

SOCIEUX+

EU expertise on social protection,
labour and employment

GUIDE FOR EXPERTS

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SOCIEUX+ is implemented by

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About SOCIEUX+

The European Union (EU) promotes and maintains dialogue on social protection and inclusive employment policies with an increasing number of partner countries. This effort has been confirmed in the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development Our World, our Dignity, our Future". A significant number of cooperation activities in different countries related to these fields are funded by geographic or thematic instruments. However, a gap had been observed in the EU cooperation with third countries with regard to providing support to short-term measures and peer-to-peer cooperation to promote the development of social protection.

SOCIEUX+ - EU Expertise on Social Protection, Labour and Employment is a technical assistance facility set-up and co-funded by the EU (through the EC's Directorate for Development and Cooperation - EuropeAid), France, Spain and Belgium and implemented by a partnership composed of four partners: Expertise France, leader of the implementation Partnership, the Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP), Belgian International Cooperation on Social Protection (BELINCOSOC) and Belgium Technical Cooperation (BTC).

The general objective of the facility is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries.

The specific objective is to enhance the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through peer-to-peer short-term technical assistance and knowledge development.

SOCIEUX+ supports the efforts of Partner Countries (PCs) of the EU in the reform, development and extension of their social protection systems and the strengthening of labour & employment policies. The Facility aims at enhancing the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through peer-to-peer short-term technical assistance and knowledge development. SOCIEUX+:

- Recognises the impact of social protection and employment in reducing poverty and vulnerability;
- Supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems;
- Complements the efforts made through other European Union initiatives.

SOCIEUX+ makes European expertise quickly available with minimal transaction costs for partner institutions. It draws on the expertise of public or mandated bodies, non-governmental organisations, and relevant civil-society organisations of EU Member States and international specialised organisations. It can also support South-South and triangular cooperation through the mobilisation of practitioners from partner countries. SOCIEUX+ is operational since September 2016.

The Facility is an expansion of SOCIEUX - Social Protection European Union Expertise in Development Cooperation -, which was established in 2013 and progressively incorporated.

Purpose of this guide

The **Guide for Experts** provides information about the SOCIEUX+, about the role of experts within SOCIEUX+ technical assistance Actions, as well as the financial entitlements of experts and logistical arrangements offered by the Facility. It is addressed to focal points and potential experts in different organisations collaborating with SOCIEUX+.

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Definitions and Acronyms

Term/acronym	Definition
Action	Short-term interventions prepared and implemented as a response to specific requests and needs within partner institutions/partner countries. An action is composed in general of several inter-connected activities.
Activity	A technical assistance measure that in part of an action.
(Private) Expert	Private consultant
(Public) Expert	Practitioners (including retired expert) from public administrations and mandated bodies, and from international organisations, academia, social partners, civil society.
FAA	A Fixed Additional Allowance (FAA) is a compensation to public experts or their institution of origin per working-day and effective travel-day to public experts (including retired expert), the legal framework in their residency country allowing.
Fees	Remuneration of private and independent expert are on the basis of a daily rate set according to the number of years of relevant professional experience.
Mission	Delivering of services or attending to an event in the framework of actions/activities, which takes place outside the normal place of posting of the expert.
Partner Country	An eligible country in which SOCIEUX+ collaborates with a local institution through the mobilisation of technical assistance.
Partner Institution	A public or mandated institution in a partner country for which SOCIEUX+ mobilise expertise in the framework of a technical assistance action.
Per diem	A daily lump sum allowance/compensation intended to cover travel costs incurred by mobilised experts during the activity/mission/event, such as accommodation costs, meals, local transportation and sundry expenses.
Technical Assistance	Non-financial assistance provided by experts/specialists/practitioners in a given technical area. It can take the form, among others, of sharing information and expertise, skills training, working knowledge transfer and may also involve the transfer of technical data.
ToREx	Terms of reference for experts (ToREx) describe the objectives, the rationale, the area and nature of the requested assistance, the field and level of expertise required, the provisional time schedule as well as the results to be achieved and the activities to be implemented.

