

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2023-22 NORTH MACEDONIA*

Action title: Development of Strategic Plan for the Employment Service Agency of the Republic of North Macedonia

Partner institution: Employment Service Agency of the Republic of North Macedonia (ESARNM)

Activities numbers and titles:

- Activity #1 – *Identifying the objectives and targets of the 3-years strategic plan*
- Activity #2 – *Elaboration of a final draft version of the 3-years strategic plan for the ESARNM (2024-2026)*

Tentative dates of implementation and location:

- Activity #1 – July 17th to August 11th, 2023 (with on-site mission in Skopje from July 31st to August 4th, 2023)
- Activity #2 – August 16th to September 15th 2023 (on-line)

Expert positions and responsibilities (by activity):

- Activities #1 and #2: Expert #1 (*principal*) – *Expert in strategic planning (finance-oriented)*
- Activities #1 and #2: Expert #2 – *Expert in strategic planning (change management-oriented and M&E)*

Workload:

Activity #1 - Expert #1: Total 13 days (8 days at distance; and 5 days onsite)

Activity #1 - Expert #2: Total 11 days (6 days at distance; and 5 days onsite)

Activity #2 - Expert #1: Total 13 days (13 days at distance)

Activity #2 - Expert #2: Total 11 days (13 days at distance)

Call for experts' reference: 23-22/NMA/1/1, 23-22/NMA/1/2, 23-22/NMA/2/1 and 23-22/NMA/2/2

Version - #: 1

☒ Draft

☐ Final

Date: June 7th, 2023

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1 BACKGROUND INFORMATION

1.1 Country overview

With a population of around 2 million in 2020¹, North Macedonia is a landlocked country of the south-central Balkans. It is bordered to the north by Kosovo and Serbia, to the east by Bulgaria, to the south by Greece, and to the west by Albania. The capital is Skopje. Languages include Macedonian, Albanian, plus Turkish, Romani, Serbian, Bosnian, Aromanian.

Stevo Pendarovski won the 2019 presidential election as a candidate of the Social Democratic Union of Macedonia and the Democratic Union for Integration. He won 51.6% of the votes cast in the second round of the election. Pendarovski defeated the nationalist candidate Gordana Siljanovska-Davkova. North Macedonia's presidents are directly elected for a five-year term. The president appoints the prime minister, and legislative power is vested in parliament.

With a GDP growth of 4% in 2021², the Republic of North Macedonia knows an economic development. The unemployment rate was at 15.2 % in the last quarter of 2021, the lowest level since the country's independence, mainly due to the COVID-19 crisis.

North Macedonia applied for EU membership in March 2004 and was granted EU candidate status in December 2005. The EU held its first intergovernmental conference with North Macedonia in July 2022.

1.2 Sector situation

In North Macedonia, there is a clear need to strengthen national systems of employment services and national policies to provide quality employment services for workers and employers to mitigate crisis-induced economic and labour market disruption. In order to manage this global crisis, it is ever more important to have a holistic approach towards employment, meaning implementing employment policies that tackle the demand and supply side of the labour market while improving employment services. The Employment Service Agency of the Republic of North Macedonia (ESARNM) designs and implements labour market policies which are part and parcel of the overall employment policy of the government.

Furthermore, following the national legislation (Law on Budgets from 2022), the budget users in North Macedonia, must prepare a three-year strategic plan that contains programs and activities for the realization of the strategic priorities of the Government of the Republic of North Macedonia, that should not exceed the maximum amounts of funds allocated for the next three fiscal years determined by the Government of the Republic North Macedonia. The strategic plans are submitted to the Ministry of Finance.

Regarding the Chapter 19 'Social policy and employment' of the EU enlargement process³, the 2022 recommendations⁴ pointed out that "the country should, in particular, continue to implement labour market activation measures for young, long-term and low skilled unemployed people, including women, persons with disabilities and Roma, and ensure proper evaluation of the measures. [...] The Employment Service Agency's capacity should be strengthened, in particular in order to better deliver on active labour market measures, the Youth Guarantee Scheme, the newly adopted policy measures targeting the negative effects of COVID-19 and their monitoring, evaluation and impact assessment".

