

# TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** SOCIEUX 2022-32 TANZANIA

**Action title:** Cost-benefit analysis of options for the provision of rehabilitation services

**Partner institution:** Workers Compensation Fund (WCF)

**Activity number and title:**

- A. 1:** Formalization of the technical framework for the cost-benefit analysis and identification of options for rehabilitation service delivery
- A. 2:** Costs-benefits analysis
- A. 3:** Finalization of the rehabilitation strategy

**Date of implementation of activities:**

*Activity 1: March, 20 – April, 22, 2023 (remote)*

*Activity 2: May, 22 – July, 7, 2023 (on-site mission 5-16/06/2023 - TBC)*

*Activity 3: August, 17 – September, 30, 2023 (on-site mission dates tbd)*

**Expert positions and responsibilities (by activity):**

**Principal expert (Expert 1):** Rehabilitation; Occupational Safety and Health

4.1. Planning, budgeting & costing; 4.2. Financial management, control and audit

**Expert 2:** Rehabilitation; Occupational Safety and Health

4.1. Planning, budgeting & costing; 3.6. Service delivery

*The same principal expert will be mobilized for the three activities.  
For Expert 2 please refer to specific terms of references for each activity.*

**Workload:**

Expert 1 (principal) : 53 days (17+20+16) including two on-site missions (10+7 days)

**Call for experts' reference:** 22-32/TNZ/1-2-3

**Version - #:** 2 ☒ Draft

☐ Final

**Date:** 30 January 2023

## 1 BACKGROUND INFORMATION

### 1.1 Country overview

In 1964, Tanganyika united with the Island of Zanzibar to form the United Republic of Tanzania, the largest in the East African region, bordered by Kenya and Uganda to the North, Rwanda, Burundi and the Democratic Republic of Congo to the West and Zambia, Malawi and Mozambique to the South. Tanzania has a population of around 63 million people (2021 figures), and growing. While the official capital is Dodoma, the largest city, chief port, major economic and transportation hub and de facto capital, is Dar es Salaam. Spoken languages are Swahili and English (both official), Arabic (widely spoken in Zanzibar).

Tanzania has been spared the internal strife that has blighted many African states. Unfortunately, domestic stability has not translated into economic prosperity for Tanzanians. Despite efforts between 2007 and 2016 that have reduced the country's poverty rate from 34.4% to 26.8%, the absolute number of poor people has held at about 13 million due to high population growth, although the country has had some success in wooing donors and investors. Tanzania is a developing country and its economy depends heavily on agriculture. The sector accounts for more than 40% of GDP, provides 85% of the country's exports and employs 80% of the total workforce. Apart from the agricultural sector, tourism, mining and small-scale industries are increasingly contributing to the national economic growth.

### 1.2 Sector situation

The setup of the social security in Tanzania has adopted a three-pillar model made-up of social assistance, mandatory social insurance and voluntary private insurance, established into the National Social Security Policy of 2003. Social assistance is offered to marginalized citizenry and special groups. Prominent programs in this pillar include those administered by the Tanzania Social Action Fund (TASAF) providing cash transfers and public work to poor residents. Currently, it is estimated that out of the total population of around 63 million people, social assistance covers (under Productive social safety net (PSSN) project) slightly above 1 million poor households with approximately 6 million beneficiaries in total.<sup>1</sup> The 2<sup>nd</sup> pillar focuses mainly on the workforce in the formal and informal sector, with employers and the self-employed contributing to social security schemes on compulsory, monthly/regular basis. Statistics show that coverage under this arrangement is at around 11% of the labour force. Individuals covered are mainly rights-holders of the country's mandatory social security schemes, such as the National Social Security Fund (NSSF), the Public Service Social Security Fund (PSSSF), the National Health Insurance Fund (NHIF) and the Workers Compensation Fund (WCF). Through the Social Security reform of 2018, the National Social Security Fund (NSSF) acquired a legal mandate to extend social security coverage to informal sector's workers. The 3<sup>rd</sup> pillar encompasses voluntary contributions over and above the mandatory arrangements. Voluntary contributions are still low due to various reasons including low saving culture among people.

Despite major progress that has been realized so far - such as the merger of four social security funds into one, and the establishment of the WCF in 2015 - a number of challenges remain. It is estimated that over 80% of the Tanzanian population is not covered by social security programs. Most of those lacking social security coverage are in the informal sector and are in majority rural habitants. Adequacy of benefits provided is another challenge that constraints social security outcomes.

