

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2022-07 PSE Palestine*

Action title: *Setting up a comprehensive internal capacity-building and training system for MoSD*

Partner institution: *Ministry of Social Development (MoSD)*

Activity number and title (if applicable): *Activity #3 – Develop a technical note outlining the elements and tools needed to set-up a training management system (TMS).*

Date of implementation of activity/ies:

Preparation: 24 October to 12 November

Onsite mission: 13-26 November

Reporting: until 17 December

Expert positions and responsibilities (by activity):

Activity #3 : Expert #1 (principal) – Social Security Administration & Inspection; Organisational management & administration

Activity #3 : Expert #2 – Social Security Administration & Inspection; Individuals' capacity building/training

Workload:

Activity #1 - Expert #1 : 21 __days

Activity #1 - Expert #2 : 19 __days

Call for experts' reference: **22-07/PSE/3**

Version - #: 1__

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Final

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1 BACKGROUND INFORMATION

1.1 Country overview

The Palestinian National Authority (PNA) is currently located in Ramallah. The entirety of territory claimed by the PNA has been occupied by Israel since the Six-Day War in 1967. Presently, most of the West Bank is administered by Israel though 42% of it is under varying degrees of autonomous rule by the PNA. The term "Palestinian territories" has been used for many years to designate those lands. More recently, the official United Nations terminology has been used, Occupied Palestinian Territory (OPT) increasingly replacing other terms since 1999. The European Union also has adopted this usage.

The lack of peace and reconciliation on the political horizon has created an unsustainable economic situation in the West Bank and Gaza. Even though donor aid had increased government-funded services and fuelled consumption-driven growth from 2007 to 2012, this model of growth has proved unsustainable. The humanitarian context in West Bank and Gaza remains directly tied to the impact of the Israeli occupation. Restricted movement of people, access to resources and basic social services, together with recurrent expropriation of land, settler violence, civil unrest and periodic large-scale armed hostilities have resulted in economic stagnation, high unemployment, poverty and food insecurity.

The OPT's HDI value for 2017 is 0.686— an increase of 4.4% in the last ten years, which put the country in the medium human development category, positioning it at 119 out of 189 countries and territories.

1.2 Sector situation

The Palestinian Central Bureau of Statistics (PCBS) currently sets the poverty line and deep poverty line for a reference household of five (two adults and three children) to ILS 2,470 and ILS 1,974 per month, respectively.

According to the 2017 poverty survey carried out by PCBS, the poverty rates trend worsened in Gaza to 53% compared to 38.9% in 2011 and improved in the West Bank reaching 13.9% compared to 17.6% in 2011. Deep poverty increased in Gaza from 21.1% in 2011 to 33.7% in 2017 and decreased in the West Bank from 7.6% in 2011 to 5.8% in 2017.

1.3 Role of partner institution in the sector

The Ministry of Social Development (MoSD) of the PNA is responsible for implementing the Social Development Strategy (SDS) for the period 2017-2022, in line with the National Policy Agenda 2017-2022, as well as with the commitments towards the international conventions and the SDGs 2030. The National Policy Agenda puts poverty reduction and service delivery at the core the government's responsibility. As such, MoSD is responsible for the overall sector strategy, including initiatives implemented by other Ministries, such as the Ministry of Health and the Ministry of Education.

The SDS puts forward a comprehensive social development approach ensuring that the right to social protection for the most vulnerable individuals is guaranteed - in particular women, children, elderly, and person with disabilities - applying a rights-based approach. Its vision is to achieve: "a strong, solidary, productive and innovative Palestinian society that provides dignified life for all its members, unleashes their potential and believes in rights, equality, justice, partnership and integration". In that perspective, SDS adopts 4 strategic objectives: 1) Reduce the poverty rate; 2) Remove all forms of social exclusion and marginalization in the Palestinian society; 3) Consolidating complementarity in social development policy, in line with SDGs 2030 and other international standards and conventions; 4) Local development groups lead sustainable development initiatives in the marginalized villages and neighbourhoods.

