexity of bureaucratic processes and the procedural responsibilities of implementing partners are fully considered from the outset.

4. Scope and Focus of the Project

The broad scope of the project, which encompasses awareness-raising activities alongside the establishment of the AB and policy design efforts, has posed challenges in terms of resource allocation and focus. Attempting to achieve multiple objectives simultaneously, particularly in areas that may not align perfectly with the ILO's core expertise, has somewhat diluted the project's effectiveness and efficiency. A more focused approach, could have allowed for more targeted resource allocation and clearer emphasis on specific outcomes. This would likely have enhanced both the effectiveness and efficiency of the project.

5. Alignment of Resource Allocation and Stakeholder Expectations

The financial management of the project followed the provisions outlined in the project document. However, there were differences in expectations regarding the allocation of time and presence of key personnel. While the project team believed that the compensation reflected the agreed terms, some stakeholders raised concerns about the balance between remote and in-person engagement. To mitigate potential misunderstandings in future projects, it may be beneficial to clarify expectations around time commitments and presence early in the project agreement, ensuring alignment between all parties.

In summary, while the ILO project has made significant strides in strengthening SSO's capacity in actuarial science and policy design, there are opportunities to further optimize efficiency. Addressing challenges related to resource allocation, refining staffing structures, and potentially narrowing the project's scope will be crucial for maximizing the use of resources and achieving the intended outcomes. Additionally, advancing critical processes like the AB establishment more rapidly, with a clear understanding of external dependencies, will further enhance the efficiency and success of the project.

Impact

The ILO project has had a substantial impact on enhancing the capacity of the Social Security Office (SSO) in actuarial science and policy design. While the project's direct influence on immediate policy reforms has been moderated by various factors, its contributions to capacity building, research development, and institutional strengthening are likely to yield long-term benefits that extend beyond the project's duration. Indeed, this work was recognised when ILO was presented with an 'Outstanding contributor' award by the SSO in recognition of the work done to strengthen and promote social security in Thailand.⁷

1. Strengthening Actuarial Capacity

One of the most significant impacts of the project has been the enhancement of SSO's actuarial capacity. The project successfully developed the foundational structures for the Actuarial Bureau (AB) and provided extensive training to SSO staff. This has equipped them with the necessary skills to manage and evaluate social security funds more

⁷ <https://www.ilo.org/resource/news/ilo-wins-thailand-social-security-office-award>

effectively. The strengthened capacity within SSO is expected to have a lasting impact, enabling the organization to carry out actuarial functions with greater independence and proficiency, contributing to the overall stability and sustainability of Thailand's social security system.

2. Building Research Capacity for Policy Development

The project has also made important strides in strengthening SSO's capacity to conduct research that informs policy. Historically, the Research and Development Office within SSO primarily responded to policy requests in a reactive manner. However, with the support of the ILO project, there has been a noticeable shift towards a more proactive approach, where the office is now generating research and findings that actively guide policy decisions. While this transformation cannot be fully attributed to the project, the exposure to international best practices and participation in ILO training courses have clearly played a role in fostering this change. The development of a more research-oriented culture within SSO is likely to continue influencing policy-making processes in the future.

3. Collaboration with Mahidol University

The project's collaboration with Mahidol University has had a significant and lasting impact. Through this partnership, the project provided lectures and accepted interns from the university, which not only enhanced the skills of SSO staff but also contributed to the education and development of future actuaries⁸. This collaboration is expected to create long-term benefits by increasing the supply of qualified actuarial professionals for both the private and public sectors in Thailand, helping to ensure the continued development of actuarial expertise within the country.

To build on these successes, it is recommended that SSO expand its academic partnerships to include other leading universities in Thailand. Involving multiple universities will provide SSO with access to diverse expertise, a wider talent pool, enhanced innovation, and stronger academic networks. These expanded collaborations will not only support the growth of actuarial science in Thailand but also position SSO as a central player in nurturing the next generation of professionals, thereby reinforcing the long-term stability and sustainability of Thailand's social security system.

4. Challenges in Translating Outputs into Policy Reforms

While the project has produced high-quality technical outputs, such as reviews, reports, and recommendations, translating these into concrete policy reforms has proven challenging. The project document (PRODOC) seemed to assume that these activities would naturally lead to policy changes, without fully accounting for the political and economic factors necessary for such transitions. Social security policy reform is often a long-term process that involves a range of influences beyond the project's direct control. As a result, it is challenging to directly link the project's outputs to specific policy outcomes. Recognizing this, it is important to note that some impacts may take time to fully materialize, and the broader context in which these outputs are applied will significantly shape their effectiveness.

⁸ Delivered 14 lectures each year, for a total of 90 students over a four-year period, during the 2nd semester of each year.

5. Trust as a Foundation for Stability and Sustainability

Trust is essential for the stability and sustainability of the Social Security Fund. The involvement of the ILO in providing technical support and normative advice has been beneficial for the SSO and its stakeholders. However, it is crucial that the ILO communicates its analytical results—especially those related to the stability and sustainability of the funds—in a way that reinforces, rather than undermines, confidence in the SSO. Clear, transparent, and accessible communication is key to maintaining and strengthening trust among all stakeholders.

To further build trust and ensure the long-term stability of the social security system, the ILO and SSO could enhance collaboration through joint public awareness campaigns, regular stakeholder forums, and collaborative research projects. By adopting these strategies, the ILO and SSO can reinforce stakeholder confidence and ensure that the social security system remains robust, trusted, and sustainable for the future.

6. Use of Project Knowledge as Catalysts for Change

SSO staff have expressed positive feedback regarding the project, particularly valuing the additional support and knowledge they have gained, which they have actively applied in their work. The skills and insights acquired through the project are likely to serve as catalysts for future change, with the potential to drive further improvements within SSO. However, the limited engagement with senior management and other key stakeholders may have restricted the broader organizational impact of these outputs. Although the project is nearing its completion, the foundations laid by these efforts could still influence SSO's strategic direction if sustained and built upon in future initiatives.

Moving forward, future engagement between SSO and the ILO is likely to shift towards broader policy issues, such as pension reform, coverage extension, and long-term care. These areas align with the priorities of SSO senior management, who are focused on the stability and sustainability of the social security system. Moreover, the project's successful approaches could be adapted and applied in other ASEAN countries through a regional actuarial facility, particularly in areas such as coverage extension and actuarial valuation practices.

In summary, the ILO project has made substantial progress in strengthening SSO's capacity in actuarial work, management, investment and policy design. While challenges remain in translating technical outputs into immediate policy reforms, the project's contributions to capacity building, research development, and institutional strengthening are significant and poised to have a lasting impact. Moving forward, expanding academic partnerships, fostering strong collaboration with the ILO to enhance stakeholder trust, and maintaining clear, transparent communication will be essential. By continuing to build on these successes, SSO can ensure the sustainability and effectiveness of Thailand's social security system well into the future.

Sustainability

A key issue in ensuring that the results of the project are likely to have a long-term, sustainable positive contribution to the project objective and relevant targets will be the formal establishment of the Actuarial Bureau by the RTG. The SSO should take all necessary steps to ensure that this is achieved. It would appear that there is nothing further required from ILO in this regard. However, it is important to note that delivery of

two actuarial valuation models, the training to use them and related documentation will assist in the sustainability of the work done.

As the project concludes, the need for a subsequent phase focused specifically on actuarial work appears limited. The technical work related to the actuarial valuations for both the Workers Compensation Fund (WCF) and the Social Security Fund (SSF) has been completed and is already informing policy decisions. With these valuations in place, future actuarial work will not be needed for several years.

Apart from that, it would seem advisable that ILO at the senior level should meet with senior management in the SSO to discuss how best ILO and SSO can now continue their long-standing relationship and how ILO can support SSO in line with its strategic priorities.

In terms of policy reform, this is fundamentally a matter for the RTG and ILO can only continue to provide technical support and advice on key priority issues.

In the regional context, ILO should learn from the successes of this project and seek to broaden this funding model where possible. ILO should also learn from this project of the need to ensure high-level buy-in from the management of the partner agency, the need for excellent communication between project staff and the partner and the need for appropriate staffing structures (balancing administration skills and subject-matter expertise).

Cross-cutting issues

The project demonstrated notable efforts to address **gender equality, disability inclusion, alignment with international standards, and Sustainable Development Goals (SDGs)**, although there are opportunities for further improvement in some areas. These cross-cutting issues were integrated into various aspects of the project, contributing to its broader objectives of social protection reform and capacity building.

1. Gender Equality Integration

The project integrated gender considerations into several key areas, including activities aimed at extending social protection to vulnerable groups such as domestic workers, informal sector workers, and old-age pensioners—55% of whom are women. Efforts were also made to strengthen maternity benefits, particularly for women in the informal sector, ensuring they had access to essential protections and support.

