

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2022-23 MONGOLIA*

Action title: *Survey on pension adequacy and spending of the single elderlies*

Partner institution: *Training, Assessment and Research Institute of Labor and Social Protection (TARILSP)*

Activities number and title:

- Activity #1 – Finalizing the sampling and the survey's questions, based on EU examples **(on-line)**
- Activity #2 – Joint analysis of data resulting from the survey on the adequacy of pension for the single elderlies **(on-site)**

Date of implementation of activities (on-site):

- Activity #1 – tentative dates from *November 14th, 2022 to December 16th, 2022*
- Activity #2 – tentative dates from *January 9th to February 24th, 2023, with on-site mission from January 29th to February 12th, 2023*

Expert positions and responsibilities (by activity):

- Activities #1 and #2: Expert #1 (principal)– **Expert in qualitative and quantitative research and analysis (pension adequacy)**
- Activities #1 and #2: Expert #2 – **Expert in Pension Schemes**

Ideally, both experts would participate to the activities #1 and #2 to ensure a continuity in the technical cooperation with TARILSP.

Workload:

Activity #1 – Expert #1:	17 days
Activity #1 – Expert #2:	15 days
Activity #2 – Expert #1:	21 days
Activity #2 – Expert #2:	19 days

Call for experts' reference: **22-23/MGN/1-2/1** and **22-23/MGN/1-2/2**

Version - #: 1

☒ Draft

☐ Final

Date: *October 12th, 2022*

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Partnership led by

Co-financed by the European Union



1 BACKGROUND INFORMATION

1.1 Country overview

Mongolia is a landlocked country located between China and Russia. It is a middle-income country.

Over the past 30 years, Mongolia has transformed into a vibrant democracy, tripling its GDP per capita since 1991. Primary school enrolments are at 97%, coupled with impressive declines in maternal and child mortality (45 per 100,000 live births in 2017 and 15.6 per 1,000 live births in 2019 respectively). In 2015, 4 per cent of the economically active population worked in mining and quarrying; 28 per cent in agriculture; and 30 per cent in construction, retail trade and manufacturing.

Mongolia holds vast quantities of untapped mineral wealth. Mongolia's economic growth rebounded in the first half of 2021 on the back of robust exports and a surge in private investment, mainly in the mining sector. With vast agricultural, livestock and mineral resources, and an educated population, Mongolia's development prospects look promising in the long-term assuming the continuation of structural reforms.

However, past economic growth has not yielded social and economic benefits for all. Poverty (as formally defined) remains a significant concern despite its continued decline - from a national average of 27.4 per cent in 2012 to 21.6 per cent in 2014. Large portions of the population have fragile livelihoods and incomes, and thus remain vulnerable to poverty. The extremely, moderately and near poor populations, estimated around 10 per cent of the economically active population in 2016, still rely on social insurance to be able to work themselves away from poverty. Growing gender disparities have also marked Mongolia's economic growth. The youth unemployment rate of 2015 (national estimates) is at 16.9 per cent but with 16.84 per cent for male youths and 19.41 per cent for female youths.

The Mongolia Sustainable Development Vision 2030¹, includes raising Mongolia to upper middle-income country status, increasing annual economic growth, reducing income inequality, improving health and educational outcomes, protecting the environment and dealing with the challenges of climate change, and ensuring good governance and global competitiveness.

The Mongolian Government aims also to improve public service delivery to citizens through technological renewal and digitalisation, in order to achieve its Vision 2050 – Mongolia's long term development policy.

1.2 Sector situation

According to an ILO publication in September 2022², "Mongolia needs to make difficult decisions regarding its pension scheme"; with an ageing population, the reality is that the current system requires reform on pension.

In 2020, the population of Mongolia was estimated at 3,253.3 thousand, of which 390,1 thousand were the people aged 55 and above. Out of these 390,1 thousand people, 332.9 thousand people benefit from an old-age pension from the social insurance fund and 3.9 thousand people receive pensions for the elders from the social welfare fund.

In Mongolia, the number of single elderly people has been increasing year by year. For instance, the number of single elderly people was 17,966 in 2003 and it reached 27,066 in 2013 and 41,511 in 2020³, representing with a two-fold increase in 17 years. According to the HelpAge Social Pensions

¹ https://cabinet.gov.mn/wp-content/uploads/2050_VISION_LONG-TERM-DEVELOPMENT-POLICY.pdf and <https://www.globalpartnership.org/sites/default/files/document/file/2020-12-17-towards-mongolia-long-term-development-policy-vision-2050-advancing-education-equity-efficiency-outcomes.pdf>

² https://www.ilo.org/beijing/information-resources/public-information/features/WCMS_856095/lang--en/index.htm

³ Mongolian National Statistics Office, www.1212.mn

database⁴, the population of 60 and over in 2050 would indeed be likely to reach 24,5% of the total population in 2050.

