



EU expertise on social protection,
labour and employment

GUIDE FOR INSTITUTIONS & SOCIAL PARTNERS IN PARTNER COUNTRIES

Version October 2, 2019

This guide provides information about the SOCIEUX+ facility, its support and modalities of intervention. It is aimed at institutions and social partner organisations in countries that have international cooperation partnerships with the European Union, and wishing to collaborate with SOCIEUX+.

The SOCIEUX+ Team is committed to facilitating peer-to-peer exchanges and cooperation among public practitioners, and social partners.

For more information on SOCIEUX+, please visit our website at www.socieux.eu or contact us at contact@socieux.eu.

*SOCIEUX+ is implemented by a
partnership led by:*

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European Union*



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1 WHAT IS SOCIEUX+

Facilitating peer-to-peer exchanges

The *European Union Expert Facility on Employment, Labour and Social Protection* (SOCIEUX+) is a technical cooperation facility set up to respond to the needs for capacity building of international cooperation and development partner countries of the European Union (EU). SOCIEUX+ enables peer-to-peer exchanges and institutional cooperation between EU Member States and partner countries.

SOCIEUX+ is results-oriented and demand-driven only. It responds to the direct requests of public institutions and social partners organisations in EU partner countries. It contributes to designing, expanding and managing inclusive, effective and sustainable labour and employment policies and social protection systems.

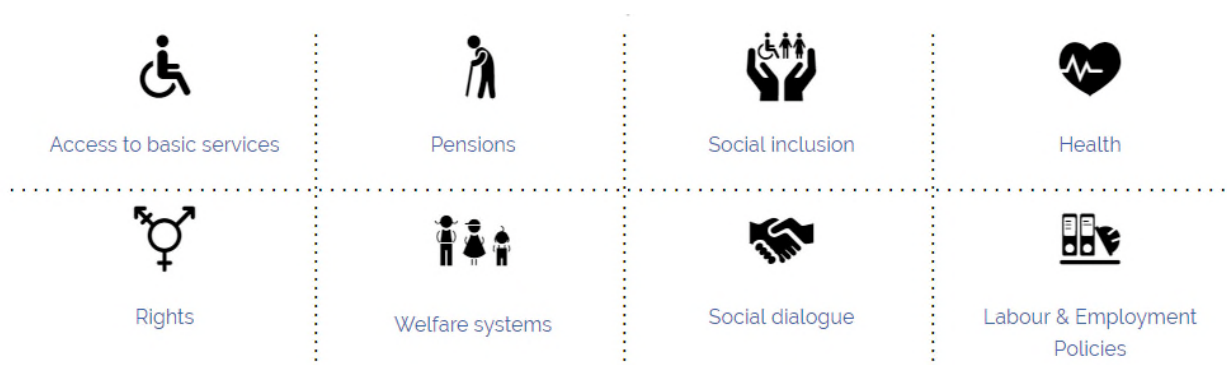
SOCIEUX+ connects practitioners and institutions by mobilising high-level EU expertise for short-term technical cooperation activities with their peers outside the EU. It primarily draws on expertise within EU Member States' publicly mandated bodies and social partners, but also relies on joint actions with specialised international agencies and the academia. When necessary, it capitalises on Triangular Technical Cooperation by mobilising teams of public experts from EU and partner countries. Private consultants may also complement expert mission teams in SOCIEUX+ actions.

SOCIEUX+ actions are micro-projects implemented through short-term activities. They are designed in collaboration with the partner institution to best address their needs. SOCIEUX+ does not provide financial cooperation, including financing of events or purchasing of equipment or materials, or compensation for the work or contributions of staff from requesting institutions and social partners.

SOCIEUX+ is implemented by a partnership of international cooperation agencies of the EU Member States, France, Belgium and Spain, and co-funded through EU international cooperation and development instruments.

Contributing to better social protection, labour and employment

SOCIEUX+ supports policies and measures on social protection, labour and employment, with the aim of alleviating poverty, reducing vulnerability, and providing income security and access to essential services and job opportunities. The Facility advances inclusive social protection and growth, particularly in low and middle-income countries.