- **Gender Balance in Participation:** The project maintained a strong focus on gender parity in participation, ensuring balanced representation in its activities. For instance, 58% of the participants in key informant interviews were female, and 80% of attendees in actuarial and investment training sessions were women. These efforts reflect the project's commitment to gender inclusiveness in capacity-building activities.
- **Gender-Responsive Policies:** The project also supported gender-responsive social security reforms aimed at enhancing maternal benefits for women in the informal sector. These reforms align with Thailand's national priorities on gender equity, aiming to reduce gender-related gaps in social protection coverage and benefits.
- **Data Disaggregation and Intersectionality:** While gender-disaggregated data was collected, there is scope for a deeper intersectional analysis that examines how

different social groups—such as age, disability status, and socio-economic status—are affected by social protection reforms. This intersectional approach could have provided more insights into the vulnerabilities of specific populations, especially women with disabilities or those in marginalized groups.

- **Unanticipated Effects in Gender Responsiveness:** An interesting and unanticipated effect observed was that **55% of social security subscriptions in the non-formal sector were held by women**, and **62% of women** continued their membership after resigning from formal employment, compared to **37% of men**. This highlights women’s growing awareness of the importance of social security coverage, particularly in the informal sector, positioning them as **key drivers** of social security adoption. These insights suggest a strategic opportunity to advocate for broader social security subscription through **women-led approaches**, leveraging women’s influence in their communities to extend coverage to more vulnerable groups. This data-driven analysis underscores the importance of understanding **gender-specific behaviors** to shape effective outreach and policy strategies.

2. Disability Inclusion

While disability inclusion was not an explicit focus of the project, there were implicit efforts to address disability-related issues through occupational health and safety measures, as well as provisions for job-related disability compensation. The project’s expansion of hospital care benefits to cover occupational health issues aligns with broader goals of reducing disability through preventive measures.

However, the absence of explicit objectives for addressing the specific needs of persons with disabilities prevented the project from being fully disability-inclusive. Future projects should ensure that disability inclusion is systematically integrated into design and implementation, in line with international standards such as the UN Disability Inclusion Strategy.

3. Alignment with International Standards

The project successfully leveraged the ILO’s contributions, particularly its comparative advantages in promoting International Labour Standards, the Social Security (Minimum Standards) Convention No. 102, social dialogue, and tripartism. It raised awareness among stakeholders about the importance of adhering to these international standards, which are critical to the sustainability and effectiveness of social security reforms.

Moreover, meeting international labour standards is essential to Thailand’s aspirations for accession to the OECD. Adhering to these norms enhances Thailand’s global standing and strengthens its commitment to ensuring fair and equitable labour practices, contributing to the broader goal of sustainable development.

4. Sustainable Development Goals (SDGs)

The project contributed to several key SDGs, particularly **SDG 1.3** (Implementing social protection systems), which focuses on providing adequate social protection to vulnerable populations. Additionally, the project contributed to:

- **SDG 1.a.2:** Proportion of total government spending on essential services (education, health, and social protection).
- **SDG 10.4.1:** Labour share of GDP, comprising wages and social protection transfers.
- **SDG 10.4.2:** Redistributive impact of fiscal policy.
- **SDG 3.8.1:** Coverage of essential health services.
- **SDG 3.8.2:** Proportion of the population facing large household expenditures on health as a share of total household expenditure or income.

These contributions reflect the project's alignment with Thailand's commitment to achieving the SDGs, especially in extending social protection and promoting decent work for all.

5. Lessons learned & good practices

This section looks at the lessons learned and emerging good practices in line with ILO guidance (see also Appendices 2 and 3).⁹

Lessons learned

The key lesson learned from this project is that there is a need in designing a project to take into account the broader political and socio-economic context in order to maximize the possibility that the project outputs will lead to a sustainable impact in terms of actual outcomes. This includes recognizing the influence of local governance structures, economic realities, and political dynamics (for example, shift in the SSO board system affecting decision-making process) which can either enable or hinder the implementation of technical outputs. These factors must be carefully analysed and integrated into project planning from the outset to ensure that recommendations and technical support align with the environment in which they are to be applied.

Currently ILO projects tend to assume that quality outputs, e.g. technical advice and training, will lead to positive outcomes without sufficiently taking into account the complex political and socio-economic context. However, this project demonstrated that while technical work is essential, it is not enough on its own. Success depends on the alignment of these outputs with the local socio-political environment. For instance, political shifts, institutional resistance, or lack of stakeholder buy-in can delay or obstruct the intended outcomes, regardless of the quality of the technical support provided. Failure to take these factors into account will increase the risk that project outputs do not lead to a sustainable and positive impact.

Conversely, identifying and addressing these factors (insofar as possible) will tend to increase the possibility that outputs are converted into sustainable outcomes. Strategies such as proactive stakeholder engagement, maintaining an open dialogue with institutions like the SSO and Ministry of Labour, and adapting recommendations to fit the

⁹ See http://www.ilo.org/global/docs/WCMS_165981/lang--en/index.htm

specific organizational context can strengthen project success. By aligning the technical support with these considerations, ILO projects will be better positioned to achieve their long-term objectives and deliver impactful, lasting results.

Emerging good practices

The design of this project, whereby the project is funded by the duty bearer, is an emerging good practice. In many countries in which ILO works in developing regions, beneficiaries such as social security organisations have the resources to pay for ILO technical assistance. This will allow in-depth and focussed support to be provided to such agencies with a direct accountability of ILO work and deliverables to the client.

One of the key advantages of the duty-bearer-funded model is the **direct accountability** it creates between the ILO and the client. This model fosters a stronger relationship, as the client's financial stake in the project heightens the focus on clear deliverables and outcomes. It also allows for greater **flexibility and responsiveness**, as the ILO can adjust its technical assistance to meet the evolving needs of the duty-bearer, ensuring that the support remains aligned with the agency's priorities.

Additionally, this model can promote **sustainability** by encouraging local ownership of the project. Since the duty-bearer is actively involved in funding and shaping the project, there is a greater likelihood of continued commitment and investment in the project outcomes beyond the ILO's involvement. This enhances the prospects for long-term impact, as the client agency takes on a leadership role in the implementation and continuation of reforms.

Moreover, the duty-bearer-funded approach can help **optimize resources** across the ILO's global portfolio, enabling the organization to channel its own funding to regions or agencies with limited financial capacity, while still providing high-quality technical assistance to wealthier duty-bearers. This model also positions ILO to work with more **self-reliant partners**, who can leverage their own resources while benefiting from the ILO's expertise, creating a mutually beneficial partnership.

6. Conclusions & recommendations

Conclusions

Relevance

In general, the project's objectives, design and approach respond to the SSO's needs and RTG policies. In particular, the project design and objectives are in line with the goals outlined in the Thailand 2030 Agenda for SDGs, Thailand Decent Work Country Programme, Thailand national development plan, and the ILO Programme and budget. In relation to SSO involvement, the detailed project activities were agreed with SSO initially and then regularly at Working Team and PSC meetings. However, it is less clear that SSO fully bought-in to the project and felt ownership of the activities over the lifetime of the project. In terms of the project responding to the needs of Thailand tripartite constituents, the project has included activities involving employers' and employees' associations but respondents felt that they could have been more actively involved.

The project adopted an innovative approach for ILO whereby the project was funded by the beneficiary rather than a third party. We identify this as an emerging good practice. In general terms the project design was appropriate. However, with the benefit of hindsight,

it was perhaps overambitious and included too many activities. Given the length of the project, it would have been advisable to build in the possibility of revising the activities over time. The project was also based on the assumption that the provision of quality advice would lead to policy change and did not sufficiently take account of the need to factor in the complex political and socio-economic context. We have identified this as a lesson learned for the ILO. Critically, the project did not address the need to ensure appropriate communication and did not include an NPC or adequate interpretation from the start. Finally, in implementation, neither ILO nor SSO adequately responded to or escalated challenges when they became clear so that the weaknesses in project design were never adequately addressed.

Coherence

The project was coherent with other work been carried out by the UN and the ILO country office including work on the review of pensions and a Social Protection Diagnostic Review. The project co-operated with the activities being carried out by the UNJP on social protection. The project also drew on and contributed to the expertise of social protection specialists in ILO BKK. An indirect objective of the project for ILO was to explore the possibility of developing a Regional Actuarial Services Unit, that would be the ground for the provision of these services to other countries in the region.

