



EU expertise on social protection,
labour and employment

GUIDE FOR PARTNER COUNTRY INSTITUTIONS

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SOCIEX+ is implemented by

Partnership led by:



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 Expert Facility on Employment, Labour and Social Protection 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 the Guide

The Guide for Partner Institutions provides information about SOCIEUX+. It covers the following aspects of the program:

- the functioning of the facility;
- the facility's scope of intervention in the fields of social protection, labour and employment;
- the different types of possible interventions;
- the application submission process that partner institutions (PIs) need to follow in order to request assistance under SOCIEUX+;
- the financial and logistical aspects of the organisation of Actions and Activities.

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Definition 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 <i>public experts</i> 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 <i>private and independent expert</i> 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 Expert Facility on Employment, Labour and Social Protection, 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 (see Annex 1 for list for the full list of countries):

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

SOCIEUX+ Actions target and cooperate with 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+ targets **public authorities and mandated bodies** in charge of social protection, labour and employment at a national and local level in partner countries. More precisely, the following public and semi-public sector bodies are considered eligible: central governments, ministries, legislative councils and regional governments, mandated bodies, other institutions responsible for the implementation or provision of social protection, labour and employment. These partner institutions should have responsibilities in the fields covered by the scope of work of the SOCIEUX+.

The Facility can also cooperate with **social partners** engaged in social dialogue influencing the political and development agenda of SOCIEUX+ scope of work such as trade unions, employers' and workers' organisations and association bodies, umbrella organisations, and others. These stakeholders should also be considered in the implementation of actions that benefit other partner institutions whenever relevant to ensure the completion and sustainability of the objectives of the actions.

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.
- Where do activities take place?

SOCIEUX+ Cooperation principles

All actions and their activities are based on the principles of:

- Ownership – requests and actions are driven by the demand and needs of Partner Institutions;
- Peer-to-peer dimension – implemented activities are based on peer-to-peer approaches between institutions, experts and practitioners;
- Public expertise preference – mobilised experts are mainly and preferably from public or mandated EU Member States' ministries and agencies;
- Diversification of expertise – mobilised experts and collaborative institutions providing expertise are as far as possible from more than one country;
- Institutional collaboration – actions should foster institutional cooperation between EU Member States and Partner Countries institutions;
- Structured approach – activities of structural action (with more than one activity) are articulated and all contribute to the specific objective of the action;
- “South-South” and triangular cooperation – actions and activities may enable cooperation between two or more Partner Countries, and/or between Partner Countries and EU Member States institutions;
- No-overlap – actions should not overlap but complement and create synergies with existing cooperation programmes financed by the EU or other relevant international partners;
- Results-based management – activities are managed in a fast, appropriate and pragmatic way towards the achievement of actions’ set-results; and,
- High quality – deliverables of activities meet high standards of quality but still under cost-effectivity constraints.

Expertise mobilised

SOCIEUX+ engages experts drawn primarily from **public administrations of the European Union Member States** so as to facilitate the sharing of knowledge and experience on a peer-to-peer basis. Practitioners from partner countries’ administrations and mandated bodies can also bring added value in **triangular cooperation**.

When required, experts from other organisations, such as international organisations, academia, civil society and private consultants may be involved in SOCIEUX+’s Actions.

2 HOW DOES SOCIEUX+ WORK

SOCIEUX+ is a demand-driven facility where institutions from partner countries submit requests in a simple format. The SOCIEUX+ Team then fine-tunes the request in collaboration with the requesting Partner Institution to ensure a tailored and well-defined technical cooperation.



HOW TO APPLY

Interested Partner Country Institutions are invited to apply for SOCIEUX+ technical assistance following the guidelines presented below:

1. The **Request Form** can be downloaded from the SOCIEUX+ [website](#). If you experience difficulty downloading the Request Form, please contact the SOCIEUX+ team (contact@socieux.eu)
2. The Request Form should be completed in **English, French, Spanish or Portuguese**;
3. Attach relevant **supporting documents and information**;
4. **Sign and date** the request;
5. Please upload the Request Form in the **SOCIEUX+** or send it by **email** or **letter** to:

SOCIEUX+ EU Expertise on Social Protection, Labour and Employment
 FPS Social Security – Boulevard du Jardin Botanique 50, Boîte 135
 Telephone: +32 (0) 252 86629 / E-mail: requests@socieux.eu

EVALUATION CRITERIA

Requests for technical assistance actions will be evaluated and approved on the basis of the following criteria:

Basic eligibility requirements

- Is the request originated from a country covered by SOCIEUX+'s geographic scope of intervention? (see Annex 1)
- Is the institution submitting a request a public authority, mandated body or social partner?
- Is the object of the request falling within SOCIEUX+'s field of expertise?