The National Statistics Office of Mongolia conducted “A Study of Some Social and Economic Indicators of the Elderly” in 2018, in which it was stated that pensions and benefits accounted for most of the monthly income of the single-elderly households.

The two factors of a progressive increase in the number pensioners and the importance of pensions as source of revenues for the elderly, and particularly those living alone, demand to base any future reform of the pension systems on an analysis of the adequacy and sustainability of benefits in relation to the needs of the right-holders.

1.3 Role of partner institution in the sector

The Research Institute of Labor and Social Protection (RILSP), created in 2016, merged during the summer 2022 with another organization which also operates under the Ministry of Labor and Social Protection of Mongolia, the Technical and Vocational Education and Training Assessment, Information and Methodology Center. Both institutions are now combined into a single organization named ‘The training, Assessment and Research Institute of Labor and Social Protection’ (TARILSP).

The mission of the TARILSP is to conduct research, studies and analyses on employment, social protection and population trends, and to formulate policy proposals. The TARILSP cooperates with international organization and their programs and projects, national research institutions, non-governmental organizations and individuals in the field of social protection and labour and employment. The former RILSP carried out baseline survey and analysis, drew conclusions and provided policy suggestions on issues as future tendency of labour force, payroll, labour norms and normative, minimum wage, labour legislation, occupational safety and health standards, social welfare policy, social welfare services for targeted groups, demographic policy, social insurance and population development policy.

Action 2022-23 is aligned with the operational strategic objective of the Ministry of Labour and Social Protection of Mongolia which indicates to “*develop, organize and coordinate draft laws, policies, strategies, program options, drafts of legislation aimed at ensuring the development of children, youth, the elderly and families*”.

The TARILSP will launch in November 2022 a survey on pension adequacy for single elderlies. The data for the survey will be collected in December 2022 by the researchers of TARILSP, using telephone survey method and will focus only on single elderlies living alone. According to the data obtained from the National Statistics Office of Mongolia, 54.912 people enter in the category of single elderly living alone (of which 13.690 are men, aged 60 and above, and 41.222 are women, aged 55 and above). The sample size was calculated as 381, by a simple random sampling method. The results of the survey will be used for determining challenges faced by the single elderlies and planning response measures against the challenges, ensuring pension adequacy.

2 ACTION DESCRIPTION

2.1 Overall objective

- Access to employment and social protection is expanded to poor and vulnerable groups.

⁴ <http://www.pension-watch.net/country-fact-file/mongolia>

2.2 Specific objective (s) (purpose)

- **S01:** To assess whether the social protection (pension, benefit, welfare) for the single elderlies is sufficient to ensure their needs and maintain living standard and to analyse spending patterns.

2.3 Expected results

- **R1:** A survey on pension adequacy for single elderlies is implemented and its findings analysed.
- **R2:** The TARILSP formulates policy recommendations to policy makers on pensions for single elderlies.

2.4 Final deliverables

- **D1.1:** An analysis of tools and sampling for the data collection for survey on pension adequacy, with a focus on single elderlies, with recommendations
- **D1.2:** A compendium of the presentation of the EU best practices in the area of pension adequacy (PPT presentation, videos, studies...)
- **D2.1:** Technical report: an analysis and visualization of the data collected on single elderlies
D2.2: Technical report: A list of recommendations/suggestions on pensions for single elderlies, with a focus on pension adequacy

3 METHODOLOGY

3.1 General methodology (of the action)

The technical assistance provided by SOCIEUX+ through mobilized EU public experts for this action 2022-23 shall unfold in two activities. The **first peer-to-peer on-line activity** shall **provide an analysis of tools and sampling for the data collection for the survey** on pension adequacy for single elderlies to be launched in November 2022; the experts together with TARILSP will review and finalize the survey's tools and processes. The **second one on-site** will strengthen the capacities of the TARILSP staff on **data collection and analysis through on-the-jobs trainings**, and the experts' team and TARILSP will jointly formulate policy **recommendations and suggestions on pensions for single elderlies**, with a focus on pension adequacy.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Finalizing the sampling and the survey's questions, based on EU examples (on-line)
- Activity 2 – Joint analysis of data resulting from the survey on the adequacy of pension for the single elderlies (on-site)

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

- **Activity 1 – Finalizing the sampling and the survey's questions, based on EU examples (on-line)**
- **Activity 2 – Joint analysis of data resulting from the survey on the adequacy of pension for the single elderlies (on-site)**

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;
- Human rights (including rights of children, people living with disabilities, vulnerable groups and minorities); and,
- Social and economic inclusion of vulnerable groups.