Effectiveness

The SSO project has made meaningful strides toward achieving its intended outcomes, though some critical challenges have delayed the full realization of its objectives. The project focused on three main outcomes:

Outcome 1: Establishing the Actuarial Bureau and Strengthening Actuarial Capacity The project has successfully provided extensive support for the establishment of the Actuarial Bureau, including developing its structure, defining staffing requirements, and proposing salary packages with incentives. Despite these comprehensive efforts, formal approval from SSO senior management has not yet been secured. The proposal to establish the AB was submitted to the Office of the Civil Service Commission (OCSC) and the Comptroller General's Department for consideration.

Outcome 2: Enhancing Capacity in Policy Design The project's actuarial valuation outputs have significantly contributed to SSO's policy design efforts and have been frequently utilized to inform policy decisions. The quality of the investment strategy review has also been recognized as high; however, the recommendations have only been partially accepted by SSO. This partial acceptance underscores the need to better align the project's recommendations with SSO's operational priorities and risk preferences.

Outcome 3: Raising Awareness Among Key Stakeholders The scope of work under Outcome 3 has been scaled down compared to initial plans. The project's efforts in reviewing and advising on communication strategies are valid and align with its objectives. However, the adoption of these strategies has been limited because the work is managed by a department outside the mandate of the Research and Development Division. This separation may limit the effectiveness and integration of the project's outputs within the broader organizational strategy. Additionally, the limited engagement with social partners during the project design phase, combined with the constraints imposed by COVID-19, has hindered more substantive forms of social dialogue.

Efficiency

The allocation of financial, human, institutional, and technical resources has been largely appropriate for achieving the project's outputs. The project effectively leveraged resources from the UN Joint Programme on Social Protection for All, leading to significant savings, particularly in human resources. This strategic collaboration provided valuable coordination support and technical expertise, enhancing the project's capacity without additional financial strain. However, some challenges were encountered in resource allocation, particularly in translation and interpretation services, which are essential for effective communication within the Thai-speaking environment. Initially, there was no budget allocation for these services, necessitating the reallocation of resources to address this gap. Furthermore, the project highlighted the importance of having a local coordinator and translators with a sufficient understanding of the social protection system, a need that was not fully anticipated in the original project design.

The overall resourcing of activities has positively contributed to the project's performance and impact. Nonetheless, the initial staffing structure had some limitations, particularly with the absence of a dedicated national project coordinator (NPC) focused solely on this project. Moreover, the staffing structure (administration v expertise) has presented certain challenges. Due to the impact of COVID-19 and other contextual factors, including the complex dynamics of the project environment, there has been a reduced physical presence of the CTA at SSO. This has inadvertently limited opportunities for on-site coaching and active engagement, which are critical components of the project's success. Given these circumstances, there may be merit in exploring alternative structures that are more adaptable to the evolving needs of the project and better aligned with the outcomes achieved. Such an approach could ensure that resources are utilized effectively while maintaining fairness and enhancing the overall efficiency of the project.

Impact

The ILO project has had a substantial impact on enhancing the capacity of the Social Security Office (SSO) in actuarial science and policy design. While the project's direct influence on immediate policy reforms has been moderated by various factors, its contributions to capacity building, research development, and institutional strengthening are likely to yield long-term benefits that extend beyond the project's duration.

One of the most significant impacts of the project has been the enhancement of SSO's actuarial and policy analysis capacity. The project successfully developed the foundational structures for the Actuarial Bureau and provided extensive models and training to SSO staff. This has equipped them with the necessary skills to manage and evaluate social security funds more effectively. The strengthened capacity within SSO is expected to have a lasting impact, enabling the organization to carry out actuarial work with greater independence and proficiency, contributing to the overall stability and sustainability of Thailand's social security system. The project has also made important strides in strengthening SSO's capacity to conduct research that informs policy.

In summary, the ILO project has made substantial progress in strengthening SSO's capacity in actuarial science and policy design. While challenges remain in translating technical outputs into immediate policy reforms, the project's contributions to capacity building, research development, and institutional strengthening are significant and poised to have a lasting impact. Moving forward, expanding academic partnerships, fostering strong collaboration with the ILO to enhance stakeholder trust, and maintaining clear,

transparent communication will be essential. By continuing to build on these successes, SSO can ensure the sustainability and effectiveness of Thailand's social security system well into the future.

Sustainability

Delivery of two actuarial valuation models, the training to use them and related documentation which will assist in the sustainability of the work done. However, a key issue in ensuring that the results of the project are likely to have a long-term, sustainable positive contribution to the project objective and relevant targets will be the formal establishment of the Actuarial Bureau by the RTG. The SSO should take all necessary steps to ensure that this is achieved. To support this and build long-term relationships, ILO at senior level should meet with senior management in the SSO to discuss how best ILO and SSO can now continue their long-standing relationship and how ILO can support SSO in line with its strategic priorities.

In the regional context, ILO should learn from the successes of this project and seek to broaden this funding model where possible. ILO should also learn from this project of the need to ensure high-level buy-in from the management of the partner agency, the need for excellent communication between project staff and the partner and the need for appropriate staffing structures (balancing administration skills and subject-matter expertise).

Cross-cutting issues

The project made notable efforts to address gender equality, disability inclusion, alignment with international standards, and Sustainable Development Goals (SDGs). Gender considerations were integrated into several activities, such as extending social protection to vulnerable groups like domestic workers and informal sector workers, with a focus on strengthening maternity benefits. However, it cannot be said that gender equality was fully mainstreamed throughout the project design and implementation, as there was a lack of a thorough gender analysis.

The project successfully leveraged the ILO's contributions, particularly in promoting International Labour Standards, including the Social Security (Minimum Standards) Convention, No. 102, social dialogue, and tripartism, raising awareness among stakeholders. It also made significant contributions to the SDGs, particularly SDG 1.3, which focuses on expanding social protection coverage to vulnerable populations. Nonetheless, further efforts to integrate disability inclusion and conduct deeper intersectional analysis would have strengthened the project's overall cross-cutting impact.

Recommendations

While the report offers several detailed recommendations addressing various aspects of the evaluation—such as relevance, coherence, effectiveness, efficiency, impact, sustainability, and cross-cutting issues—this section highlights three key recommendations that are of particular importance to the continued success and sustainability of the project's objectives:

1. SSO should take **all necessary steps to ensure that the Actuarial Bureau is formally established**. Establishing the Actuarial Bureau is essential to strengthening SSO's capacity for actuarial analysis and policy development. It will ensure the social

security system remains financially sustainable and responsive to emerging risks. Delays in its formation could limit the project’s impact and hinder long-term planning. Prioritizing the Bureau’s establishment is crucial for the SSO’s future.

2. ILO at senior level should meet with senior management in the SSO to discuss **how best ILO and SSO can now continue their long-standing relationship** and how ILO can support SSO in line with its strategic priorities. For example, ILO and SSO could enhance collaboration through joint public awareness campaigns, regular stakeholder forums, and collaborative research projects. By adopting these strategies, the ILO and SSO can reinforce stakeholder confidence and ensure that the social security system remains robust, trusted, and sustainable for the future.
3. ILO should learn from the successes of this project and seek to **broaden this funding model where possible**. ILO should also learn from this project of the need to ensure high-level buy-in from the management of the partner agency, the need for excellent communication between project staff and the partner and the need for appropriate staffing structures (balancing administration skills and subject-matter expertise) to optimize project outcomes.

Recommendation	Responsible	Priority	Timeframe	Resource implications
Ensure that the Actuarial Bureau is formally established	SSO	High	Short-medium term	To be determined
ILO and SSO further develop the relationship	ILO CO and SSO management	High	Immediate	None directly
Expand duty-bearer-funding approach to new local projects and other countries	ILO BKK social protection	High	Short-medium term	None directly for ILO

Appendices

Appendix 1. Activities and outcomes assessed against the original plan

Project structure	Indicators	Means of verification	Status (per Evaluation team)
Development Objectives:			
To enhance the effectiveness, efficiency and sustainability of Thailand Social Security System and, therefore, contribute to enhanced and improved social protection of people residing in Thailand			
Immediate Objective / Outcome 1: The SSO Actuarial Bureau (SAB) is in place and its team is equipped to provide the organization with actuarial services	<p>SAB is created and running</p> <p>SAB staff conducts an actuarial valuation with only the support of the CTA according to the CTA planned work-months</p>	<p>Approval by the Office of Civil Service Commission</p> <p>Part of the next SSO Strategic Plan</p> <p>SAB Actuarial Report</p>	The project has completed extensive work to support AB, including laying the foundation through structure development, staffing assessments, career paths, and salary determinations. This has created a strong platform for the eventual establishment of AB, though additional planning is needed to bring this to fruition.
Outputs			
1.1 SSO Actuarial Bureau structure developed and approved	SAB structure approved by the management of SSO	Approval document signed by the management	AB structure has been prepared by the project but not formally approved by SSO.
1.2 SSO Actuarial Bureau officials have enhanced capacity	At least 50% of trained project assistants become SAB staff	Number of staff contracts	The Indicator not assessable due to the non-establishment of the Actuarial Bureau.