1.3 Role of partner institution in the sector

The Employment Service Agency of the Republic of North Macedonia (ESARM) is a public institution that operates on basis of several laws and bylaws, strategies, action plans and programs that refer to various segments of the labour market. Some of the important documents, are the following:

- The Statute;

¹ Data from the World Bank: <https://data.worldbank.org/indicator/SP.POP.TOTL?locations=MK>

² <https://data.worldbank.org/country/north-macedonia>

³ https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/conditions-membership/chapters-acquis_en

⁴ <https://neighbourhood-enlargement.ec.europa.eu/system/files/2022-10/North%20Macedonia%20Report%202022.pdf>

- The annual work program of the ESARNM;
- Law on employment and insurance in case of unemployment;
- Law on labour relations;
- Law on employment of disabled persons;
- Law on employment and work of foreigners;
- National employment strategy;
- Plan for Implementation of Youth Guarantee, etc.

The main activities of the ESARNM are: Job Mediation, employment counselling, professional orientation, Unemployment insurance, implementation of active employment programs and measures, issuance of a personal work permit for foreigners and an opinion on the use of the quota and the current needs of the labour market in the Republic of North Macedonia, creation of analytical, development and professional materials within the scope of ESARNM, information on the labour market that are important for the public.

The main goal of ESARNM, as a public institution, is to function as a labour exchange and to be the key mediator for linking the supply and demand of labour. Thus, ESARNM has a significant role in improving the functionality of the labour market in the country. At the same time, ESARNM aims to contribute to decreasing the structural mismatch between supply and demand on the labour market.

The governance structure includes two organs: a Managing Board and a Director.

The Management board of the Agency is composed of nine members from the ranks of professionals with knowledge or experience in the field of employment, five of whom are appointed by the Government of the Republic of North Macedonia, and two representatives are appointed by the employers' organization and the representative trade union. for a period of four years, with the right to re-election.

The Director of the ESARNM is appointed by the Government, at the proposal of the Minister of labour and social policy. The Director organizes and manages the work, independently makes decisions within the scope of his competence, represents the Agency before third parties and is responsible for the legality of its work.

ESARNM's mission is in line with Law on Employment and Insurance in the Case of Unemployment which defines the main functions of the Agency as a public sector entity.

ESARNM's planning process includes a centralized preparation of Annual Work Programmes, taking into account the Operational plan for the active employment measures and programmes which is adopted by the Government.

As part of its annual planning process ESARNM defines mid-term objectives which serve as the basis for further defining the annual objectives, tasks and activities.

2 ACTION DESCRIPTION

2.1 Overall objective

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

2.2 Specific objective (s) (purpose)

- SO1: To reinforce the ESARNM capacity to operationally implement the National Employment Strategy 2021-2027.

2.3 Expected results

- R1: The 3-years strategic plan of the Employment Service Agency of North Macedonia (ESARM) is developed.

2.4 Final deliverables

- D1.1: An analytical note identifying the objectives and targets of the 3-years strategic plan for the ESARNM, including a rationale for recommendations on future necessary changes.

- D1.2: Recommendations on the structure for the 3-years strategic plan
- D2: A final draft version of the 3-years strategic plan for the ESARNM (2024-2026).

3 METHODOLOGY

3.1 General methodology (of the action)

The main focus of this action is **to support the Employment Service Agency of the Republic of North Macedonia to develop a three-year strategic plan**, in line with the national strategies of the North Macedonian Government and the Ministry of Labour and Social Policy on employment.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – Identifying the objectives and targets of the 3-years strategic plan
- Activity 2 – Elaboration of a final draft version of the 3-years strategic plan for the ESARNM (2024-2026)

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

- Activity #1. Identifying the objectives and targets of the 3-years strategic plan
- Activity #2. Elaboration of a final draft version of the 3-years strategic plan for the ESARNM (2024-2026)

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 - Identifying the objectives and targets of the 3-years strategic plan

According to the Law on Budgets⁵ from 2022 Budget Law, the Employment Service Agency of North Macedonia (ESARNM) is legally required to develop a three-year strategic plan, which must be submitted to the Ministry of Finance together with the proposed budget for the respective year.