### 1.3 Role of partner institution in the sector

For the sector of employment injury protection, appropriate legal regulations were passed (in particular the Occupational Health and Safety Act No. 5 of 2003; Workers' Compensation Act No. 20 of 2008, but also some other acts as the Employment and Labour Relation Act No. 6 of 2004

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<sup>1</sup> <https://documents1.worldbank.org/curated/pt/999381538657815182/pdf/PER-P161653-ADD-VC-PER-PUBLIC-TZ-SP-PER-Final.pdf>

and the Mining Act of 2010). The WCF has been established only in 2015 . It is self-governed by a tripartite board under the framework of the law. The number of staff and their occupational skills seem to be appropriate to the tasks of the WCF, even if there is still a lack of staff, particularly with regards to rehabilitation functions. Adhesion to WCF is very significant among large firms and factories, less so, but still important, for smaller enterprises. Most of the registered establishments pay their contributions (1 % of the wages) in a reliable and steady matter. The WCF has to pay benefits only to the newly injured persons, not for cases happened before the establishment of the WCF). Therefore, the WCF can count on more revenues than those needed for the current expenses. So, in the current phase, the WCF can place money to the bank or to funds, but the loads from the past and the loads caused by new cases will grow in the future.

Among the main challenges faced by the WCF the following should be mentioned:

- Partial provision of rehabilitation services due to lack of guidelines for the provision of vocational and social rehabilitation. This limits the scope of rehabilitation services provision despite the fact that the law allows for a comprehensive rehabilitation services comprising of social rehabilitation, clinical rehabilitation as well as vocational rehabilitation.
- Inadequate awareness among employers, employees and other stakeholders on Workers Compensation matters including their rights and obligations to the Fund. This places pressure to the Fund to engage the public with various programs in order to raise awareness.
- Low compliance among employers on registration and submission of contributions to the Fund
- Need to further improve the knowledge of WCF staff and external professionals on Workers Compensation and social insurance matters.
- Limited presence of the Fund in up-country offices. To start with, the Fund has established 10 offices in major towns by considering geographical spread of our stakeholders. To operate more effectively, further expansion is required in order to enhance accessibility.
- Limited utilization of the ICT systems and infrastructure by stakeholders. The Fund has invested sufficiently in the ICT systems and infrastructure. Currently, over 85% of the WCF services are available through online channels. However, some employers do not take advantage of the existing systems .

## **2 ACTION DESCRIPTION**

### **2.1 Overall objective**

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

### **2.2 Specific objective (s) (purpose)**

S. 1: To efficiently deliver rehabilitation services to the victims of occupational accidents and/or diseases as per the mandate of WCF

### **2.3 Expected results**

R. 1: WCF understands the costs and benefits of different options for providing rehabilitation services to its right-holders

R. 2: The WCF is supported in achievement of strategic decision on practical organization of rehabilitation services delivery to the victims of occupational accidents and/or diseases as per the mandate of WCF

### **2.4 Final deliverables**

D1.1: Theoretical framework and methodology for cost-benefit analysis

D1.2: Formalized list of external rehabilitation providers to be included in the cost-benefits analysis

D. 2: Technical report identifying comparative costs and benefits of the options available to WCF for rehabilitation services' provision

D. 3: Orientation paper with recommendations for the implementation of the selected option(s) and finalization of the rehabilitation strategy

### 3 METHODOLOGY

#### 3.1 General methodology (of the action)

The proposed action aims to support Partner Institution - Workers Compensation Fund of Tanzania (WCF) - in the identification of the best option available to deploy rehabilitation services to entitled persons (insured employees - victims of occupational accidents and diseases). To this purpose, a three-steps approach is proposed: first, setting up the theoretical framework for cost-benefit analysis that shall be used to assess the external entities and facilities that provide rehabilitation services and are known to the Partner; secondly, the conduct of the cost-benefit analysis itself based on the established theoretical framework and a due consideration of demand and supply (the supply capacity of the identified entities and structures, as well as the available data relating with incidence, typology and severity of work-related injuries and diseases). As last step, experts and the partner will agree on the results of the analysis for the Board to take a final decision about what option to adopt for ensuring a proper and timely provision of rehabilitation services to rights-holders. The adopted modality shall be integrated into the WCF's rehabilitation strategy (previously prepared within the framework of SOCIEUX+ Action 2019-35).