Project structure	Indicators	Means of verification	Status (per Evaluation team)
through their participation in training activities	Number of trainings	Training reports	Extensive training has been carried out in four thematic courses.
	Number of staff trained	Training reports	Approximately 60 people trained 10 were trained in actuarial science
Immediate Objective / Outcome 2: Relevant Social Security Gender Responsive Policy reforms are prepared, informed by evidence produced by the SSO Actuarial Bureau and by the Project services	Reforms relevant to pension sustainability and adequacy are adopted	Modifications to legislations Modifications to SSO strategic plan	Much work on policy issues e.g. pensions, and coverage has been carried out.
	Reforms relevant to coverage extension are adopted	Modifications to legislations Effective coverage has increased	There have been some areas where policy work has informed legislation (e.g. COVID response, benefits uprate, investment) Coverage extension work is only now being completed
Outputs			
2.1: Report is available to inform a gender responsive Pension Reform in 2017/18, using the actuarial model developed by ILO to carry out the actuarial valuation of 2015, updated to incorporate the latest discussions (2017) - including adding a survivor pension	Technical notes to the satisfaction of SSO; Meetings with stakeholders	Technical note List of participants	<i>Pension report completed, planned report on gender not done (as agreed by SSO)</i> <i>Report on C102 completed (not in original plan) and various policy briefs</i>
2.2: Policy recommendations for universal social protection for all women and men are available, including costing estimations	Feasibility study report, which include findings of the dialogue process and roadmap for coverage extension	Report	<i>Work on coverage extension is almost completed</i>
2.3: SSO Actuarial Review produced and available to	Actuarial valuation produced mainly by SAB staff	Reports	<i>SSO Actuarial Valuation and model completed</i>

Project structure	Indicators	Means of verification	Status (per Evaluation team)
inform policy decisions	Actuarial valuation produced		and presented to SSO
2.4: Workers compensation actuarial valuation produced and available to inform policy decisions	Report on recommendations on options, financial impacts and recommendations	Report	WCF Actuarial Valuation and model completed and presented to SSO
2.5: Options for the introduction of contributions from retired members for health insurance: available and presented to the Social Security Office board	Report on Funding Policy finalized and discussed with the SSO Board	Report	Activity 2.5 does not appear to be a high priority for SSO. Some work done
2.6: A Gender responsive Funding Policy and reviewing the Investment Policy established	Report on investment policy review is finalized and discussed with the SSO Board	Report	Investment strategy work has been completed and model delivered
2.7: Research and dialogue on options to expand the scope of hospitals available to SSO members for use	Report with policy options (including costs)	Report	Activity 2.7 does not appear to be a high priority for SSO.
2.8: Increased knowledge of SSO Staff (central level and provincial level) on social security concepts and principles (covering all projects), with a minimum critical mass of 35% women course facilitators as well as participants, with the target of parity (45% to 55%)	Training material Number of women and men trained	Training material List of participants	The project commissioned an agency to review SSO training function and develop a strategy

Project structure	Indicators	Means of verification	Status (per Evaluation team)
Immediate Objective / Outcome 3: Thai society is increasingly aware of the functioning of social security schemes and to the importance of gender responsive Social Security	SSO Annual research of people satisfaction, awareness, experience Improvement in the indexes measured by the Annual research	SSO Annual research document SSO Annual research document	Various activities completed here but does not appear to have been any research on issues mentioned under indicators
3.1: Journalists and/or correspondents have increased knowledge in Social Security topics, with the target of parity	Training material produced Number journalist trained (women and men)	Training material List of participants Evaluation forms	Consultant produced report on 3.1, 3.3 and 3.6
3.2: Social Partners have increased knowledge in Social Security topics, with a focus on those represented in SSO Board, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)	Training material produced Number of social partners trained (women and men participants)	Training material List of participants Evaluation forms	Some activities completed
3.3: Capacity of all SSO Departments increased to communicate social security gender responsive technical messages	Communication package produced Number of workshops Number of departments	Communications package List of participants/departments	Project commissioned an assessment report of the communications function of SSO
3.4: Annual Public Statistical and Actuarial Updates available and shared with the broad public (one per year), including gender disaggregated data	New section on the annual report is produced and online	SSO Website	In addition to the new section on the annual report, SSO produces comprehensive annual statistical reports on social security accessible online.
3.5: Increased knowledge of the	Training material produced	Training material List of trainings	Advocacy event was organised in line with the MOL and

Project structure	Indicators	Means of verification	Status (per Evaluation team)
<p>planning agency, line ministries and parliamentarians in the area of social insurance, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)</p>	<p>Number of trainings Number of women and men trained</p>	<p>List of participants</p>	<p><i>SSO request. The event, SSO Sustainable Social Security for all, was held at the MOL on 31 May 2024.</i></p>
<p>3.6: A public dialogue on Social Security is created at the national level involving broad relevant national stakeholders, inclusive of women representative associations</p>	<p>A dialogue mechanism is created at the national level</p>	<p>Dialogue mechanism Meetings' minutes</p>	<p><i>Not implemented due to changes in SSO's priorities.</i></p>

ILO Lesson Learned Template

Project Title: Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand

Project TC/SYMBOL: THA/19/01/THA

Name of Evaluator: Mel Cousins & Thamana Lekprichakul

Date: 30 August 2024

The following lesson learned has been identified during the course of the evaluation. Further text explaining the lesson may be included in the full evaluation report.

LL Element	Text
Brief description of lesson learned (link to specific action or task)	There is a need in designing a project to take into account the broader political and socio-economic context in order to maximize the possibility that the project outputs will lead to a sustainable impact in terms of actual outcomes. This includes identifying key factors such as local governance structures, economic conditions, and socio-cultural-political dynamics that could affect the uptake and implementation of project recommendations. Additionally, investing in policy advocacy skills is critical to effectively bridge the gap between technical work and policy adoption.
Context and any related preconditions	Currently ILO projects tend to assume that quality outputs, e.g. technical advice and training, will lead to positive outcomes without sufficiently taking into account the complex political and socio-economic context. However, without a thorough understanding and integration of the complex political and socio-economic context, these outputs may not achieve the intended long-term impact.
Targeted users / Beneficiaries	Project designers, including senior management and on-the-ground coordinators, as well as local partners and government agencies involved in project planning and implementation.
Challenges /negative lessons - Causal factors	Failure to account for political and socio-economic factors can significantly increase the risk that project outputs do not translate into sustainable and positive impacts. A common feedback received from informants is that while the ILO's technical work is highly regarded, its recommendations often lack practical applicability within the Thai context. This indicates a need for better contextualization of recommendations to enhance their adoption by policymakers. Furthermore, there is a recognized need to invest in policy advocacy skills to effectively link technical work with policy adoption. For example, a lack of local stakeholder engagement or misunderstanding of the local political landscape can lead to resistance or non-implementation of project recommendations.

<p>Success / Positive Issues - Causal factors</p>	<p>Conversely, identifying and addressing these factors (insofar as possible) will tend to increase the possibility that outputs are converted into sustainable outcomes. Strategies such as stakeholder analysis, early engagement with local experts, and continuous monitoring of the socio-economic environment can enhance project success. Additionally, ensuring that technical recommendations are tailored to the local context, supported by strong policy advocacy, and reinforced by building rapport with key stakeholders, will significantly boost their relevance and adoption by policymakers.</p>
<p>ILO Administrative Issues (staff, resources, design, implementation)</p>	<p>There is a need in designing a project to take into account the broader political and socio-economic context in order to maximize the possibility that the project outputs will lead to a sustainable impact in terms of actual outcomes. This includes identifying key factors such as local governance structures, economic stability, and cultural dynamics that could influence the project's success. Additionally, investing in policy advocacy skills is critical to effectively bridge the gap between technical work and policy adoption.</p>

Appendix 3. Emerging good practice

ILO Emerging Good Practice Template

Project Title: Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand

Project TC/SYMBOL: THA/19/01/THA

Name of Evaluator: Mel Cousins & Thamana Lekprichakul

Date: 30 August 2024

The following emerging good practice has been identified during the course of the evaluation. Further text can be found in the full evaluation report.