Social protection

SOCIEUX+ contributes to the design and implementation of social protection systems, and programmes that expand coverage and increase equality, inclusivity, efficiency, appropriateness, and fiscal feasibility and sustainability, such as:

- Legal and institutional frameworks 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 cross-sectoral 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;
- Empowering civil society and social partners;
- Social assistance and the protection of most vulnerable categories of the population; and,
- Innovative means of extending social protection coverage in the informal economy.

Labour and employment

SOCIEUX+ contributes to the design and implementation of effective employment strategies and labour market policies, such as:

- Comprehensive employment strategies across 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 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.

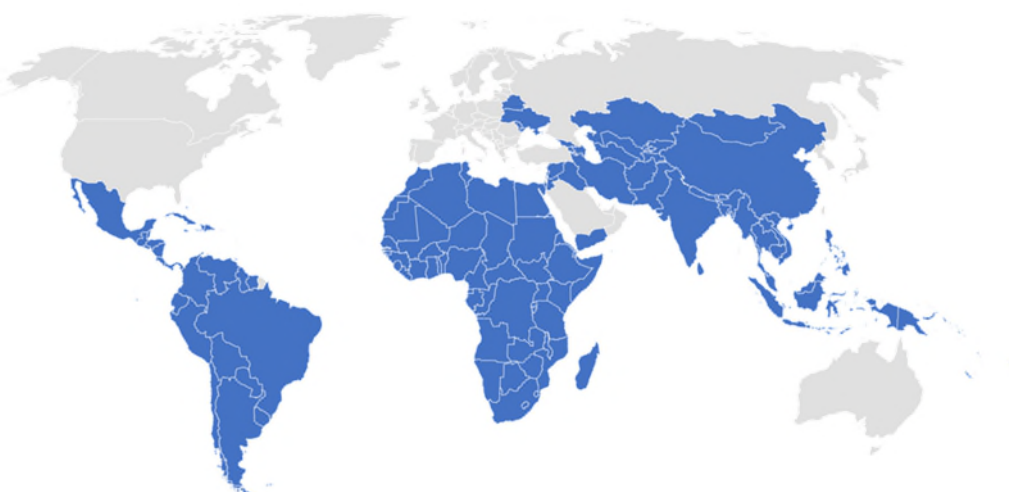
Partnering with public institutions and social partners

SOCIEUX+ actions can be implemented in 155 eligible countries and territories in:

- Latin America, Asia and the Middle East;
- Africa, the Caribbean and the Pacific;
- the European Neighbourhood; and,
- Overseas Countries and Territories.

SOCIEUX+ cooperates with public authorities and mandated bodies in charge of social protection, labour and employment at all levels (national, regional and local) in partner countries. Public and semi-public sector bodies are eligible, including: central governments; ministries; legislative councils and regional governments; and other mandated bodies and institutions responsible for the implementation or provision of social protection, labour and employment initiatives.

SOCIEUX+ also cooperates with social partners engaged in social dialogue to influence policy and strategic agendas such as trade unions, employers' and workers' organisations and associations.



Promoting synergies

SOCIEUX+ seeks synergistic collaborations in the preparation and implementation of actions. SOCIEUX+ actions deliver results by complementing, rather than replacing, existing national efforts and long-standing cooperation agreements between partner countries, institutions and social partners and international or bilateral agencies. Medium- and long-term policy agendas remain under the ownership of national stakeholders.