1 WHAT IS SOCIEUX+?

SOCIEUX+ in a nutshell

SOCIEUX+, EU Expertise on Social Protection, Labour and Employment is a technical assistance facility set up to improve the capacities of partner countries to design and manage inclusive, effective, and sustainable labour and employment policies and social protection systems. SOCIEUX+ provides access to short-term high-quality European expertise from peers to peers. It draws primarily on the expertise of public or mandated bodies of EU Member States, as well as of relevant civil-society organisations and international specialised organisations. It can also support South-South and triangular cooperation through the mobilisation of practitioners from partner countries.

This technical assistance is provided by SOCIEUX+ in the framework of an SOCIEUX+ Action.

SOCIEUX+ Actions

SOCIEUX+ Actions are micro-projects implemented through short-term technical assistance interventions. These actions take the form of in general several short-term *activities* addressing needs and/or shortcomings on the areas covered by the SOCIEUX+ scope of work.

Actions can address structural or institutional shortcomings, or be ad hoc know-how and technical assistance to strengthen existing capacities or respond to punctual needs, including:

- Gaps and needs assessment for capacity building;
- Design of capacity building and development measures;
- Sector and functional analysis (and recommendations);
- Systems design and policy formulation;
- Legal and regulative framework reviews and formulation;
- Strategic planning support;
- Data and information management and processing; and,
- Other relevant interventions in line with the specific objectives of SOCIEUX+.

SOCIEUX+ is geared towards activities that take place within the partner country, although measures such as remote support and study visits to third countries can also be considered in justified cases. Onsite activities are implemented through short-term missions of 1 to 3 weeks carried out in general by a team of two mobilised experts from different EU Member States or institutions.

In practice, **SOCIEUX+ activities** may take such different forms as:

- Expert advice and consulting on specific technical issues;
- Screening and reviews of documents/programmes;
- Expert support in drafting legislation/strategies; and
- “Train-the-trainers” seminars;
- Technical trainings;
- Fact-finding/assessment missions;
- Roundtable discussions;
- Thematic workshops; and,
- Any other type of measure that can be provided through short-term peer-to-peer exchange.

No financing or purchasing of equipment or infrastructures is possible in the framework of SOCIEUX+.

SOCIEUX+ Partner countries and institutions

Actions can be implemented in the 145 eligible Partner Countries covered by the EU development and cooperation instruments in:

- Latin America, Asia (including Central Asia), and the Middle East;
- African, Caribbean and Pacific;
- European Neighbourhood.

SOCIEUX+ Actions target and benefit public or mandated institution in Partner Country by making expertise of excellence available for short-term technical assistance activities. Those Partner Institution are public authorities and mandated bodies (national and local) with responsibilities in the field of social protection, labour and employment in charge of social protection.

SOCIEUX+ Areas of technical assistance

In principle, almost all policies and measures in the context of social protection, labour and employment, aiming at alleviating poverty, reducing vulnerability as well as providing income security and access to essential services and job opportunities could be supported through individual actions.

Labour and employment

SOCIEUX+ focuses its efforts in the area of labour & employment on supporting eligible partner institutions, in particular ministries of labour and related agencies, in low and middle-income countries which face serious challenges in the design and implementation of effective employment strategies and labour market policies, such as, but not limited to:

- Comprehensive employment strategies across the various policy areas;
- Labour market information systems and other intelligence and operational research;
- Active and passive labour market policies;
- Compliance with international labour standards;
- Informal labour and its economic transition policies and strategies;
- Employment of migrant populations;
- Vocational education and training and skills development;
- Labour intensive public work programmes;
- Labour market intermediation;
- Inclusive labour markets; and
- Social dialogue.

Social protection

SOCIEUX+ addresses main challenges in Partner Countries on the design and operationalisation of social protection systems and programmes that have better coverage, more equitable and inclusive, efficient, appropriate, and fiscally feasible and sustainable. The Facility favours support to eligible Partner Institutions in low and middle-income countries. Such support covers, but is not limited to:

- Legal and institutional framework for the provision of effective and efficient social protection coverage;
- Individual and organisational capacities for policy-making;
- Capacity building for social protection programmes, systems and policy implementation;
- Advocacy and capacity building for mainstreaming and cross-sectorial policies and issues related to social protection;
- Advocacy and capacity building for sustainability of domestically funded social protection systems and programmes;
- Portability of social benefits and rights at national and regional levels;
- Social protection coverage and inclusion of migrant workers and their dependents; and,
- Empowering of civil society and social partners on social protection.