GP Element	Text
Brief summary of the good practice (link to project goal or specific deliverable, background, purpose, etc.)	The design of this project, whereby the project is funded by the beneficiary, is an emerging good practice. This model has several advantages that contribute to the sustainability, relevance, and effectiveness of development initiatives, including enhanced ownership and commitment, alignment with local needs, and increased empowerment and accountability & transparency among beneficiaries. Additionally, it promotes long-term sustainability by reducing dependence on external funding.
Relevant conditions and Context: limitations or advice in terms of applicability and replicability	In many countries in which ILO works in developing regions, duty bearers such as social security organisations have the resources to pay (at least in part) for ILO technical assistance. This will allow in-depth and focused support to be provided to such agencies plus organisation of regional activities which benefit other countries.
Establish a clear cause-effect relationship	Without funding from SSO, it would not have been possible to provide such in-depth support to that agency. In addition, the SSO project allowed ILO to support regional actuarial expertise which contributed to other work in Thailand and to other countries in the region.
Indicate measurable impact and targeted beneficiaries	Both ILO and organizations such as SSO can benefit from this beneficiary funded approach in that the beneficiary can receive specifically targeted support co-designed by them and ILO can support regional expertise which would otherwise not be feasible.
Potential for replication and by whom	This approach can be replicated in other countries in the region and also in other ILO regions where agencies have the resources to fund (or co-fund though cost sharing) ILO activities
Upward links to higher ILO Goals (DWCPs, Country Programme Outcomes or ILO's Strategic Programme Framework)	This approach aligns with the Decent Work Country Programme (DWCP) 2023-27, which seeks to address the adequacy of social protection benefits, expand coverage for informal workers, and strengthen the social security system to ensure inclusive protection for all. It also supports the Country Program Outcomes (CPO THA251) aimed at improving the existing social security systems and enhancing equity and coverage expansion to the informal sector. At the regional level, it contributes to the Regional Outcome (RAS 126), which focuses on increasing the capacity to promote decent work for all. Furthermore, this approach is in line with the ILO Strategic Plan 2022-25 'Optimizing the use of ILO resources,' and supports the global commitment to SDG target 1.3, which calls for implementing nationally appropriate social protection systems for all.

Other documents or relevant comments	<p>While the duty-bearer-funded model offers significant advantages, users should be aware of some potential challenges. This approach may lead to an overemphasis on short-term gains, as beneficiaries might prioritize immediate benefits over long-term sustainability. Additionally, the financial burden placed on beneficiaries could create stress or resentment, particularly if the anticipated outcomes are delayed. There's also a risk that the project may become too narrowly focused on the specific needs of contributing beneficiaries, limiting its flexibility to address broader issues. Finally, Furthermore, relying on a single funding source can create a dependency dynamic, where the project's direction and success are heavily influenced by the duty-bearer's priorities. This dependency may reduce the project's autonomy, limit its ability to adapt to evolving needs, and introduce sustainability risks if the duty-bearer changes its focus or withdraws support. Being mindful of these factors can help mitigate risks and ensure the model's success.</p>
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Appendix 4. Terms of Reference

Terms of reference¹⁰

Independent Final Evaluation of a project on Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand

11 June 2024

Project Code	THA/19/01/THA
Project Period	1 July 2019 to 30 September 2024
Type and Timing of the evaluation	Independent final evaluation; May to July 2024 (data collection is expected to be in June 2024)
Donor and Funding	Government of Thailand, Social Security Office USD 1,354,000
Partners	Social Security Office of Thailand Ministry of labour of Thailand
P&B outcomeTR	Outcome 6: Gender equality and equal opportunities and treatment for all in the world of work Outcome 7: Adequate and effective protection at work for all Outcome 8: Comprehensive and sustainable social protection for all DWCP outcome THA 251 improving the existing social security systems - bringing gaps of inequality and expanding coverage of social protection/social security to the informal sector
Contributing to SDGs	SDG target 1.3 “Implement nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of the poor and the vulnerable”
Administrative unit	ILO Country Office for Thailand, Lao PDR, and Cambodia
Technical Backstopping Unit	ILO Decent Work Technical Team for East and South-East Asia and the Pacific and Actuarial Services Unit of the Social Protection Department
Evaluation Manager	Pamornrat Pringsulaka, ILO Regional Evaluation Officer

¹⁰ TOR maybe slightly revised pending inputs from SSO, Thailand

1. Introduction

These Terms of Reference (TOR) concern a final independent evaluation of the project entitled “Strengthening Social Security Office capacities in policy design with a focus on research and actuarial services, Thailand”. Hereafter, to be called ‘the project.’ It sets out the purpose, scope, and objectives of the final evaluation. The independent final evaluation aims to examine the extent to which the project outcomes’ have been achieved and it will be conducted systematically and impartially as much as possible

The project is coming to its end in September 2024 and as per the ILO evaluation policy, an independent final evaluation will be conducted. The project conducted its internal midterm evaluation in early 2022.

The Project Document’s provision on evaluation, the UN Evaluation Group(UNEG) for evaluation, ILO’s *Policy guidelines for results-based evaluation*¹¹ provide the framework for carrying out the Project’s independent final evaluation. The evaluation will address the evaluation’s objectives that address the OECD/DAC evaluation criteria including relevance, coherence, efficiency, effectiveness, impact and sustainability, and ILO cross-cutting evaluation criteria and concerns including gender equality and non-discrimination, promotion of international labour standards and social dialogue. The evaluation will provide strategic recommendations, lessons learned for future projects of similar objectives.

The final evaluation will be managed by an independent certified ILO Evaluation Manager, who has no previous involvement with the project and it will be conducted by an independent evaluator(s). The evaluation will systematically assess the performance of the project against a set of key criteria and derived questions, document lessons learned and good practices, and make recommendations for possible similar future interventions.

The evaluation complies with the United Nations Evaluation Guidelines (UNEG) Norms and Standards, ILO policy guidelines (4th edition). Key stakeholders, including the donor and key partners, ILO-DWT/CO- Bangkok Office, and ILO technical backstopping unit, will be consulted throughout the evaluation process.

2. Project Background

Thailand has one of the most comprehensive social protection systems in the Asia-Pacific Region. However, issues like the adequacy of benefits and the future sustainability of the system are significant challenges, particularly in a context of rapid ageing and a high dominance of the informal economy. The current social protection system, including the social insurance scheme run by the Social Security Office (SSO) as a major pillar, needs to adapt to new social and economic challenges, including an ageing society. Coverage needs to be improved to reach those without standard working careers. The need for further reforms towards the development of more comprehensive, inclusive and integrated schemes is recognised in the country as a key priority. The project, which is a result of extensive consultations with the SSO and constituents, aims to provide concrete outcomes to support social protection development and capacity in Thailand. It also builds on a long history of social protection work undertaken by the ILO in the support and promotion of social security in Thailand.

The project is funded by the SSO, Thailand. It is a pioneer project that aims to develop and strengthen actuarial and research capacity and expertise. The project is managed by an ILO Senior Actuary who works within the SSO to support capacity building and to strengthen social security through better policymaking and management. As well as the Senior Actuary, the project calls on other ILO expertise and resources to support the project.

The Project is aligned with the objectives of the 12th National Economic and Social Development Plan (2017-21) and the 20th-year national strategy (2017-2036). The 20-year national strategic plan consists of six areas, six primary strategies, and four supporting strategies. The six areas include (1) security, (2)

¹¹ http://www.ilo.org/eval/Evaluationpolicy/WCMS_168289/lang--en/index.htm

competitiveness enhancement, (3) human resource development, (4) social equality, (5) green growth, and (6) rebalancing and public sector development. The 12th Plan is geared to reduce income disparity and poverty, strengthen the Thai economy and enhance the country's competitiveness, promote natural capital and environmental quality, and further boost the confidence of Thailand in the international community. The Project also contributed to the objectives of the 5 years Strategic Plan for the Social Security Office of Thailand (2015-2019).

The development objective of the project is to enhance the effectiveness, efficiency and sustainability of Thailand Social Security System and therefore contribute to enhanced and improved social protection of women and men residing in Thailand.

There are three project outcomes:

Outcome 1 – The SSO Actuarial Bureau is in place and its team has the necessary capacity to provide the organization with actuarial services

Output 1.1: SSO Actuarial Bureau structure developed, approved and ongoing management processes defined

Output 1.2: SSO Actuarial Bureau officials have enhanced capacity through their participation in training activities and continuing professional development

Outcome 2 – Relevant and gender responsive Social Security Policy reforms are prepared and approved by the Thai Government, informed by evidence produced by the SSO Actuarial Bureau and by the Project services

Output 2.1: Analysis and input into policy and reform options

Output 2.2: Policy, management and administration recommendations for extending social protection for all women and men, including costing estimations

Output 2.3: SSO Actuarial Review produced and available to inform policy decisions

Output 2.4: Workers compensation actuarial valuation produced and available to inform policy decisions

Output 2.5: Retirees' contributions for health and other health related issues

Output 2.6: Investment Governance, developing a Funding Policy and reviewing Investment Policy and management

Output 2.7: Research and dialogue on options to expand the scope of hospitals available to SSO members for use

Output 2.8: Training of SSO staff /improving social security knowledge

Outcome 3 – Thai society, including social partners and Thai citizens in general, is increasingly aware of the functioning of social security schemes and to the importance of gender responsive Social Security.