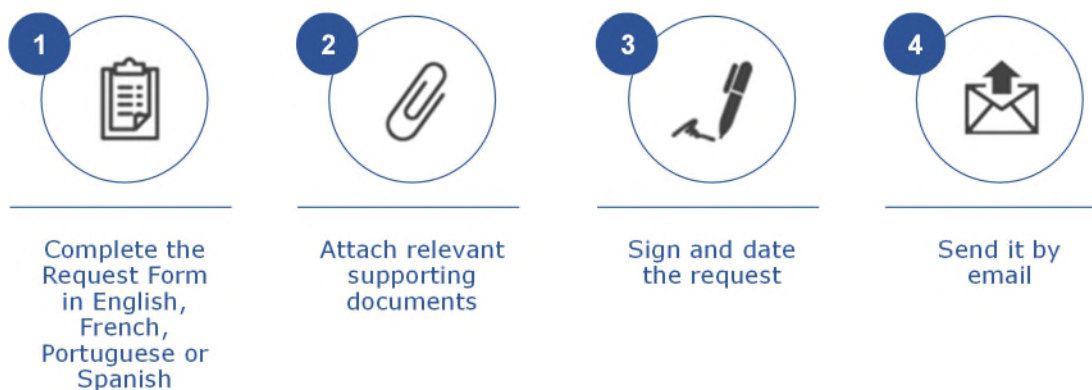
Agencies, and their respective international cooperation programmes, are referred to as “supporting entities” if they have an active role in a SOCIEUX+ action. Supporting entities may accompany the preparation and submission of requests to SOCIEUX+, or the implementation of activities.

2 HOW TO PARTNER WITH SOCIEUX+

Submitting a request

Interested institutions and social partners interested in partnering with SOCIEUX+ should download the Request Form available in English, French, Portuguese or Spanish at www.socieux.eu/join-us/partner-countries, and:

1. Complete the Request Form;
2. Attach relevant supporting documents and information;
3. Sign and date the request; and,
4. Send the request by email to requests@socieux.eu or upload it to our online platform at www.pmt.socieux.eu. Forms should be submitted in signed-pdf and editable Microsoft Word versions.



If you experience difficulty downloading or completing the Request Form, please contact SOCIEUX+ at contact@socieux.eu.

After receiving the completed form, SOCIEUX+ will promptly notify the requesting institution. The notification may already confirm the eligibility of the request, based on its geographic and thematic scope, and the legal status of the requesting institution or organisation. Notification of the eligibility of a request is not a confirmation of its approval.

Formulating a request

Interested institutions and social partners may rely on supporting entities for the formulation of requests (see above subsection on *Promoting synergies*).

Requests are assessed on key criteria based on the relevance and feasibility of an action. The below list of questions is indicative of the rubric used by SOCIEUX+ in assessing a proposed action. Interested institutions and social partners should keep this checklist in mind when preparing their requests.

Relevance

- Will the proposed action contribute to the expansion and improvement of access to better employment opportunities and inclusive social protection systems?
- Will the proposed action enhance capacities to better design, manage and monitor inclusive, effective and sustainable employment strategies and social protection systems?
- Is the proposed action aligned with national policies and strategies for social protection, labour and employment?
- Are the proposed action's objectives directly linked to the challenges and needs for capacity building and reforms of the requesting institution?
- Does the proposed action consider the implications on crosscutting issues? In particular: good governance and democracy; the promotion of human rights; gender equality; non-discrimination; children's rights; and, the rights of persons with disabilities?

Feasibility

- Are the proposed action's expected results sufficiently clear and narrow that they could be addressed in a short-term activity (implementable over a reasonable timeframe, such as six months)?
- Can concrete deliverables be produced to achieve the expected results of the proposed action?
- Can the deliverables, or their intermediates, be produced through short-term activities of one to three weeks?
- Can activities be implemented through peer-to-peer exchanges with experts from EU Member States' public or mandated institutions, or social partners?
- Can staff of the requesting institution, social partners and other key stakeholders actively participate to the activities of the proposed action?

Complementarity

- Is the proposed action not likely to overlap, replace or duplicate the support of international partners other than SOCIEUX+?
- Can the activities be implemented jointly by SOCIEUX+ with another international partner?
- What financial or in-kind contributions are available to support the implementation of the action (from the requesting institution, social partners or supporting entities)?
- Will there be a role in the implementation of the proposed action for the supporting entity that collaborated in the request submission?
- Is there an experience from a particular EU Member States' public institution or social partner that should be considered for the proposed action?
- Could the experience of a particular country in the region complement EU expertise for the proposed action?