2 HOW TO WORK WITH SOCIEUX+

SOCIEUX+ technical assistance is based on the contributions of qualified and committed experts who deliver concrete outputs and share prior experience with their peers in Partner Countries.

SOCIEUX+ Mobilised experts

SOCIEUX+ preferably contracts public experts and practitioners from EU Member States' public administrations and mandated bodies. In order to facilitate triangular cooperation, experts from public administrations of Partner Countries may also be mobilised. In addition, when required, experts from other types of organisations, such as international organisations, academia, social partners, and civil society can be involved in SOCIEUX+ Actions. These categories are assimilated to public experts for all purposes and financial compensations.

Private consultants are only recruited in cases where no public expert can be identified by the FMT and when it is justified regarding the competences of the consultant in very specific services and areas of expertise.

Participating in SOCIEUX+ is an opportunity for the expert to:

- Network, learn and gain or increase international experience;
- Acquire knowledge and improve skills through peer-to-peer interaction;
- Gather new ideas and inputs from different cultures and perspectives as an inspiration to look "outside-inside";
- Acquire first-hand experience of social protection, labour and employment systems abroad and contribute to enhancing cooperation between the EU and Partner countries.

SOCIEUX+ Collaborative institutions

In alternative to an individual expert mobilisation, SOCIEUX+ also aims at setting up strategic partnerships with Collaborative Institutions. These are public or mandated institutions EU Member States' public administrations or mandated bodies with expertise of excellence in the areas of technical assistance covered by SOCIEUX+. Experts mobilised from Collaborative institutions are in general contracted through their institution of origin unless otherwise agreed.

Collaborative Institutions can benefit from joining the efforts of SOCIEUX+ by

- Strengthen their European and international profile;
- Acquiring international exposure;
- Triggering new institutional partnerships; and,
- Improve the capacities and international experience of own staff.

SOCIEUX+ Expertise mobilisation

Calls for applications

Individual opportunities to participate as expert in a SOCIEUX+ Activity are regularly published on the SOCIEUX+, its Implementation Partners (Expertise France, FIIAPP and BELINCOSOC) and other relevant websites. Experts may directly apply but interested institutions wishing to make experts available as Collaborative Institutions are also invited to contact SOCIEUX+. Experts may also be recommended and invited to apply through the SOCIEUX+ network of focal points across EU Member States' institutions

Experts with relevant profiles and already registered in the SOCIEUX+ Expert Database directly receive an invitation to apply to mobilisation opportunities.

Experts from Collaborative Institutions with appropriate profiles may directly be mobilised without publication of calls for applications.

Calls for applications include succinct information on:

- The title of the action and activity to be implemented;
- The identification of the Partner Country and Institution;
- The estimated workload for experts;

- The deadline for application;
- The expected tasks and deliverables;
- The qualifications of applicants (expert profile); and,
- The application information required.

Apply to a mobilisation opportunity

Individual experts interested in participating in a SOCIEUX+ Activity advertised through a call for application may apply upon registration of their profile in the SOCIEUX+ Expert Database at www.pmt.socieux.eu. After, registration in the database experts may apply to a call by completing and submitting a *signed Declaration of Availability* which can be downloaded from the webpage of the call for application. Expression of interests are to be submitted by email to Experts@socieux.eu with the reference of the call for application.

Collaborative or interested institutions wishing to make expertise available for a specific call for application may directly contact the team of SOCIEUX+ at contact@socieux.eu.

Terms of Reference for Experts

Expert's profile with required skills and expertise required for the implementation of a SOCIEUX+ activity are described and duly expressed in the Terms of Reference for Experts (ToREx). The ToREx describe in detail what is expected from mobilised experts, and include at least:

- Description of results of previous activities and the stand of situation of the action;
- Details of expected tasks;
- Detailed profiles of individual experts and/or collaborative institutions required for the implementation of the activities;
- Respective responsibilities of each expert to be mobilised;
- Detailed estimated workloads including preparation, travel, mission, reporting and, if applicable distance working-days per expert (see below);
- Detailed intermediary and final deliverables, their format;
- Reporting rules including delays for the submission of deliverables; and,
- An indicative time schedule.