4 ACTIVITIES DESCRIPTION

4.1 Tasks

4.1.1 Activity #1 - Finalizing the sampling and the survey's questions, based on EU examples

The key purpose of pension systems is to protect older people from poverty and to allow them to enjoy decent living standards and economic independence when ageing. Financial sustainability of pension schemes is the indispensable means to this end. Pensions affect public budgets and labour supply in major ways and these impacts must be considered in pension policy. On the other side, pension benefits have to be adequate in order to respond to the objective of securing a dignified life for the elderlies. The adequacy of pensions is measured by: 1) their ability to prevent poverty; 2) the degree to which they replace income from work; 3) the time people spend receiving a pension⁵.

The Training, Assessment and Research Institute of Labor and Social Protection (TARILSP) will implement from November 2022 to February 2023 a survey on pension adequacy for single elderlies.

The action 2022-23 will start with a first **on-line mission to make recommendations on the sampling and survey's tools that shall be employed in data collection to be implemented in November 2022**. This peer-to-peer technical cooperation will analyse the data, tools and methodology used by the TARILSP, while showcasing EU best practices. As result of this activity, a survey model will be jointly developed to be employed in the upcoming surveying data collection dedicated to gather information related to pension, mostly for elderlies.

This mission will be organized by the EU experts mobilized by SOCIEUX+ in collaboration with the Training, Assessment and Research Institute of Labor and Social Protection (TARILSP).

Concrete EU examples shall be showcased to TARILSP staff (data managers and staff in charge of the survey) and, possibly, other relevant stakeholders identified by the Partner. Main areas of attention would be:

- definition of the scope and population target of the survey
- structure of questionnaires
- other relevant metrics and analytics considerations

At the end of the activity, the Partner shall have available a final set-up for the implementation of the survey planned in November 2022, including the definition of the scope and target population of the survey, the tools and planning for its actual deployment (including the very survey questionnaire)

⁵ European semester thematic factsheet, « Adequacy and sustainability of pensions », 2017, in https://ec.europa.eu/info/sites/default/files/file_import/european-semester-thematic-factsheet-adequacy-sustainability-pensions_en_0.pdf

and a broad reference framework for data collection that would account for peculiarities (weighting factors, gender analysis, rural/urban divide, participants' biases, etc.).

This analysis will also allow the EU public experts mobilized for this activity to systematize some general recommendations to the TARILSP with regards to structural improvements in the actual surveying methodology. Those recommendations will also provide a conceptual framework for the next activity (analysis of the data collected and suggestions for policies for single elderlies).

This first activity is foreseen to be implemented on-line, with the support of the SOCIEUX+'s e-learning platform. The use of SOCIEUX+'s platform could allow to compile all relevant material (PowerPoint presentations, videos...) and to allow online (face-to-face) and offline interactions, as relevant. The use of the platform would also make possible not only for people in Ulan Baatar to connect but also from the regions.

To ensure mutual understanding during implementation, translation and interpretation from Mongolian to English and vice versa would also be necessary throughout the mission.

Responsibilities:

- UE experts mobilized by SOCIEUX+:

The mission shall be implemented on-line via the SOCIEUX+ e-learning platform. The experts shall be introduced to the platform by SOCIEUX+ staff and shall be provided with all the necessary information and logistics to enable its use: account registration to trainers and users, practical guidance, creation of the course and setup of its basic features.

The experts will be responsible for creating the structure of the peer-to-peer sessions, uploading its content and encouraging use of its interactive features such as forum, chat, glossaries, quizzes, online meetings.

The principal expert will lead the mission on-line. He/she is responsible for the production of all deliverables of the activity. 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 (TARILSP), to be discussed and validated ahead of the mission.