For the period 2017 – 2019, an Operational Management Plan has been established and MoSD's responsibilities clearly stated. While MoSD steers the Plan's execution, the activities it comprises are actually implemented by the 16 regional offices, 11 of which are located on the West Bank and 5 in the Gaza Strip. The main activities regard granting monetary benefits for poor households, people with disability, children and elderly (mainly through the Cash Transfers Programme), but also to enhance economic empowerment, especially for vulnerable and marginalized sectors of the Palestinian society. Also, a Strategic Results Framework (SRF) has been made available to monitor the sector's progress and to report to the Cabinet Secretariat. The SRF reports, among other

things, on the number of families receiving cash transfers or other type of assistance from MoSD, number of individuals in social protection institutions, as well as on the ongoing legislative activity.

2 ACTION DESCRIPTION

As per work-plan.

2.1 Overall objective

Institutional capacities of employment, labour and social protection institutions are strengthened and reinforced.

2.2 Specific objective (s) (purpose)

SO1 Develop a comprehensive internal capacity building and training system that enable the Ministry to deliver the required training courses to achieve its strategic goals and measure the return on investment in employees.

2.3 Expected results

ER1: Capacities and skills requirements are assessed at the Central Ministry, district offices and Centres

ER2: A capacity-building and training strategy for the MoSD is outlined

ER3: Recommendations and tools in terms of human resources and organization needed to build an efficient training system are provided

2.4 Final deliverables

D1: A brief assessment report on the individual capacities and training needs of staff available at MoSD, by functional responsibility and a set of recommendations on priority areas, responsibilities, skills and procedures, including at the regional directorate level, for the next activities.

D2: A training strategy for staff development, including a proposal for training sessions and tools that are required to address the capacity needs identified in the assessment report.

D3: A technical note outlining the elements and tools needed to set-up a training management system (TMS).

3 METHODOLOGY

3.1 General methodology (of the action)

This action's purpose is to enhance the MoSD tools and capacity to implement the Social Development Strategy. The action deploys across three stages, with the final objective of contributing to the development and set up of a comprehensive internal capacity-building and training system that contributes to the pursuit of MoSD's strategic goals.

This technical request is considered complementary, but not overlapping, with a parallel project funded by the EUREP (Office of the European Union Representative in the West Bank and the Gaza Strip): "Strengthening the Monitoring and Evaluation System of the Palestinian Ministry of Social Development". The Ministry of Social Development (MoSD) proposes that the SOCIEUX+ action be integrated into the EUREP project's result area 2 ("An IT-enabled Management Information reporting system producing regular reports on progress against targets and budgets is proposed") and thus contribute to its achievement.

In light of the above, the MoSD foresees synergies in that the SOCIEUX+ action will develop an M&E training strategy and training system that will be integrated into the MIS developed under the EUREP project.

The activities will include: a technical assessment on the training individual needs, and some key recommendations for capacity development of MoSD's staff on priority areas, responsibilities, skills and procedures, including at the regional directorate level (activity 1); a training strategy (activity n.2), and training management system tools (activity n.3).

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Conduct a brief assessment on the individual capacities and training needs of staff available at MoSD, by functional responsibility and formulate recommendations
- Activity 2 – Formulate a training strategy which includes *an indication of training sessions and other capacity-building tools required to address the capacity needs identified in the assessment report.*
- **Activity 3** – Develop a technical note and tools outlining the elements and tools needed to set-up a training management system (TMS).

The present terms of reference cover the services expected for activities of the above work plan:

- **Activity #3.**

3.3 Inclusion of cross-cutting issues

SOCIEUX+ recognises the importance to include cross-cutting issues in social protection, labour and employment policies and systems. The following cross-cutting issues are duly taken into account:

- Gender equality;
- Good governance;
- Social and economic inclusion of vulnerable groups.

4 ACTIVITIES DESCRIPTION

4.1 Tasks

➤ **Methodology:**

The goal of the third activity is to integrate the IT training management system (TMS) into the IT-enabled monitoring and information system (MIS) currently available at the MoSD.

It will do so by developing a technical note including:

- a proposal structure for the database for the IT TMS
- a set of forms required for uploading of data and information into the module for TMS under our IT MIS for M& E; and
- a set of reporting and evaluation forms for monitoring reporting and evaluation of the implementation of the training strategy (strategic objectives human resources and organisational processes including risks assessment sustainability, etc.)

The experts shall agree in the preparation phase on the outline of a technical note, establishing which roles, skills and functions are needed to ensure that the TMS system is well connected with MoSD operations, such as programs and decision-making functions.