The ToREx are part of the contractual agreement between SOCIEUX+ and the expert, or its organisation of origin.

Selection process of experts

Experts are selected based on their skills and expertise against the ToREx of the activity for which they are to be mobilised for. Among others, the respective area and language skills. Other advantages would be to have had a previous experience in providing technical assistance in an international context and a previous experience in the Partner Country or its geographical region.

Experts are selected in a non-discriminatory and transparent procedure, making use of EU standards in selection procedures.

3 CONTRACTUAL AND FINANCIAL CONSIDERATIONS

Contracting

SOCIEUX+ contracts selected experts using its own standard contracts and the annexed ToREx. Contract are concluded either with the experts and/or with their organisation of origin (employing institution). The latter being preferred to ensure any compliance with national rules on secondary or external activities (remunerated or not) of public employees and civil servants. Experts to be contracted through their organisation of origin (or collaborative institutions) may not be replaced, i.e. the organisation may not propose another expert in case during the implementation of the activity; contractual provisions for this are included in SOCIEUX+ standard contracts. If the services provided by the expert are contracted through a third-party (organisation of origin, collaborative institution, consulting company or other), a service Contract is concluded with this.

Financial compensations

Public experts (active and retired)

A Fixed Additional Allowance (FAA) of €250 is granted per working day and effective travel day to the following categories of experts contracted to undertake SOCIEUX Activities: experts from public administrations and mandated bodies of EU Member States and Partner countries **(including retired staff)**, international organisations, academia and civil society¹. If the services provided by the expert are contracted through a third-party (organisation of origin, collaborative institution, consulting company or other), the FAA is directly paid to the organisation.

National legislations on remunerations and compensations of public employees and civil servants are to be applied. The responsibility of compliance and verification lies however with the individual experts.

Experts belonging to the staff of the Partner Institute benefiting from an action not entitled to financial allowances if their organisation is the beneficiary of the action.

Private experts

Private and independent consultants contracted to undertake SOCIEUX Activities are entitled to receive a fee per working and effective travel day. Private expert has to specify in the contract her/his Registration number in the national register of companies.

Logistics and other financial provisions

Travelling time and Home-working

If the expert is travelling on a mission outside the expert's place of posting, the time spent travelling (including during weekends) can be considered as working time up to a maximum of 2 working days per journey and can be included in the time-sheet and invoiced if provided for by the Terms of Reference for Experts and the contract. The time spent travelling other than for a direct assignment (e.g. departure on Saturday for an assignment on Monday) is not considered as working time and must not be invoiced unless it can be demonstrated that it is the most economical option.

Activities may include or totally consist of backstopping of interventions and work of the Partner Institute. Such work is considered as distance working and handled as homeworking, if explicitly foreseen in the ToREx and are remunerated or compensated under the standard contractual and financial rules of SOCIEUX+.

Per diem and Accommodation

Experts contracted under the SOCIEUX+ and other eligible travellers are entitled to receive a per diem for each overnight spent outside their normal place of posting. Travel time does not entitle the allocation of per diems.

The per diem is an allowance/compensation intended to cover accommodation costs, meals, local travel and sundry expenses (such as private telephone calls, minibar and other personal expenses) at the location and during the period of the activity.

Experts are provided with suggestions for hotels, the booking and payment of which is the responsibility of the expert him/herself.

The quantity of per diem is determined on the basis of the travel schedule and justified by boarding passes.

The exact per diem rate will be fixed in the contract. Any per diem to be paid must not exceed the European per diem rates published on the website:

http://ec.europa.eu/europeaid/work/procedures/implementation/per_diems/index_en.htm_en

¹ Experts deployed to Partner Countries where the weekly working days are Sunday to Thursday are entitled to receive an FAA for Sunday only if required to work on that day.

Advance on travel costs

A per diem advance of 75% could be paid to the expert before the start of field mission and upon reception of the scanned version of the signed contract when applicable by email, the mission/travel order and flights booking. The balance of per diem is paid after the end of the activity and upon reception of the original boarding passes or other additional documents for missions not requiring travel by air and the time sheet signed by the expert.