Safety and security

The SOCIEUX+ Team considers the security conditions for on-site mobilisation of experts to be of the utmost importance. No action can be implemented in geographic areas where the safety of mobilised experts cannot be guaranteed.

Agreeing on expected results

Dialogue is initiated with requesting institutions and organisations at an early stage to ensure that SOCIEUX+ can make a substantiated recommendation to the European Commission. If necessary, the objectives and results of a potential action are reclarified and narrowed to ensure that an action fits within the mandate of SOCIEUX+. Using these expected results, SOCIEUX+ consults with the European Commission before formally initiating the formulation of an action.

If only overall objectives of a request can be framed but concrete expected results could not be clearly formulated, an on-site fact-finding mission may be organised to assess the feasibility of an action and subsequently develop an appropriate workplan. Fact-finding missions are implemented by in-house experts from SOCIEUX+, with the support of other thematic experts when necessary. The report of this fact-finding mission and the proposed workplan will form the basis of the recommendation of SOCIEUX+ to the European Commission.

3 WHAT SOCIEUX+ PROVIDES

Formulation of tailor-made actions

Actions are formulated based again on dialogue between in-house experts of SOCIEUX+, partner institutions or organisations, and mobilised experts. The main product of this formulation is a workplan of short-term activities. The workplan is tailor-made for each specific situation, and designed to deliver agreed-upon results. However, the workplan remains flexible during the entire duration of an action so that activities can be adjusted to ensure a results-oriented management and implementation.

SOCIEUX+ activities focus on peer-to-peer exchange. They address structural or institutional needs for capacity building, including:

- Gaps and needs assessment for capacity building;
- Design of capacity building and development measures;
- Sector and functional analysis (and recommendations);
- System 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 mandate of SOCIEUX+.

SOCIEUX+ activities take place on-site at the partner country level and rely on the mobilisation of mixed teams of public experts. On-site activities are implemented through short-term missions of one to three weeks carried out, generally, by a team of two mobilised experts from different EU Member States or institutions. In practice, SOCIEUX+ activities may take different forms, such as:

- Expert advice and consulting on specific technical issues;
- Screening and reviews of documents/programmes;
- Expert support in drafting legislation/strategies;
- Training of trainers;
- Technical trainings;
- Fact-finding/assessment missions;
- Roundtable discussions;
- Thematic workshops; and,
- Other measures that can be provided through short-term, peer-to-peer exchange formats.

SOCIEUX+ may also support single-activity actions for targeted needs, such as high-level regional peer consultations. For these, a simplified procedure is used for the approval of an action.

In exceptional cases, and with appropriate justification, additional measures can complement on-site activities, such as remote support and study visits to third countries. However, study visits cannot be the first or last activity of a workplan.

The schedule for activities is owned and set by the partner institution but needs to consider the delays for the identification and mobilisation of experts.

Mobilisation of adequate and timely expertise

The rapid mobilisation of expertise is a constant effort of SOCIEUX+. The Facility relies on several channels to engage EU Member State institutions and social partners in its actions, including:

- Reliance on national focal points to disseminate calls for experts across EU Member States;
- Publishing calls for experts on the websites of SOCIEUX+ and implementation partners;
- Dissemination and direct contacting of recommended experts, institutions and organisations identified by the partner institution; and,
- Identification of potential experts in the large online database maintained by SOCIEUX+.

SOCIEUX+ also has collaborative agreements with EU Member States' social protection, labour and employment institutions. Collaborative Institutions are recognised in their respective countries for their excellence, and which often have experience in international cooperation. The mobilisation of experts from collaborative institutions is based on a simplified procedure.

Experts' profiles are shared with partner institutions at the early stages of the selection process. In addition to their technical capabilities, SOCIEUX+ aims to mobilise experts with the appropriate language skills, to ensure the smooth implementation of exchanges with partner institutions.