- Partner Institution (TARILSP):

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

The TARILSP 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/workshop and ensuring their participation, including of external stakeholders
- the provision of a list of participants for setting up the online course, and ensuring their participation to the various sessions and the completion of the feedback questionnaires (PAF).
- the TARILSP will support SOCIEUX+ in identifying interpreters/translators English/Mongolian/English
- the TARILSP will provide interpretation for the preparatory meetings and debriefings with the experts mobilized by SOCIEUX+.
- Translation of relevant written documents will be covered by SOCIEUX+.

Tasks:

The main tasks of the mission team include:

Preparation phase – ON-LINE

- **Task #1** – Ahead of the mission, to get substantial knowledge of the local context; review any relevant background documents provided by the SOCIEUX+ Team and/or the Partner. The experts will familiarise themselves with the different templates and evaluation forms provided by the SOCIEUX+ Team.
- **Task #2** - Preliminary contacts with the Partner in view of the preparation of the mission's methodology and agenda.
- **Task #3** - A briefing meeting will be organised between the experts and the SOCIEUX+ team at the very beginning of the activity. The purpose of this meeting will be to validate the intermediate deliverables (methodological note and agenda), which will have to be approved by the SOCIEUX+ team, as well as to clarify any other aspects to be taken into account. This includes possibilities in terms of production of communication materials and knowledge management. A separate meeting could be arranged with the SOCIEUX+ communications specialist and/or the knowledge development specialist, as appropriate.
- **Task #4** - contact the Delegation of the European Union in Mongolia to arrange a meeting on-line (briefing and/or debriefing depending on the interest of the EUD).
- **Task #5** – Settle the logistical arrangements with SOCIEUX+ for the implementation of the activity (access to SOCIEUX+'s e-learning platform...).

Implementation phase – ON-LINE (*The details of this phase will follow the methodology and agenda prepared beforehand*):

- **Task #1** – in collaboration with the TARILSP, prepare all relevant documents for the realization of the activity (small questionnaires for interviews, focus groups or any other documents that could be useful...)
- **Task #2** – to conduct consultations with the Partner's executives and staffs, as well as any other relevant actors who can support the activity.
- **Task #3** – To 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 finalization.
- **Task #4** – The experts will be available for a debriefing on-line with the EU Delegation.
- **Task #5** – Depending on the visibility and/or knowledge development possibilities identified during the preparation with the SOCIEUX+ team, the experts will be able to transmit to SOCIEUX+ any useful material to inform the public about the activity (photos, interviews, notes or articles), as well as making short videos presenting the actors involved, the activity and the results, if necessary.

Reporting phase – ON-LINE

- **Task #1** - Finalisation of the deliverables of the activity; experts may be invited to make changes/additions to the deliverables, taking into account the Partner's feedback.
- **Task #2** - Experts will complete additionally an Expert Mission Report (ExMR) and a Feedback Form (ExF), to be shared only with SOCIEUX+.

4.1.2 Activity #2 - Joint analysis of data resulting from the survey on the adequacy of pension for the single elderlies

In continuity of the 1st activity regarding the sampling of the survey, the second activity (**on-site**) **will support the TARILSP to analyse the data collected during the survey on pension adequacy for single elderlies and to develop recommendations and suggestions for policies for single elderlies**, with a focus on pension adequacy.

Ideally, the same team of experts from EU Member States will participate in both activities.

This mission will be organized by the EU experts mobilized by SOCIEUX+ in collaboration with the Training, Assessment and Research Institute of Labor and Social Protection (TARILSP).

This activity will be implemented on-site with the methodology of on-the-job training: the staff of the TARILSP will be “shadowed” and coached by the EU public experts mobilized by SOCIEUX+ for the analysis of the data collected. This way, the EU public experts mobilized by SOCIEUX+ will exchange skills, tools and guidance with the TARILSP on how to define, organize, and comprehend the gathered information and TARILSP’s staff will increase their knowledge while learning by experience.

A final workshop could be envisaged to share all the results of the on-the-job training experience and give some general recommendations and suggestions on data analysis and visualization. Experts and the partner will also jointly develop recommendations and suggestions for policies for single elderlies, while showcasing **EU best practices and cases with regards to pension adequacy for elderlies**.

The following topics could be considered (these topics cannot be considered an exhaustive list; they will be specified in the intermediate deliverables):

- Calculation of pension benefits
- voluntary saving for retirement
- statutory retirement age
- expanding coverage of social security systems
- different pensions systems architecture

At the end of this activity, through the peer-to-peer exchange, the TARILSP staff would have acquired a better overview on the issue of pension adequacy for single elderlies.