Other eligible costs of travel are paid upon request after the end of the activity providing the expense statement template. Not sufficiently documented expenses may not be reimbursed. The form shall be submitted as an attachment to the final invoice of the Expert.

An advance of per diem is deemed reimbursable by the traveller in case of cancellation of the activity and are cleared against final documentation and payment of residual contract amounts.

International travel*Transportation by plane*

Experts attending an activity abroad are entitled to have their international travel arranged and paid for. Flight tickets are booked on the basis of the economy class fare. Boarding passes must be retained and submitted to the SOCIEUX+ team in original.

If an airline makes an additional charge for Activity-related checked-in luggage (e.g. training materials), the corresponding amount can, with the prior agreement of the SOCIEUX+ team, be reimbursed to Experts upon presentation of supporting documents in original.

Costs for inter-city journeys in the country where the activity takes place as well as inter-city travel costs in the home country linked to international travel will be reimbursed upon submission of a proper invoice and supporting documents as outlined below.

Experts whose travel time to an international airport exceeds 24 hours are entitled to receive a corresponding *per diem* to cover their travelling and accommodation costs to and from that airport.

Transportation by train

A "second class" ticket shall be reimbursed, except for trips in PCs where the booking should be done for "first class".

For high-speed trains, also "first class" tickets may be reimbursed, if proof is provided that this option was more economic than "second class" standard ticket (possibly because the expert owns a season ticket which provides access to low rates tickets).

Professional class tickets could be preferable when avoiding penalties for changes or cancellations.

Other travel related issues

Visas and vaccination

Experts who need a visa are responsible for obtaining it themselves. The SOCIEUX+ team will, however, assist Experts by providing useful information regarding visa procedures and by coordinating the preparation and delivery of an invitation letter by the partner institution. Visa costs will be reimbursed to Experts upon request in the *Other incurred expenses* (annex 4 to the contract) and provision of an invoice (annex 3 to the contract).

Travelers are also encouraged to have their vaccinations/immunisations up-to-date for their journey and stay/mission. The costs for vaccinations specifically required for a stay in the PC are supported by SOCIEUX+ upon pre-request and provision of supporting documents.

Travel Insurance

The insurance for travelers abroad is provided by Expertise France through its insurance brokerage for repatriation insurance and emergency medical expenses. The detailed insurance terms and conditions will be submitted to travelers with their plane tickets.

Local transportation

Taxi fares **linked to international travel** may be reimbursed on the basis of payment evidence and with prior approval of SOCIEUX+Team, in the following cases:

- To and from airports/bus stations/train stations, if no public transport is available;
- The time of travelling to and from the airports/bus stations/train stations put the safety of the traveller at risk. In these cases, the prior agreement from the Finance and contract officer of SOCIEUX+ should be obtained whenever possible;
- Arrival at airports/bus stations/train stations before 8 a.m. and after 10 p.m.

All other costs of local transportation are covered by per diems.

Payment procedures

Currency of payment

- The expert covers its own banking fees.
- All payments shall be made in Euro.
- Any expenses incurred in another currency shall be reimbursed at the exchange rate specified in INFOEURO at:
- http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/infoeuro_en.cfm published monthly by the European Commission, for the corresponding month.

Fixed Additional Allowances and Fees

Payments to the expert or their institution of origin are only made on the basis of a signed contract (see section 2.4).

All payments related to FAAs and/or fees are subject to the verification of performance (see section 2.5). From the approval by the Facility Management Team of the expert's mission report and corresponding working papers as foreseen in the ToREx, the expert will send his/her an appropriate invoice.

The FAA or fees due for the services requested through the ToREx shall be paid by bank transfer to the Contractor only and directly. The transfers shall be ordered within 30 days after receipt of the original signed invoices (see annex 3 to the contract) and supporting documentation including a duly signed time sheet (annex 2 to the contract) by the expert and the Finance and Contract Officer setting out the services actually rendered and expense statement (see annex 4 to the contract).

All payments shall be made subject to the acceptance of the work results by SOCIEUX+ Team. If the expert's performance is rejected in part or in whole, he/she commits his/herself to amend his/her performance/report according to the specifications and within a timeframe given by the SOCIEUX+ Team without being entitled to any further payment than that already invoiced upon delivery of the respective services/reports.