This 3-year strategic plan (2024-2026) should be submitted during the first half of September 2023.

⁵ Law on Budgets (Official Gazette no. 203, as of 19.09.2022): <https://finance.gov.mk/wp-content/uploads/2022/09/%D0%97%D0%B0%D0%BA%D0%BE%D0%BD-%D0%B7%D0%B0-%D0%91%D1%83%D1%9F%D0%B5%D1%82%D0%B8.pdf>

SOCIEUX+ Action 2023-22 will **support peer-to-peer exchanges for the concrete formulation of a 3-years strategic plan of the Employment Service Agency of North Macedonia (ESARNM)**, by the European public experts mobilized by SOCIEUX+ and the ESARNM.

For the first activity in Skopje, a series of workshops and meetings will be organized with the ESARNM to **jointly identify the objectives and targets** of the 3-years strategic plan for the ESARNM and **elaborate the structure of the 3-years strategic plan**.

The objectives and targets of the strategic plan will be developed through:

- An analysis based on desk research: previous ESARNM's annual plans⁶, the National Employment Strategy 2021-2027⁷, the Law on Employment and Insurance in case of Employment⁸, the Youth Guarantee's Implementation Plan⁹, the Economic Reform Programme 2023-20235¹⁰, etc...)
- interviews with the working group on the strategic plan: ESARNM's heads of sector and Units, from the Ministry of Labour and Social Policy and any other relevant stakeholders....

Actual inconsistencies and areas of future possible improvements for the ESARNM will also be identified, with the elaboration of a rationale for the future necessary changes, in particular regarding to the human resources, in terms of additional needs and skills, to better implement employment policies.

During the mission, while displaying EU models, the experts mobilized by SOCIEUX+ will design a methodology for facilitating peer-to-peer consultations, display EU models and animate all consultations, meetings and workshops together with the Employment Service Agency of North Macedonia (ESARNM). The specific modalities of this interaction will be detailed by experts ahead of their mission, into a methodological note jointly set with the Partner.

The public experts mobilized by SOCIEUX+ will work closely with the working group created for the strategic plan: all the Heads of Sector and Units from ESARNM Central Office and also representatives from the Ministry of Labour and Social Policy and the Ministry of Finance.

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

SOCIEUX+ will provide interpretation for the on-site mission as well as for some on-line meetings.

Responsibilities:

- UE experts mobilized by SOCIEUX+:

The mission shall be implemented on site in Skopje.

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, in collaboration with the other expert.

The experts shall co-develop a proposal for methodology and agenda together with the Partner institution (ESARNM), to be discussed and validated ahead of the mission (for ex: displaying EU models, designing a methodology for facilitating peer-to-peer consultations in Skopje and on-line, etc....)

- Partner Institution (ESARNM):

The Employment Service Agency of North Macedonia (ESARNM) shall work in collaboration with experts supporting the preparation and implementation of the activity.

⁶ 2021 Annual Report of Employment Service Agency of the Republic of North Macedonia
<https://av.gov.mk/content/Документи/Извештаj%20на%20ABPCM%202021.pdf>

⁷ National Employment Strategy 2021-2027 in English:
https://www.mtsp.gov.mk/content/pdf/2021/trud/strategija_vrabotuvanje_2021_eng.pdf

⁸ https://mtsp.gov.mk/content/pdf/trud_2017/pravilnici/16,11-ЗаконОсигурвањеприНевработеност.pdf

⁹ https://www.mtsp.gov.mk/content/MKD_YG_implementation_plan_2020-2022_za_na_Vlada_na_RSM.doc

¹⁰ <https://finance.gov.mk/economic-reform-program/?lang=en>

The ESARNM 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
- establish a working group on the 3-year strategic plan and introduce the experts mobilized by SOCIEUX+ to the working group
- convening participants to the meetings/workshop and ensuring their participation.
- Ensure that meetings' space will be available for the experts mobilized by SOCIEUX+ (SOCIEUX+ cannot support the cost for room rental or any other equipment).