Output 3.1: Journalists and/or correspondents have increased knowledge in Social Security topics, with the target of parity

Output 3.2: Social Partners have increased knowledge in Social Security topics, with a focus on those represented in SSO Board, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)

Output 3.3: Capacity of all SSO Departments increased to communicate social security gender responsive technical messages

Output 3.4: Annual Public Statistical and Actuarial Updates available and shared with the broad public (one per year), including gender disaggregated data

Output 3.5: Increased knowledge of the planning agency, line ministries and parliamentarians in the area of social insurance, with minimum critical mass of 35% women participants, with the target of parity (45% to 55%)

Output 3.6: A public dialogue on Social Security is created at national level involving broad relevant national stakeholders, inclusive of women representative associations

Institutional Framework: The ILO is an executing agency responsible for overseeing the technical and administrative aspects of project implementation. This includes supervision of the policy

recommendations and other project outputs to ensure their conformity with the ILO Conventions and Recommendations. The project is under the overall responsibility of ILO Country Office for Thailand, Cambodia and Lao PDR.

The project management is led by a Chief Technical Advisor with two project team members, a National Project Coordinator who is responsible for day-to-day management of the project, and a Finance and Administrative Assistant. The Project management is done in strict articulation with the Social Security Office management

The project has been technically backstopped by the ILO Senior Technical Specialist on Social Protection from the Decent Work Technical Support Team for East and South-East Asia and the Pacific based in Bangkok and the Head of the Actuarial Services Unit from the ILO Social Protection Department in Geneva. ILO has worked in strict articulation with the SSO Secretary General and the Unit in charge of Actuarial Services.

In addition, the Project closely coordinates activities with the Workers' activities and Employers' Activities Specialists of the ILO DWT in Bangkok, particularly in activities related to the capacity building of social partners.

Project steering committee : The PSC has been set up with representatives of the ILO CO-Bangkok and the SSO to oversee the progress of the project implementation. From the SSO side, led by the SSO Secretary General, PSC composes relevant senior management and members of SSO Board of Management which include worker and employer representatives. The PSC meets once or twice a year and oversees, reviews and signs off on project activities, deliverables, work plans and budget planning.

Key stakeholders/partners: The main partner of the Project is Thailand Social Security Office. The Project also includes collaboration with other stakeholders who directly or indirectly involved in the topic of social protection, including other government departments, workers' and employer's organizations, research institutes and other national and international organisations. The project also works with academic partners i.e. Mahidol University and its Actuarial Science course.

3. Evaluation Purpose, Scope and Clients

Purposes: The final evaluation has two purposes: accountability and learning. The evaluation will seek to determine ways in which the project has been delivered and whether its planned objectives have been fully realized as per the project document. The evaluation will also attempt to contribute to the learning and generating key stakeholders' knowledge by identifying and documenting the project's lessons learnt and emerging good practices.

The final evaluation has the following specific objectives: -

- To assess the project using OECD/DAC criteria with a focus on effectiveness, impact, and sustainability
- To assess the extent of changes in the SSO and constituents' capacity and institutional transformation that the project has brought in the area of social protection policy, financing, communication, investment, management and actuarial work
- to assess the extent to which gender equality/mainstreaming and empowerment of women has been considered throughout the project design and implementation.
- Identify unintended results (positive and negative) or unanticipated effects of the project on gender equality.
- Identify lessons learnt and good practice and strategic recommendations that can be applied to similar projects in future.
- to assess the extent to which the midterm evaluation recommendations were applied

Scope: Sets boundaries around the object of evaluation. It determines what is included in the evaluation and what is excluded. The scope of this evaluation is all activities of the project from the start of the project in July 2019 to the time of the final evaluation in 2024. This evaluation seeks to provide critical insights into the project's alignment with Thailand's social protection needs and outreach, the aims of the SSO in building capacity and the SSO's coordination with stakeholders.

The evaluation will address all crosscutting issues—COVID19 responsiveness, gender equality, disability inclusion and non-discrimination, and social transformation. In terms of this evaluation, this implies involving both men and women, families left behind and other social/cultural categories as relevant in the consultation. Moreover, the evaluators should review data and information that are disaggregated by sex at a minimum and assess the relevance and effectiveness of gender-related strategies and outcomes to improve lives of women and men. All this information should be included in the inception report and final evaluation report.

The clients: will be the project management team, the donor (SSO), ILO Regional Actuarial Services , ILO Country Office for Thailand, Cambodia and Lao PDR. Secondary parties making use of the results will include tripartite constituents, academia, and civil society organizations who have partnered with the project.

4. Evaluation Criteria and Questions

Based on UNEG, and ILO guidelines and standards, the criteria in Table 1 will be applied to assess the relevance of the project to target group's needs, the coherence of the project, the project effectiveness, efficiency and the potential impact of the results and the potential for sustainability. For each criterion, two or three specific evaluation questions are suggested. The questions seek to address priority issues and concerns of the national constituents, SSO, and other stakeholders. In consultation with the Evaluation stakeholders, the evaluation team is expected to refine the below key questions and elaborate sub-questions and means for answering them in an evaluation matrix.

Table 1. Evaluation Criteria and Key Questions

Assessment Criteria	Questions to be addressed
<p>Relevance (<i>The extent to which the intervention objectives, design and approach continue to respond to beneficiaries, country, and partners/institution/donors' needs, policies, and priorities, and is expected to continue to do so if circumstances change (or have changed)</i>).</p>	<ul style="list-style-type: none"> • To what extent has the project design, objectives and approach support the goals outlined in the Thailand 2030 Agenda for SDGs, Thailand Decent Work Country Programme, Thailand national development plan, and the ILO Programme and budget (20-21 and 2022-23)? • To what extent has the project responded to the needs of Thailand tripartite constituents and key partners (SSO)? • To what extent the project has responded and adapted appropriately and according to the priorities and needs of the Thai government workers and employers' organization and key stakeholders within the shifting and dynamic context at country levels, including COVID-19 pandemic? • To what extent is the project identifying, reaching and responding to the priorities and needs of the most excluded groups e.g. those in the informal economy?

Assessment Criteria	Questions to be addressed
<p>Coherence <i>The compatibility of the intervention with other interventions in a country, sector or institution)</i></p>	<ul style="list-style-type: none"> • To what extent has the project adhered to decent work principles including international labour standards, human rights-based approach and gender equality and non-discrimination? • Within the parameters of the Thailand DWCP, assess the extent of compatibility of interlinkages between the project and other ILO or other UN projects in Thailand and other interventions carried out by SSO and Government and social partners.
<p>Effectiveness <i>(The extent to which the interventions achieved, or are expected to achieve, its objectives and its results, including any differential results across groups)</i></p>	<ul style="list-style-type: none"> • To what extent has the project achieved its planned objectives? Have all the outputs been delivered with quality and quantity as planned? If not, why? What are the risk factors, challenges and opportunities encountered that contributed to or adversely affected the following achievements: - <ul style="list-style-type: none"> - Improved national social protection strategies, policies or legal frameworks with extended coverage or enhanced benefits, the extent to those strategies, policies and/or legal frameworks are gender sensitive/responsive - Strengthened governance, management, administration, communication financial management including investment and sustainability of social protection delivery through policy and regulatory reform and institutional capacity building - Increased constituents capacity and an expanded knowledge base for an effective implementation of national social protection system, including SDG monitoring
<p>Efficiency <i>(The extent to which the intervention delivers, or is likely to deliver, results in an economic and timely way)</i></p>	<ul style="list-style-type: none"> • How economically and timely are the project resources/inputs (e.g. financial, human, institutional, technical, etc.) converted to results? • Is the project management capacities and structure (including the operational/implementation arrangements) facilitating good results and efficient delivery? • Is there a clear understanding of roles and responsibilities by all parties involved? How effective is communication between the project team, ILO Country Office, SSO, and other key partners? • How effectively does the project management team employ results based monitoring approach?
<p>Impact <i>(The extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level effects.)</i></p>	<ul style="list-style-type: none"> • To what extent have the projects' interventions contributed to transformative change due to national stakeholders' enhanced capacity on social security research and actuarial service? • How has the Project contributed to social protection reform process (including policy changes to relevant laws)? • Were there any unintended effects that may have been caused by the Project?

Assessment Criteria	Questions to be addressed
Sustainability(<i>The extent to which the net benefits of the intervention continue, or are likely to continue</i>)	<ul style="list-style-type: none"> • To what extent the actuarial bureau and staff capacities will likely be sustained? • The extent relevant and gender disaggregated information and statistical information made available to public and other relevant agencies
Crosscutting	<ul style="list-style-type: none"> • To what extent are gender and disability inclusion, and non-discrimination being mainstreamed as a cross-cutting concern throughout project design, implementation and deliverable? • To what extent the project enhanced social dialogue and tripartism and promoting ILO Labour standards. • To what extent has social dialogue contributed to achieving the planned objectives? Any lessons learned?