The technical assistance methodology will be detailed by the mobilized experts. Notwithstanding this experts' responsibility, the overall methodology shall be centred on the international standards and EU best practice in the field of organization of rehabilitation services provision to the victims of occupational diseases and accidents. The experts shall take into account the work that has been done so far by the Partner institution, including during previous SOCIEUX+ Actions, and follow the peer-to-peer approach in their work with the Partner institution.

#### 3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- A. 1: Formalization of the technical framework for the cost-benefit analysis and identification of options for rehabilitation service delivery
- A. 2: Costs-benefits analysis
- A. 3: Finalization of the rehabilitation strategy

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

- Activities 1, 2 and 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;
- 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

The action includes three activities.

##### **For activity 1:**

The first activity will be performed at distance and is a necessary preparatory step before the cost-benefit analysis itself be implemented. This stage is needed to ensure that the necessary conditions for a conclusive analysis exist, including a mapping of facilities and options to be costed and available (quantity and qualitative) data referring to the capacity of those identified structures to provide rehabilitation services. This activity shall result in a solid methodological base for cost-benefit analysis to be conducted onsite during activity 2. Through the deployment of a peer-to-peer approach, it will consist of:

- assisting the Partner Institution in finalizing a list of available external options for rehabilitation services provision to be considered in cost-benefit analysis, inasmuch consistent data on the rehabilitation services' capacity of each option (facility) is available;
- analysing available data on the actual need of rehabilitation services (demand side), according to actual and perspective cases and a quantitative and qualitative analysis of the average demand received by WCF;
- setting up a theoretical framework to be applied to the cost-benefit analysis, based on pre-defined objectives, specific quality and technical requirements and criteria;
- the option of a direct provision of rehabilitation services by the WCF, through the set-up and deployment of an internal structure that shall be capable to address the quantitative and qualitative needs of injured and sick workers, shall also be considered and adequately included in the theoretical framework for the cost-benefit analysis.

It shall be underlined that this activity and the entire Action will be feasible only if the fundamental conditions to conduct a cost-benefit analysis are present, namely: the availability of a "short-list" of rehabilitation services' providers that will be assessed during the cost-benefit analysis, the availability of substantial information and relevant data for each option (provider) included in the short-list, which are necessary to conduct a consistent cost-benefit analysis, the availability of data on the demand-side, namely a quantitative and qualitative assessment of average and perspective rehabilitation needs of WCF's rights-holders. The non-existence of such basic conditions may become a reason for the suspension of the peer-to-peer cooperation, until the moment in which those data and information are collected and will be made available by the Partner Institution.

The activity will result in (1) the establishment of a theoretical and methodological framework for cost-benefit analysis and (2) the formalization of a reviewed and appraised list of external rehabilitation providers, and relevant data and information pertaining to their capacity to offer rehabilitation services, to be included in the cost-benefits analysis.

As it is primarily oriented to collect and review existing data and construct a theoretical framework for cost-benefits analysis, the activity is foreseen to be implemented remotely; no on-site mission is planned.

### **For Activity 2:**

The second activity serves the purpose of conducting a formal cost-benefits analysis of the options of rehabilitation service provision identified previously. It will follow the theoretical and methodological framework agreed during activity 1 and employ the information of data referring to each provider, facilitated by the Partner Institution. This activity involves an on-site mission to ensure smooth peer-to-peer cooperation, rapid access to information, on-site observation and interviews with relevant informants outside WCF and, ultimately, well-grounded results of the costs-benefits analysis. The experts will do field visits to rehabilitation facilities selected previously, conduct interviews, identify direct, indirect, and opportunity costs of each option as well as possible direct and indirect benefits. The location of existing facilities, quality of services, possible volume of services they can provide etc. shall be assessed.

The activity will result in the availability of an agreed cost-benefit analysis (CBA) report identifying comparative costs and benefits of the options available to WCF for rehabilitation services provision. The CBA report shall assess the net benefits accruing to WCF and its right-holders from each option identified. The CBA report shall consider the flow of real resource costs and benefits, but also attempt to measure the value of all costs and benefits that are expected to result from the activity. It shall furthermore include an estimation of costs and benefits which are 'unpriced' and not the subject of normal market transactions, but which nevertheless entail the use of real resources. The report shall include a determination of scope and objectives, identification of constraints, costs and benefits assessed, and duly consider equity issues.