Such a proposal shall take into account the capacity of MoSD in setting up and running a MIS, including with regards to the expected costs and capacities required for establishing and running the system; a reflection shall be conducted on the necessary technological endowment, also in view of fully integrating decentralised staff in the training strategy. Learning Management Systems and e-learning options should also be explored, also in view of facilitating self-learning as a way to support learning motivations. The availability and accessibility of knowledge shall be treated as a key challenge in view of aim to capacity development.

➤ **Responsibilities:**

Experts' team:

The principal expert will lead the mission on site. He/she is responsible for the production of all deliverables of the activity (see section 4.2). He/she will also be responsible for the preparation, coordination, implementation and reporting and/or coordination of the overall activity.

The experts shall co-develop a proposal for methodology and agenda together with the Partner institution, to be discussed and validated ahead of the mission. The experts shall travel onsite for a mission of 10 working days. The experts may conduct collective workshops, focus groups, and/or interviews based on the co-developed methodology and agenda.

Partner Institution:

The partner institution shall work in collaboration with experts supporting the preparation and implementation of the activity.

The partner institution shall facilitate the organisation of the activity with regards to the following aspects:

- nominating one or more internal resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation of the activity, including sharing relevant background documents, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation, including external stakeholders
- the material organisation on site (including covering the costs for premises, coffee breaks and logistics).

➤ **Minimum tasks expected from the experts shall include:**

Preparation:

- Get substantial knowledge of the local context; review relevant policy and institutional framework documents.
- Co-develop the mission's methodology and agenda (intermediate deliverables), in collaboration with the Partner Institution.
- Agree with the Partner on logistical arrangements for the implementation of on-site activities.
- Transmit the intermediate deliverables to the SOCIEUX+ team for approval.
- Take part to the pre-mission briefing with SOCIEUX+ team (around 1 week before the start of the action).
- Contact the EU Delegation to organise a briefing and/or debriefing upon arrival (SOCIEUX+ will introduce the experts to the focal point within the EU Delegation).

Implementation:

- During the mission, conduct consultations with the Partner's key staff and other stakeholders deemed necessary to meet for the purpose of this activity as per methodology and agenda. The partner institution shall facilitate and arrange the meetings.

- Present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalisation.
- Participate in the briefing/debriefing with the EU Delegation.
- At the end of the exchanges, ask the interviewed actors to complete the participants' feedback questionnaire (link provided by SOCIEUX+).
- Share with SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

Reporting:

- Timely submit to SOCIEUX+ the final deliverables. Use the templates and evaluation forms provided by SOCIEUX+.
- Go through a round of comments and adjustments in interaction with SOCIEUX+ and the Partner.

4.2 Deliverables

To adjust as necessary

4.2.1 Pre-mission deliverables

- P1: A methodological note, detailing the working approach, tools and methods to employ, a risks analysis, etc. The Methodological Note shall not exceed 3 pages (excluding cover page and annexes).
- P2: A activity/mission agenda, detailing the meetings and working sessions to be held, persons to meet, etc. The Activity/mission Agenda shall not exceed 2 pages.

4.2.2 Final deliverables

Final deliverables (to be transmitted to SOCIEUX+ no later than ten days after the activity's completion):

- **AcR:** Activity Report. To be filled according to template
- **ExMR:** Experts' Mission Report and Experts Evaluation Survey. To be filled according to templates provided by Socieux+ Team
- **ExF:** Online questionnaire to be filled by each individual expert (link to be provided)
- **Technical deliverables: (D3)** Develop a technical note outlining the elements and tools needed to set-up a training management system (TMS).

5 REPORTING AND SUBMISSION OF DELIVERABLES

5.1 Formats

All deliverables and products of the activity (notes, reports, presentations, etc) shall comply with the formats and templates provided by the SOCIEUX+ Team.

All deliverables are to be submitted in electronic in electronic editable versions [Microsoft Word 97-2003 [doc], PowerPoint 97-2003 [ppt] and Excel 97-2003 [xls]; or in equivalent OpenDocument format). Non-editable electronic document such as in Portable Document Format (PDF) shall not be accepted.

Templates for electronic presentations during the activity/mission are provided by the SOCIEUX+ Team. These templates are in Microsoft PowerPoint format and comply with the SOCIEUX+ Corporate Image standards. These templates are to be used as a sole format by all members of the expert mission team. They are to be used for all presentations by the experts during and for the activity/mission. The use by the experts of their own, or their organisation(s), templates or formats are not allowed unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

All versions of deliverables or other products used or produced during activity/mission by the experts shall include the following disclaimer:

"Disclaimer:

The responsibility of this publication sole lies with its authors. The European Union, the European Commission, the implementation partners of SOCIEUX+ and the SOCIEUX+ Staff are not responsible for any use that may be made of the information contained therein."