5. Evaluation Approach and Methodology

The evaluation will use a mix of evaluation approaches and ensure triangulation of information using available information such as current results achievements, annual reports of the project, research studies, currently available data sources etc. It will use a theory-based and gender responsive approach to examine the project achievement.

It will use a mixed methods approach (e.g. document analysis, interviews, direct observation and surveys) to ensure the validity and reliability of the findings. It will, in part, use a participatory approach in that, to the extent possible, the evaluation will involve key stakeholders such as SSO, Min. of Labour, social partners, civil society, other government agencies, and strategic partners.

Evaluation methodology

The following are suggested methodologies but are not exhaustive. The evaluator may adapt the methodology outlined in this TORs, but any fundamental changes should be agreed upon by the evaluation manager, and reflected them in the inception report.

- A desk review will analyze the project and other documentation including the Theory of change, the log-frame, implementation plan, technical progress reports, project deliverables and other relevant documents. The desk review will suggest a number of initial findings that in turn may point to additional or fine-tuned evaluation questions. The desk review will include orientation interviews with the project team, the donor, and key partners.
- Examining the intervention's Theory of Change, with particular attention to the identification of assumptions, risk and mitigation strategies, and the logical connect between levels of results and their alignment with ILO's strategic objectives and outcomes at the national levels, as well as with the relevant SDGs and related targets. If TOC does not exist, the evaluator should reconstruct it.
- Interviews with key informants (tripartite constituents ILO project team, technical specialists and relevant staff, representative of the SSO, Min of Labour, and other key stakeholders)
- Stakeholders workshop - as part critical reflection process, the evaluator(s) will present the findings and key recommendations. They will be validated by the key stakeholders; dissemination workshop may be organized to share the final report and findings

The evaluation must be conducted with gender equality as a mainstreamed approach and concern. This implies (i) applying gender analysis by involving both men and women in consultation and evaluation's analysis; (ii) inclusion of data disaggregated by sex and gender in the analysis and justification of project documents; (iii) the formulation and/or analysis of gender-sensitive strategies and objectives and gender-specific indicators; (iv) inclusion of qualitative methods and utilization of a mix of methodologies; (v) forming a gender-balanced team, and (vi) assessing outcomes to improve lives of women and men. Thus, analysis of gender-related concerns will be based on the [ILO Guidance Note 3.1: Integrating Gender Equality in Monitoring and Evaluation, and the Supplementary Guidance Note: integrating gender equality in ILO M&E \(Nov. 2023\)](#).

Stakeholder participation

Stakeholders have been identified based on their role in the project. Stakeholders are not only key informants, but they need to be meaningfully engaged in the process to be able to express their beliefs on an equal footing. These fundamental power dynamics amongst stakeholders must be recognized in the process and ways for engaging meaningful stakeholder participation should be proposed by the evaluation team. The evaluation proposal should propose ways in which various stakeholders will be engaged, ensuring that representatives of the most marginalized or groups in vulnerable situation are able to participate throughout the evaluation process.

6. Expected Outputs

Deliverable 1: Inception Report and workplan (not more than 15 pages excluding annexes)

The Inception Report will include the details on how the evaluator understands what is being evaluated including the evaluation questions. The inception report must elaborate the methodology being proposed in the TOR, with changes if applicable, including proposed methods, data sources, and data collection procedures. The report shall also include selection criteria or sampling methodology for the selection of individuals for interviews or group discussions and list of stakeholders that will be included in the evaluation. A detailed timeline / workplan along with a detailed methodology should clearly state the limitations of the chosen evaluation matrix methods, including those related to representation of specific group of stakeholders. A detailed timeline / workplan will also be part of the inception report.

Deliverable 2: Debriefing and National Stakeholders consultation workshop (PowerPoint presentation to be submitted by the evaluator and delivered during a face-to-face workshop or online meeting, PPT to be translated into Thai as well)

A debriefing to ILO and a national stakeholders workshop will be organized for the evaluator to share and validate the findings. The Evaluation Manager will coordinate with the Project team for the list of stakeholders for the workshop/online meeting. On this activity, the evaluator will present the initial findings to validate information and data collected through the various data collection methods.

Deliverable 3: A first draft of the evaluation report (not more than 35 pages excluding annex) The draft evaluation report will have to be written in English and should adequately cover the evaluation criteria and questions as finalised in the inception report, along with the recommendations, lessons learned, good practices, technical recommendations for the key stakeholders. The draft evaluation report should be in the format of the ILO https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746808.pdf

Deliverable 4: Final Evaluation Report including an Evaluation Summary in standard ILO format (not more than 35 pages excluding executive summary and annexes) The final evaluation report will be submitted to the evaluation manager. The Evaluation Manager has to ensure that all comments from the Project team and the Project's key stakeholders are addressed and integrated. If not, written justifications for not incorporating

them will be required. The Report’s annexes shall include the TOR, evaluation matrix, tools used during data collection, field work schedule, a list of interviewees, list of documents analysed, lessons learned template and emerging good practices in standard ILO template.

The quality of the report will be determined based on quality standards defined by the ILO Evaluation Office as per Checklist 4.9 Rating of an Evaluation Report [wcms_746818.pdf \(ilo.org\)](https://www.ilo.org/wcmsp5/groups/public/-/dms/upload/wcms_746818.pdf)

The report and all other outputs of this evaluation must be produced in English. All draft and final reports, including other supporting documents, analytical reports and raw data should be provided in electronic version compatible with Microsoft Word for Windows. The approval of the final evaluation report might take a couple of weeks as it must proceed through three ILO internal control layers (evaluation manager, regional evaluation office, and ILO Evaluation Office -Geneva).

7. Evaluation Management and Resources

Evaluation Management

An ILO Regional Evaluation Officer based at ILO Regional Office for Asia and the Pacific will manage and lead the evaluation process in consultation with the Project CTA, the National Project Coordinator and representatives of SSO. Evaluation Manager/Regional Evaluation Officer provides oversight of the evaluation process ensuring the process and report meets UNEG quality standards.

The evaluation manager develops the ToRs in consultation with key stakeholders. The evaluator(s) reports to ILO evaluation manager. Evaluation manager has overall day to day supervision of the evaluator’s work and sharing of the Evaluator’s deliverables for review by key stakeholders.

Evaluator(s)

The evaluation will be conducted by a team of independent evaluators (Team leader and national evaluator as team member) with strong evaluation experience and RBM expertise. Social protection expertise will be an advantage. The responsibilities and profile of the “evaluation team” can be found below. The project will provide support in contacting key stakeholders.

Responsibilities and Profile of the Team Leader

Responsibilities	Profile
<ul style="list-style-type: none"> • Defining roles and responsibilities of the team leaders guiding and managing the team throughout the evaluation phases and ensuring quality control and adherence to ethical guidelines; • Defining the methodological approach. Producing and delivering the inception powerpoint. Drafting the inception report (including all data collection tools), producing the preliminary findings presentation, draft reports and drafting and presenting a final report; • Providing any technical and methodological advice necessary for this evaluation; • Ensuring the quality of data (validity, reliability, consistency and accuracy) throughout the analytical and reporting phases. • Ensuring the evaluation is conducted per TORs, 	<ul style="list-style-type: none"> • Post graduate degree in a field of relevance to the evaluation (Economics, Actuarial Science, or other related Political/Social Science degree), and have specific experience in the field of evaluation • Contextual knowledge of the UN and in particularly the ILO and Thailand context • At least 10 year experience in evaluation of UN projects and programmes and experience in leading evaluations • Demonstrated knowledge and expertise of social protection and social security will be an advantage; • Demonstrated knowledge and experience on gender issues, including gender

Responsibilities	Profile
<p>including following ILO EVAL guidelines, methodology and formatting requirements.</p> <ul style="list-style-type: none"> • Adhering to evaluation report quality standards • Liaising with the evaluation managers and representing the evaluation team in meetings with stakeholders; • Contributing to the report dissemination and communication by participating in webinars and supporting or providing inputs to evaluation communication products. • Ensure that all key stakeholders are consulted and have the chance to provide their inputs during the evaluation process 	<p>mainstreaming</p> <ul style="list-style-type: none"> • Expertise in qualitative and quantitative evaluation methods and an understanding of issues related to validity and reliability; • Fluency in spoken and written English,

Responsibility and Profile of a team member (nationals of Thailand)

Responsibilities	Profile
<ul style="list-style-type: none"> • Provide context specific and technical (particularly on Thailand-related social protection aspects) and methodological advice necessary to the team leader • Support the evaluation team leader throughout the evaluation process (inception, data collection, data analysis, and report writing); • Represent the evaluation team in meetings/interviews/focus group discussions with stakeholders; • Ensure that all key stakeholders are consulted • Contribute to the report drafting, dissemination and communication by participating in webinar and supporting or providing inputs to evaluation communication products. • Provide interpretation as required including translation of PowerPoint presentation to Thai 	<ul style="list-style-type: none"> • Postgraduate degree in a field of relevance to the evaluation (Economics, Actuarial Science, Gender, Political Science, Anthropology, or other Social Science degree) • Expertise and experience in social protection and gender mainstreaming will be an asset. • 3 years experience in conducting evaluation of UN projects/programmes • Expertise in qualitative and quantitative research • Fluency in spoken and written English and Thai

The project team will be consulted throughout the evaluation process and they will facilitate inputs to first and secondary data collection. They will provide all relevant documents and support the logistics needed by the evaluation team. ILO team will provide the necessary budget required for this evaluation and will issue contracts for the evaluation team.