**For Activity 3:**

Activity three aims to the finalization of the WCF's rehabilitation Strategy by including the option(s) selected for rehabilitation services delivery as result of the costs-benefits analysis. Experts will present the cost-benefit analysis to WCF's management and the Board, assist in taking a final decision on the best option to adopt and the practical organization of the way forward (implementation on the decision), through the finalization of the "rehabilitation strategy" document, which was established with SOCIEUX+ support during Action 2019-35.

This activity will allow to achieve the Acton's final deliverable, namely a technical report identifying the chosen option(s) based on the cost-benefits analyses and recommendations in view of the implementation of the selected option(s), which shall be annexed to the existing rehabilitation strategy.

At this stage the activity is foreseen on-site; if needed, online cooperation can be considered later.

**For each activity, expectations from the Experts' team and Partner institutions are the following:****Experts' team:**

The principal expert will lead the remote/on-site mission. 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 conduct the activity by means of remote or on-site meetings with the Partner Institution and relevant stakeholders, 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:

- providing or more resource-persons to support the experts in the material and technical organisation, as well as in brainstorming sessions and in elaboration of recommendations (a primary list of existing options/facilities for rehabilitation service delivery should be provided)
- 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 premises and logistics) if needed.

**Tasks:**

Minimum tasks expected from the experts shall include:

- Ahead of the mission (remote or onsite) to get substantial knowledge of the local context; review any relevant background documents provided by the SOCIEUX+ Team and/or the Partner;
- Conduct preliminary contacts with the Partner in view of the preparation of the remote mission's methodology and agenda, to be transmitted ahead of the mission to the SOCIEUX+ team for approval;
- Take part to the pre-mission briefing with SOCIEUX+ team (around 1 week before the start of the mission);
- Prepare the methodological note, establish the agenda and create the methodological tools to carry out the activity;
- During the mission, to conduct consultations with the Partner's executives and staffs, as well as any other external actor that can support the positive deployment of the mission;
- To make themselves available for a meeting with the EU Delegation office in Tanzania ;
- 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;



- At the end of the mission, timely submit to SOCIEUX+ of the final deliverables (10 working days after the mission), and be available to go through an eventual round of comments and adjustments in interaction with SOCIEUX+ and the Partner;
- To channel to SOCIEUX+ Communication officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).
- To employ the different templates and evaluation forms provided by the SOCIEUX+ team

## 4.2 Deliverables

### 4.2.1 ***Pre-mission deliverables for each activity (to be transmitted to SOCIEUX+ FMT at least three working days ahead of each activity):***

- 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: An activity 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 (to be transmitted to SOCIEUX+ FMT no later than ten days after the activity's completion):***

#### **Technical deliverables for Activity 1:**

- D1.1: Theoretical framework and methodology for cost-benefit analysis. Experts and the partner shall establish a methodology for conducting a cost-benefits analysis of the various options available for the provision of rehabilitation services to WCF's right-holders, including that of a direct provision by WCF through the constitution of internal facilities and capacities. The CBA methodology should cover at least the following areas: general description of the services to be provided, list of alternative options and relevant quantitative and qualitative data, identify benefits and costs linked to the delivery of rehabilitation services for each option, comparison of alternatives, sensitivity analysis.
- D1.2: Formalized list of external rehabilitation providers to be included in the cost-benefits analysis. The list can be presented as an annex to the CBA methodology.

#### **Technical deliverable for Activity 2:**

- D. 2: Technical report (Cost-benefits analysis – CBA report) identifying comparative costs and benefits of the options available to WCF for rehabilitation services' provision. The CBA report shall cover at least the above-mentioned areas built-up in the methodology.

#### **Technical deliverable for Activity 3:**

- D. 3: Orientation paper with recommendations for the implementation of the selected option(s) and finalization of the rehabilitation strategy.

#### **Also for each of the three activities:**

- AcR: A collective Activity Report 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 in during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- ExMR: An individual Expert Mission Report 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).
- ExF: An individual completed Expert Feedback Form completed online (see instructions and link on the ExMR template).