Please refer to the expert information package for further guidance on communication and templates.

All deliverables are to be provided in English.

5.2 Submission and approval

All deliverables versions (drafts, final or other) shall be submitted directly and only to SOCIEUX+ Team, unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

5.2.1 Pre-mission deliverables

- Pre-mission deliverables shall be submitted no later than 5 working days before the start of activity or departure of the mission of the experts, whichever is the earliest.
- Pre-mission deliverables will be shared and reviewed by the SOCIEUX+ and the Partner Institution. Feedback on the deliverables should be provided to the Principal Expert at latest 2 days before the start of activity or departure of the mission of the experts, whichever is the earliest. Comments and recommendation of this feedback shall be taken into account for the implementation of the activity/mission by the experts. Only the mission agenda shall be resubmitted with revision if requested by the SOCIEUX+ Team.

5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted no later than 10 working days upon completion of the activity or return of the experts.
- Feedback to the first draft version of the report should be provided 10 working days after its submission.
- Inclusion of the feedback on drafts versions is expected 5 working days upon reception of the comments by the principal expert. (In general, no more than one round of feedback and revision is required, unless the quality of the deliverables is considered unsatisfactory by the SOCIEUX+ Team or/and the Partner Institution.)
- Final versions of the deliverables should be approved or rejected no later than 10 working days upon their submission to the SOCIEUX+ Team.
- Final payments and reimbursement of travel costs to experts can only be authorised upon approval of the final version of the deliverables by SOCIEUX+.

6 REQUIRED EXPERTISE

6.1 Expertise profile

Principal expert (Expert 1):

Area of expertise: Social Security Administration & Inspection

Specific skill(s) of expertise: Organisational management & administration

Requirements (essential/required):

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 15 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society;*
- *Relevant experience in designing, managing and/or evaluating training management systems and tools for organizational capacity-building of public sector administrations;*

- Significant experience in assessing organizational capacity needs of public sector administrations;
- Acute sense of diplomacy and institutional relations.

Additional assets (advantageous in selection):

- Fluent in English, written and oral;
- A previous experience in delivering short-term technical assistance in international cooperation;
- A previous professional experience in Palestine or the Middle East

Expert 2:

Area of expertise: Social Security Administration & Inspection

Specific skill(s) of expertise: Individuals' capacity building/training

Requirements (essential/required):

- Education: university level (Masters or PhD relating to the subject are considered a plus)
- At least 10 years of professional experience within EU or regional (Middle East & North Africa) public administrations or, international organisations, academia, social partners, civil society;
- Relevant experience in designing, managing and/or evaluating training management systems and tools for organizational capacity-building of public sector administrations;
- Significant experience in assessing individual capacity needs of staff of public sector administrations;
- Acute sense of diplomacy and institutional relations.

Additional assets (advantageous in selection):

- Fluent in English, written and oral

6.2 Estimated workload

To adjust as necessary

	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	4	10	2	5	21
Expert (#2)	3	10	2	4	19
Total	7	20	4	9	40

7 APPLICATIONS

7.1 Call for experts

All calls for experts for SOCIEUX+ activities are published online on the SOCIEUX+ website. Interested experts should submit their application on the SOCIEUX+ on-line expert database: <https://pmt.socieux.eu> (currently only available in English). The application process is:

1. If they have not already, experts create their SOCIEUX+ account by clicking on “Create an account” using an email address.
2. Login details for their account will be sent to experts by email, experts should create and submit their profile for review by¹:
 - a. Providing contact details
 - b. Providing information on the competences, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, *experts are encouraged to complete in most detail de sections on skills and competences as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*
 - c. Uploading of a curriculum vitae, preferably in Europass format².
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab “Call for experts” and click on “Apply.”

If more information is needed, please contact SOCIEUX+ by email at experts@socieux.eu with the reference number of the application.

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

7.2 Selection of experts

In principle, SOCIEUX+ mobilises experts from the public administrations and mandated bodies of EU member states, and practitioners working for social partners, including:

- Practitioners, civil servants and employees from publicly mandated bodies;
- Collaborators and employees of social partner institutions, such as trade unions and employer associations; and,
- Academic and research institutions.