The principal target group will be the five (5) researchers of the Training, Assessment and Research Institute of Labor and Social Protection (TARILSP), involved in the survey: one economist, one lawyer, one sociologist, one coming from the business administration and the one from public administration and management.

This second activity is foreseen to be implemented on site.

To ensure mutual understanding during implementation, translation and interpretation from Mongolian to English and vice versa would also be necessary throughout the mission.

SOCIEUX+ will provide consecutive interpretation for the on-site mission while the TARILSP will provide interpretation for the on-line preparatory meetings between the experts’ team and the focal person appointed by the Partner.

Responsibilities:

- UE experts mobilized by SOCIEUX+:

The mission shall be implemented on site in Ulan Baatar.

The principal expert will lead the mission onsite. He/she is responsible for the production of all deliverables of the activity. 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 (TARILSP), to be discussed and validated ahead of the mission.

- Partner Institution (TARILSP):

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

The TARILSP 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 workshops and other peer-to-peer exchanges, and ensuring their participation, including that of external stakeholders if relevant
- the provision of a list of participants to the final workshop
- the TARISLP will support SOCIEUX+ in identifying interpreters/translators English/Mongolian/English
- the TARISLP will provide interpretation for the preparatory meetings and debriefings with the experts mobilized by SOCIEUX+
- Translation of relevant written documents will be covered by SOCIEUX+.

Tasks:

The main tasks of the mission team include:

Preparation phase – ON-LINE

- **Task #1** – Ahead of the mission, to get substantial knowledge of the local context; review any relevant background documents provided by the SOCIEUX+ Team and/or the Partner. The experts will familiarise themselves with the different templates and evaluation forms provided by the SOCIEUX+ Team.
- **Task #2** - Preliminary contacts with the Partner in view of the preparation of the mission's methodology and agenda.
- **Task #3** - A briefing meeting will be organised between the experts and the SOCIEUX+ team prior to the mission. The purpose of this meeting will be to validate the intermediate deliverables, which will have to be approved by the SOCIEUX+ team, as well as to clarify any other aspects to be taken into account. This includes possibilities in terms of production of communication materials and knowledge management. A separate meeting could be arranged with the SOCIEUX+ communications specialist and/or the knowledge development specialist, as appropriate.
- **Task #4** - contact the Delegation of the European Union in Mongolia to arrange a meeting (briefing and/or debriefing depending on the interest of the EUD).
- **Task #5** – Settle the logistical arrangements with SOCIEUX+ for the implementation of the activity (visa, plane arrangements...).

Implementation phase – ON SITE (*The details of this phase will follow the methodology and agenda prepared beforehand*):

- **Task #1** – to conduct consultations with the Partner's executives and staffs, as well as any other relevant actors who can support the positive deployment of the mission.
- **Task #2** – in collaboration with the TARISLP, prepare all relevant documents for the realization of the on-the-job trainings. Since all the material will be translated from English to Mongolian, it will be important to stick to the agenda of the activity agreed between the TARISLP, the experts and SOCIEUX+.
- **Task #3** – to organize and animate the on-the-job training sessions, providing EU examples whenever possible.
- **Task #4** – to conduct consultations with the Partner's executives and staffs, as well as any other relevant actors who can support the activity.
- **Task #5** - to compile a report that formulates a policy-oriented analysis of data collected.
- **Task #6** – The experts will invite the participants of the on-the-job training sessions to complete the online evaluation forms ([PAF](#)) in English. The actual compilation of these questionnaires by the participants is however not the responsibility of the experts.
- **Task #7** – To 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 finalization.

- **Task #8** – The experts will be available for a briefing and/or debriefing meetings with the EU Delegation in Ulaan Baatar.
- **Task #9** – Depending on the visibility and/or knowledge development possibilities identified during the preparation with the SOCIEUX+ team, the experts will be able to transmit to SOCIEUX+ any useful material to inform the public about the activity (photos, interviews, notes or articles), as well as making short videos presenting the actors involved, the activity and the results, if necessary.

Reporting phase – ON-LINE

- **Task #1** - Finalisation of the deliverables of the activity; experts may be invited to make changes/additions to the deliverables, taking into account the Partner's feedback.
- **Task #2** - Experts will complete additionally an Expert Mission Report (ExMR) and a Feedback Form (ExF), to be shared only with SOCIEUX+.