Resource: the project will cover the cost of the evaluation as follows:-

- ✓ professional fee: Proposed professional fee's terms of payment:-
 - 20% upon the approval of the inception report;
 - 50% upon submission of the quality draft evaluation report as per agreed ToR/inception report and ILO evaluation report checklist
 - 30% upon the approval of the final evaluation report by ILO Evaluation Office
- ✓ travel and DSA where relevant and applicable

8. Evaluation Workplan

It is estimated that the scope of effort required by the evaluation team will be approximately 20

days for the international consultant /team leader and approximately 20 days for the national consultant. The successful evaluation consultants will be remunerated on an output-based total fee.

Task	Responsible Person	Time Frame	Team leader – Number of Workdays	National consultant - Number of Workdays
TOR finalisation in consultation with key stakeholders	Evaluation Manager	End of April 2024		
Call for proposals and selection of evaluator		May 2024		
Briefing evaluation team and inception report finalization	EM and Evaluators	By end of May 2024	3	3
Data collection and debriefing	Evaluators	Mid-end June 2024	7	10
Draft report submission	Evaluators	By mid July	7	4
Stakeholders consultation workshop		TBC	1	1
Review and provide feedback/comments on evaluation report	Project and stakeholders	By end of July 2024		
Finalization of report	Evaluator	By mid Aug 2024	2	1
Approve the final evaluation report	EVAL	By end of Aug 2024		

9. Legal, Ethical matters and code of conduct

The evaluation will comply with UN Norms and Standards. The evaluator will abide by the [EVAL's Code of Conduct](#) for carrying out the evaluations. UN Evaluation Group (UNEG) ethical guidelines will be followed. The evaluator should not have any links to Project management, or any other conflict of interest that would interfere with the independence of the evaluation.

Evaluators should have personal and professional integrity and abide by the [UNEG Ethical Guidelines](#) for evaluation and the Code of Conduct for Evaluation in the UN system to ensure that the rights of individuals involved in an evaluation are respected. Evaluators must act with cultural sensitivity and pay particular attention to protocols, codes and recommendations that may be relevant to their interactions with women, girls and boys. Evaluators will be expected to sign the respective ILO Code of Conduct to show that they have read and understood the UNEG Code of Conduct for Evaluation in the UN System process.

Ethical considerations will be considered in the evaluation process. As requested by the UNEG Norms and Standards, the evaluator(s) will be sensitive to beliefs, manners and customs, and act with integrity and honesty in relationships with all the stakeholders. The evaluator(s) shall respect the people's right

to provide information in confidence and make participants aware of the scope and limits of confidentiality while ensuring that sensitive information cannot be traced to its source.

Ownership of data from the evaluation rests jointly with the ILO and the consultant. The copyright of the evaluation report will rest exclusively with the ILO. The use of data for publication and other presentations can only be made with the written agreement of the ILO. Key stakeholders can make appropriate use of the evaluation report in line with the original purpose and with appropriate acknowledgment.

All deliverables will be paid for on satisfactory completion and certification by the ILO evaluation manager and in line with the ILO Evaluation report checklist.

Annex1

1. Relevant ILO guidelines on Development Project Evaluation/ Website EVAL portal on managing and conducting evaluation (all guidance notes, checklist, templates, etc.)
https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_853289.pdf
2. ILO Policy Guidelines for results-based evaluation, 2020
https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_571339.pdf
3. Implications of COVID-19 on evaluations in the ILO: Practical tips on adapting to the situation
https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_744068.pdf
4. SDG related materials <http://www.ilo.ch/eval/eval-and-sdgs/lang--en/index.htm>
5. Decent Work Country Programme (DWCP) for Thailand
6. Code of conduct for evaluation/ Code of conduct form (To be signed by the evaluators)
http://www.ilo.org/eval/Evaluationguidance/WCMS_206205/lang--en/index.htm
7. ILO EVAL Gender [Guidance Note 3.1 on integrating gender equality and non-discrimination](#)
8. ILO EVAL Social Dialogue [Guidance Note 3.2 on Integrating social dialogue and ILS in monitoring and evaluation of projects](#)
9. Protocol to collect evidence on ILO response to COVID-19
https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_757541.pdf
10. UNEG Ethical Guidelines for Evaluation
<http://www.unevaluation.org/document/download/548>
11. Writing the inception report https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746817.pdf
12. Checklist 4.3: Data collection method https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746722.pdf
13. Checklist 4.1: Validating methodology https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746807.pdf
14. Checklist 4.2: Preparing the evaluation report https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746808.pdf
15. Checklist 4.9 Rating the quality of evaluation reports
https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746818.pdf
16. Guidance Note 4.5: Stakeholders engagement https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---eval/documents/publication/wcms_746724.pdf

Appendix 5. List of persons interviewed

Name	Role
Project team	
Simon Brimblecombe	CTA
Sasachol Kruawan	National Project Co-ordinator
Social Security Office	
Ms. Nuntinee Sapsiri	Advisor to Secretary General of Social Security Office
Mr. Krittapat Karutkul	Inspector General
Mr Nakarin Pinpathomrat	Director of R&D Department
Mr Tanit Loipimai	Minister Counsellor
Ms Chompoopen Sirithorn	Director of Policy and planning division (former lead coordinator)
Mr Napoom Suwannapoom	Head of Actuarial Group (lead coordinator)
Ms Kornrawan Ierttantana	Actuary, R&D Department
Ms Supaporn Youngyeun	Head of Statistics Group, R&D Department
Ms Phunyapha Mongkol	Head of Research Group R&D Department
Ms Sunai Nitungkorn	Investment bureau
Ms Varatsuda Saradatta	International Affairs Department
Mr Supakorn Loychusak	International Affairs Department
Ms. Supaporn Purenim	Human Resource Department
Mr Suwit Sripijan	Employer representative
Mr Tawee Deeying	Employee representative
Ms Siriwan Romchatthong	ECOT
External collaborators	
Dr. Nada Wasi	Counterpart for joint pension reform activities
Dr. Suphannada Lowhachai	Director of Social Data-based and Indicator Development Division of NESDC
ILO	
Ms. Xiaoyan QIAN (TBC)	Director - Decent Work Technical Team and Country Office for Thailand, Lao PDR and Cambodia
Mr. Nuno Meira Simoes CUNHA	Senior Technical Specialist on Labour Market Institution, INWORK. Previously Specialist on social protection with DWT-Bangkok.
Mr. Kenichi Hirose	Senior Technical Specialist on Social Protection, DWT-Bangkok
Ms. Jittima Srisuknam	Programme Officer - ILO Country Office for Thailand, Lao PDR and Cambodia

A Summary of Gender Composition of Interviewed Representatives from Each Organization

Organization	Total Participants	Male Participants	Female Participants
ILO	6	3	3
SSO	13	5	8
Social Partner	3	2	1
External collaborators	2	0	2
Total	24	10	14

Appendix 6. Documents consulted

Project documents

PRODOC

Progress Reports to June 2023

[We have also consulted a range of internal project documents which are not specifically listed here].

National documents

12th National Economic and Social Development Plan (2017-22)

13th National Economic and Social Development Plan (2023-27)

Thailand's 20-Year National Strategy (2018-2037)

ILO/UN documents

ILO Programme and Budget

Review of the Pension System in Thailand

Thailand Decent Work Country Programme (DWCP) 2019-2021 and 2023-27

Asia-Pacific Employment and Social Outlook 2024: Promoting decent work and social justice to manage ageing societies

[We have also consulted a range of ILO evaluation materials which are not specifically listed here (see ToRs)].

Documents from other development partners

World Bank, *Pension Provision in Thailand*, 2021