Active public experts from collaborative institutions are given priority in the selection. Private consultants may also apply. Their application will be considered in case an appropriate public expert cannot be identified.

Only short-listed applicants may be contacted. The selection process may include interviews by phone or other communication means.

Interested candidates may download the **Guide for Experts and Collaborative Institutions** with detailed information on contracting with SOCIEUX+ at www.socieux.eu

7.3 Contracting of public experts

Public experts can be in active duty or retired. Retired employees from international specialised agencies or cooperation agencies can also be mobilised, without regard to their former employer's collaborating with SOCIEUX+ on a specific action. Retired experts are considered as public experts for all purposes, benefits, and financial compensation provided by SOCIEUX+.

Short-listed candidates may be required to provide the contact of employer or proof of their ability to be directly contracted under their status as civil servant or public employee.

7.4 Financial compensations

Contract officials or active-duty or retired employees are entitled to standard fixed allowances of 350 euros per working day worked. The fees of private consultants are negotiated according to their number of years of relevant expertise and the standard scale of SOCIEUX+.

¹ SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

² Europass templates for CVs are available here:
<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

Retired experts are assimilated to public employees for all intents and purposes, benefits and financial compensation provided by SOCIEUX+.

National regulations on remuneration and compensation of public employees and civil servants applies, and may limit the payment of allowances by SOCIEUX+. The responsibility for compliance and verification lies with individual experts and their institutions of origin. The payment of income or other taxes is the sole responsibility of the mobilised experts and/or their organisations.

7.5 Travel costs

All travel expenses for the mobilised experts (public, private or international institutions) are covered by SOCIEUX in accordance with the **Guide for Experts and Collaborative institutions** with detailed information on contracting with SOCIEUX+ (version as on date of signature of the contract).

8 COMMUNICATION & VISIBILITY

SOCIEUX + can use its communication channels, such as the web, newsletter and other media, to share information about the implementation and results of the activities. For this, contributions of the experts mobilised are expected. The experts may be requested to provide such contributions in the field of communication as photographs, provide short texts, and interviews.

Short briefings, before and after the mission, with the Communication Officer of SOCIEUX+. This briefings will provide the opportunity to identify communication opportunities and strategies.

For specific activities, visibility products, such as brochures, USB sticks, notebooks and pens, can be made available to experts for on-site distribution.

9 CODE OF CONDUCT

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to the delivery of products. The SOCIEUX+ Team will assist experts to fulfil their assignments by supporting and advising on the preparation of background materials before meetings. The SOCIEUX+ team will collect feedback from partner institutions and relevant stakeholders to ensure that mission reports and recommendations are delivered to national authorities, the EU Delegations in the partner countries and EuropeAid.

The experts mobilised are not representing SOCIEUX+ or the EU. Technical opinions and recommendations expressed are their own. They shall not express negative opinions on the implementation of actions supported by SOCIEUX+ to third-parties. Nevertheless, they shall be aware of SOCIEUX+'s objectives and functioning, and promote its services at the best of their knowledge, whenever possible and feasible.

The experts shall perform their duties in the Partner Country in a way that is fully compliant with and respectful of the local institutions, policies and cultural behaviours. They shall particularly adopt a culturally-sensitive behaviour in their way to deal with the local counterparts.

10 OTHER CONSIDERATIONS

If applicable

...Text...

11 ANNEXES

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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 by the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development, entitled *Our world, our dignity, our future*. A significant number of cooperation initiatives in these fields are funded by geographic or thematic instruments of the EU in different countries. Those initiatives are highly structured and address the medium- to long-term needs of partner countries. However, short-term measures and peer-to-peer cooperation to promote the development of social protection systems are needed to complement the EU's cooperation with third countries. SOCIEUX+ - EU Expert Facility on Employment, Labour and Social Protection responds to this need.

The SOCIEUX+ facility was setup by the EU through co-funding from France, Spain and Belgium and the resources managed by the European Commission's Directorate for Development and Cooperation (EuropeAid). The facility is implemented by a partnership composed of development cooperation agencies from Member States: Expertise France (the partnership lead), Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development Agency (Enabel).

The general objective of the Facility is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries. Its 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 short-term, peer-to-peer technical assistance and knowledge development.

SOCIEUX+ recognises the impact of social protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems. SOCIEUX+ also complements the efforts made through other European Union initiatives.

The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

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