Consistency and Complementarity

- Is your Request in line with national policies and strategies? If yes, please briefly list and describe these policies and strategies? How do these relate with the objectives your Request?
- Is there any on-going or previous EU (or partner) with which you are currently or planning to collaborate in the same in the proposed area of technical assistance? If yes, please indicate the intervention, leading stakeholders and international partners? Please, also explain briefly how the SOCIEUX+ will complement them.

Sustainability

- Are the Request's expected results relevant for the development and/or sustainability of social protection systems, employment & labour policies in your country? If yes, briefly explain how.
- Is the requested technical assistance relevant for the capacity development of your institution? If yes, briefly explain how.

Feasibility

- Are you interested in the technical inputs from a particular EU institution and or EU Member State administration and/or mandated agency? If yes, please provide us the name and/or country of that institution.
- Are there institutions in your region of which experience you could benefit for the implementation of the proposed action? If yes, please provide us the name and/or country of that institution.

Request approval

The requests are assessed and evaluated according to the criteria presented above by the SOCIEUX+ team. The final decision will be communicated by email to the requesting institution(s) approximately three weeks after receipt of the request.

3 FINANCE AND LOGISTICS

Costs covered by SOCIEUX+

For all actions carried out under SOCIEUX+, the following costs can be covered:

- Financial compensation, travel and accommodation for the experts contracted
- Translation of documents
- Interpreters
- For workshops or seminars: costs for venue, catering, interpreters, under certain conditions (please see below).

Expert belonging to the staff of a partner institution benefiting from an action is not entitled to financial allowances if their organization is the beneficiary of the action.

Partner institution involvement

The partner institution should be actively involved in defining the logistic needs of the mission and their preparation. It should contribute to these in kind or financially (e.g. by making meeting rooms, interpretation or resource persons available for the activity). It might be requested to also prepare and execute logistic arrangements.

Annex 1. List of countries eligible under SOCIEUX+¹

Under the **EU Development Cooperation Instrument** (DCI geographic programmes)

Latin America		Asia		Central Asia	Middle East
Argentina	Honduras	Afghanistan	Maldives	Kazakhstan	Iran
Bolivia	Mexico	Bangladesh	Mongolia	Kyrgyzstan	Iraq
Brazil	Nicaragua	Bhutan	Myanmar	Tajikistan	Yemen
Chile	Panama	Cambodia	Nepal	Turkmenistan	
Colombia	Paraguay	China	Pakistan	Uzbekistan	
Costa Rica	Peru	India	Philippines		
Ecuador	Uruguay	Indonesia	Sri Lanka		
El Salvador	Venezuela	Laos	Thailand		
Guatemala		Malaysia	Vietnam		

Under the **European Neighbourhood Instrument**

Algeria	Egypt	Lebanon	Palestine
Armenia	Georgia	Libya	Syria
Azerbaijan	Israel	Moldova	Tunisia
Belarus	Jordan	Morocco	Ukraine

Under the **European Development Fund**

Africa			Caribbean	Pacific
Angola	Ethiopia	Rwanda	Antigua &	Cook Islands
Benin	Gabon	São Tomé &	Barbuda	East-Timor
Botswana	Gambia	Príncipe	Bahamas	Fiji
Burkina Faso	Ghana	Senegal	Barbados	Kiribati
Burundi	Guinea-Bissau	Seychelles	Belize	Marshall Islands
Cameroon	Guinea	Sierra Leone	Cuba	Micronesia
Cape Verde	Ivory Coast	Somalia	Dominica	Nauru
Central African Republic	Kenya	South Africa	Dominican Republic	Niue
Chad	Lesotho	South Sudan	Grenada	Palau
Comoros	Liberia	Sudan	Guyana	Papua New Guinea
Congo (Republic of)	Madagascar	Swaziland	Haiti	Samoa
Congo (Democratic Republic of)	Malawi	Tanzania	Jamaica	Solomon Islands
Djibouti	Mali	Togo	Saint Kitts & Nevis	Tonga
Equatorial Guinea	Mauritania	Uganda	Saint Lucia	Tuvalu
Eritrea	Mauritius	Zambia	Saint-Vincent and the Grenadines	Vanuatu
	Mozambique	Zimbabwe	Suriname	
	Namibia		Trinidad & Tobago	
	Niger			
	Nigeria			

¹ In accordance with EuropeAid assistance