Upon selection of experts, the preparation of mission and activities is initiated with the partner institution. Experts participate in the review and framing of activities, while partner institutions retain an active role also in the implementation of activities and the overall mission.

Sharing responsibilities

Partner institutions have a central and active role in the formulation and, also, implementation of actions. They are the ultimate owners of activities. This ownership is reflected in partner institutions' roles in shaping follow-up activities and workplans, but also in actively contributing human, intellectual and physical resources to the implementation of activities. Such resources include:

- Venues, materials and interpreters (as needed) for trainings, meetings and workshops;
- Publication and translation of reports, manuals and other documentation;
- Transportation of local participants for workshops, seminars or meetings;
- Coordination of logistics associated with the implementation of activities, such as the confirmation of visit schedules, invitations to workshops, and confirmation of appointments;
- Temporary workspace for SOCIEUX+ experts, to ensure the experts are effectively able to collaborate with their peers and counterparts;
- Interpretation and facilitation of exchanges between mobilised experts and their peers;
- Facilitating the travel of mobilised experts, e.g., through invitation letters for visas, and providing advice on accommodation and security conditions; and,
- Making all relevant staff available for activities.

Supporting entities of partner institutions may complement or provide contributions for the implementation of an activity. When this occurs, SOCIEUX+ recognises and acknowledges these activities as joint efforts in its communication channels and materials.

The support of SOCIEUX+ is limited; not only in time but also in nature. SOCIEUX+ only covers the direct costs associated with the mobilisation of experts; this includes travel costs, financial compensation, and interpretation services when they cannot be provided by partner institutions. In principle, the translation of products generated through SOCIEUX+ activities should be covered by the final recipients of the deliverables (partner institutions and social partners). SOCIEUX+ does not cover direct financial support, including attendance costs and per diems for participants in meetings or workshops.

SOCIEUX+ support for study visits is strictly limited to the travel costs of small delegations, and the identification of a host institution. Partner institutions contribute to the implementation of study visits, among others, through formulation of the learning objectives of the visit. Lessons learned from study visits are compiled by the head of the delegation in a report shared with SOCIEUX+.

Monitoring and evaluation

In-house experts of SOCIEUX+ accompany the activity from its preparation to the finalisation of its deliverables. These are responsible for:

- Finalising of the terms of reference for activities and experts;
- The briefing of mobilised experts prior to missions;
- Liaising between mobilised experts, supporting entities and partner institutions.
- Debriefing mobilised experts on the completion of missions;
- Reviewing products of experts before delivering to partner institutions;
- Collecting feedback from partner institutions on implemented activities.

SOCIEUX+ uses indicators of capacity building in its evaluation of actions and reporting of results. The feedback of partner institutions is necessary to accurately capture these indicators. Partner institutions provide their feedback on the overall process and achievement of results through brief online surveys completed at the end of supported actions or activities. Partner institutions may be asked to participate in external evaluations of SOCIEUX+.

Participation in knowledge development activities

SOCIEUX+ is committed to generating good practices from supported actions and making these available to the international cooperation community and all institutions and social partners interested in social protection, labour and employment. As such, SOCIEUX+ also translates the experience of selected actions into knowledge products. SOCIEUX+ also participates and organises knowledge development events, where peer-to-peer exchanges have a central role. Partner institutions are consulted on the development of knowledge products related to their actions. They may be invited to contribute to the development of products or events organised or supported by SOCIEUX+.



4 ELIGIBLE PARTNER COUNTRIES

Countries eligible to receive support from SOCIEUX+ are determined from Article 1 of Regulation (EU) No. 233/2014 of the European Parliament and of the Council, 11 March 2014. This regulation establishes a financing instrument for development cooperation for the period from 2014-2020, for programmes covered by Development Cooperation Instrument (DCI), the European Neighbourhood Instrument (ENI) and the European Development Fund (EDF).

Table 1: Eligible countries under Development Cooperation Instrument.

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

Table 2: Eligible countries under the European Neighbourhood Instrument.

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

Table 3: Eligible countries under the European Development Fund.

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

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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