4.2 Deliverables

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 – Activity #1

- **a) An individual Expert Mission Report (ExMR)** in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX+. The expert team may also submit a single-joint ExMR report if they prefer to do so (see instructions on the template).
- **b) An individual Expert Feedback Form (ExF)** completed online (see instructions and link on the ExMR template).
- **c) A collective Activity Report (AcR)** in SOCIEUX+ format (template provided). This AcR is to be produced jointly by the mission team. It is intended for the Partner Institution, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- **D1.1 - Annex 1 of the AcR: Technical report:** An analysis of tools and sampling for the data collection for survey on pension adequacy, with a focus on single elderlies, with recommendations.
- **D1.2 - Annex 2 of the AcR:** A compendium of the presentation of the EU best practices in the area of pension adequacy (PPT presentation, videos, studies...).

4.2.3 Final deliverables – Activity #2

- **a) An individual Expert Mission Report (ExMR)** in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX+. The expert team may also submit a single-joint ExMR report if they prefer to do so (see instructions on the template).
- **b): An individual Expert Feedback Form (ExF)** completed online (see instructions and link on the ExMR template).

- **c) A collective Activity Report (AcR)** in SOCIEUX+ format (template provided). This AcR is to be produced jointly by the mission team. It is intended for the Partner Institution, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- **D2.1 - Annex 1 of the AcR:** Technical report: An analysis and visualization of the data collected on single elderly
- **D2.2 - Annex 2 of the AcR:** Technical report: A list of recommendations/suggestions on pensions for single elderly, with a focus on pension adequacy.

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): Expert in qualitative and quantitative research and analysis (pension adequacy)

- **Area(s) of expertise:** Old age benefits (E.10.06) / Social Protection (E.00) /Pension Schemes (E.10.07), Survey (V.12), Data collecting (V.10), Data analysis (V.05)
- **Specific skill(s) of expertise:** Policy & Strategy making and development (1.2); Quantitative methods (9.1), Qualitative methods (9.2)

Requirements (essential/required):

- University level (Masters or PhD relating to the subject are considered a plus)
- At least 10 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society;
- Relevant experience in conducting qualitative and quantitative research and analysis, especially on pension adequacy.
- Significant experience and proved capacities in conducting survey for public 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 Asia

Expert n°2: Pension Schemes

- **Area(s) of expertise:** Old age benefits (E.10.06) / Social Protection (E.00) /Pension Schemes (E.10.07),
- **Specific skill(s) of expertise:** Policy & Strategy making and development (1.2)

Requirements (essential/required):

- University level (Masters or PhD relating to the subject are considered a plus)

- Between 5 and 10 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society;
- Knowledge of EU pension legislation and policies
- Deep knowledge in the field of contributory pensions, current EU Directives and Regulations in the field of contributory pensions
- Experience providing practical expertise and technical advice for public administration;
- 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 Asia

6.2 Estimated workload

Activity #1	Preparation	On-line work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	5	8	0	4	17
Expert (#2)	4	8	0	3	15
Total	9	16	0	7	32
Activity #2	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	5	10	2	4	21
Expert (#2)	4	10	2	3	19
Total	9	20	4	7	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 by⁶:

⁶ SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

- 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 format⁷.
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+.

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

7.5 Travel costs

All travel expenses for the mobilized 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+. These 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

Conditions to enter to Mongolia

COVID-19 restrictions:

The Mongolian authorities have lifted some health restrictions on entry into Mongolia. However, barrier measures (wearing a mask and regular hand washing) are still strongly recommended.

Travellers arriving in Mongolia are no longer required to undergo a PCR or Covid-19 antigen test, nor are they required to have a complete Covid-19 vaccination schedule. Passengers are required to complete a medical form upon arrival at the border checkpoint.

Note that the land borders with China and Russia remain closed to travellers (with some exceptions). Only arrival via Chinghis Khaan Airport (UBN) is possible for travellers.

Visas:

Many different types of visas are available, depending on the conditions of stay. Multiple entry visas can also be issued. The visa affixed to a passport or the e-visa, granted in advance of travel, is necessary in order to be able to present oneself at the immigration control at the entrance to Mongolia.

Foreigners must register with the Immigration, Naturalization and Aliens Agency within 7 days of arrival in Mongolia.

11 ANNEXES

N/A

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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 established and funded by the EU through the European Commission's Directorate for International Partnerships (DG INTPA). The Facility is co-funded by France, Spain, and Belgium. It is implemented by a partnership composed of 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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