## 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 3 working days before the start of activity.
- 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(s) of expertise:** Rehabilitation; Occupational Safety and Health

**Specific skill(s) and competency(ies) of expertise:**

4.1.Planning, budgeting & costing; 4.2.Financial management, control and audit

### **Requirements (essential/required):**

- a) The education type and level required:  
"Master's" degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master's degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:
- An intermediate academic degree ("Bachelor", equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
  - A first-level academic degree ("License", equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.
- The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.
- b) The number of years of relevant work/professional experience within EU public administrations or academia combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):  
Seven (7) years.
- c) Other essential qualification(s):
- Relevant experience in the area of organization of rehabilitation facilities, in implementation and cost assessment of rehabilitation service provision;
  - Previous experience in conduct of cost-benefit analysis in rehabilitation services provision and/or OSH facilities and/or healthcare;
  - Particular knowledge of problematics related to rehabilitation of persons victims of work injuries and/or occupational diseases
  - Acute sense of diplomacy and institutional relations.

### **Additional assets (advantageous in selection):**

- fluency in English, written and oral
- Previous experience of technical assistance;
- Computer fluency (Zoom, PowerPoint etc.) and good presentation skills.

### **For information, Expert 2:**

**Area(s) of expertise:** Rehabilitation; Occupational Safety and Health

**Specific skill(s) of expertise:**

4.1. Planning, budgeting & costing; 3.6.Service delivery

### **Requirements (essential/required):**

- a) The education type and level required:  
"Bachelor's" degree (or equivalent academic degree or diploma requiring three (3) years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the bachelor's degree can be replaced by a combination of:

- o A first-level academic degree ("License" or equivalent) with an additional two (2) years of professional experience in one or more relevant fields.  
The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.
- b) The number of years of relevant work/professional experience within EU public administrations or academia combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):  
Five (5) years.
- c) Required language knowledge: fluency in English, written and oral;
- d) Other essential qualification(s):
  - o Relevant experience in the area of organization, implementation and cost assessment of rehabilitation service provision;
  - o Knowledge of methodologies and principles of cost-benefit analysis in rehabilitation services provision and/or OSH facilities and/or healthcare;
  - o Experience in social security administration in the area of rehabilitation of persons victims of work injuries and/or occupational diseases
  - o Acute sense of diplomacy and institutional relations.

**Additional assets (advantageous in selection):**

- Previous experience of technical assistance;
- Computer fluency (Zoom, PowerPoint etc.) and good presentation skills.

## 6.2 Estimated workload

### Activity 1 (Distance work)

|                       | Preparation | Remote work | Reporting & deliverables | Total     |
|-----------------------|-------------|-------------|--------------------------|-----------|
| Principal expert (#1) | 3           | 10          | 4                        | 17        |
| Expert (#2)           | 3           | 10          | 3                        | 16        |
| <b>Total experts</b>  | <b>6</b>    | <b>20</b>   | <b>6</b>                 | <b>33</b> |

### Activity 2

|                       | Preparation | Onsite work | Reporting & deliverables | Travel   | Total     |
|-----------------------|-------------|-------------|--------------------------|----------|-----------|
| Principal expert (#1) | 3           | 10          | 5                        | 2        | 20        |
| Expert (#2)           | 3           | 10          | 4                        | 2        | 19        |
| <b>Total experts</b>  | <b>6</b>    | <b>20</b>   | <b>9</b>                 | <b>4</b> | <b>39</b> |

### Activity 3:

|                       | Preparation | Onsite work | Travel   | Reporting & deliverables | Total     |
|-----------------------|-------------|-------------|----------|--------------------------|-----------|
| Principal expert (#1) | 3           | 7           | 2        | 4                        | 16        |
| Expert (#2)           | 3           | 7           | 2        | 3                        | 15        |
| <b>Total experts</b>  | <b>6</b>    | <b>14</b>   | <b>4</b> | <b>7</b>                 | <b>31</b> |

## 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 by<sup>2</sup>:
  - 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 format<sup>3</sup>.
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](mailto: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](mailto: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](http://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

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<sup>2</sup>SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

<sup>3</sup>Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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.

## 7.5 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

# 11 ANNEXES



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## ABOUT SOCIEUX+

The SOCIEUX+ Facility was established and funded by the EU through the European Commission's Directorate-General for International Partnerships (DG INTPA) and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). 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 Facility's general objective is to expand and improve access to better employment opportunities and inclusive Social Protection systems in Partner Countries. Its specific objective is to enhance Partner Countries' capacity to 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 EU initiatives.

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

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