Tasks for the experts mobilized by SOCIEUX+:

The main tasks of the mission team include:

Preparation phase

- **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 mobilized 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 Skopje 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 (travel arrangements, ZOOM license...).

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

- **Task #1** – in collaboration with the ESARNM, prepare all relevant documents for the realization of the activity (questionnaires, scripts for the meetings...)
- **Task #2** – to conduct consultations with the Partner's executives and staffs, as well as any other relevant actors who can support the activity (the working group)
- **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 meeting in Skopje 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

- **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+.

The principal expert will lead the on-site mission. He/she will be responsible for the delivery of all deliverables of the activity (see below Section **Error! Reference source not found.**). He/she will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+.

4.1.2 Activity 2 - Elaboration of a final draft version of the 3-years strategic plan for the ESARNM (2024-2026)

Following the mission in Skopje, a **second activity** will be organized **on-line, via ZOOM**, to finalize the draft version of the 3-years strategic plan for the ESARNM.

As a non-exhausted example, this 3-year strategic plan could contain the following sections:

- Organisation and function of the ESARNM: strategic goals, priorities & targets, staff allocation and dynamic HR management, policy for vulnerable groups (women, youth, person with disabilities...), technological development (digitalisation of services?)
- Missions: support for jobseekers (guidance, soft skills...), training and skills management for jobseekers (and workers?), skills management and recognition, services to employers (services, communication...), public-private partnerships...
- Governance (management tools, indicators, annual performance report, etc.)
- Finances (quantified programmes and activities)
- M&E: General framework for monitoring and evaluation of the strategic plan

At the end of this activity, the staff of the ESARNM will have an overview on how to design and implement a well-structured medium-term strategy based on the highest-level strategic goals as defined by the Government and Ministry of Labour and Social Policy and aligned with the national employment policies.

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

SOCIEUX+ will provide interpretation for the on-line meetings. The final draft version of the Strategic Plan will be translated to Macedonian language.

Responsibilities:

- UE experts mobilized by SOCIEUX+:

The mission shall be implemented on-line via ZOOM.

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, in collaboration with the other expert.

The experts shall co-develop a proposal for methodology and agenda together with the Partner institution (ESARNM), to be discussed and validated ahead of the mission (for ex: displaying EU models, designing a methodology for facilitating peer-to-peer consultations in Skopje and on-line, etc....)

- Partner Institution (ESARNM):

The Employment Service Agency of North Macedonia (ESARNM) shall work in collaboration with experts supporting the preparation and implementation of the activity.

The ESARNM 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
- establish a working group on the 3-year strategic plan and introduce the experts mobilized by SOCIEUX+ to the working group
- convening participants to the meetings/workshop and ensuring their participation.

Tasks for the experts mobilized by SOCIEUX+:

The main tasks of the mission team include:

Preparation phase

- **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 mobilized 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 Skopje to arrange on-line meeting(s) (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 (ZOOM license...).

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

- **Task #1** – together with the ESARNM and the working group, finalize the redaction of the final draft of the 3-year strategic work plan according to the structure agreed in Skopje.
- **Task #2** – 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 #3** – The experts will invite the participants to the on-line sessions to complete the online evaluation forms ([PAE](#)) in English. The actual compilation of these reports by the participants is however not the responsibility of the experts.
- **Task #4** – The experts will be available for an on-line debriefing 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

- **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 for Activity #1 and Activity #2

- 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 for Activity #1

- **A joint Expert Mission Report (ExMR)** in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX (see instructions on the template).
- **An individual Expert Feedback Form (ExF)** completed online (see instructions and link on the ExMR template).
- **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:** An analytical note identifying the objectives and targets of the 3-years strategic plan for the ESARNM, including a rationale for recommendations on future necessary changes.
- **D1.2 – Annex 2 of the AcR:** Recommendations on the structure for the 3-years strategic plan

4.2.3 Final deliverables for Activity #2

- **A joint Expert Mission Report (ExMR)** in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX (see instructions on the template).
- **An individual Expert Feedback Form (ExF)** completed online (see instructions and link on the ExMR template).
- **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 - Annex 1 of the AcR:** A final draft version of the 3-years strategic plan for the ESARNM (2024-2026).

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 writing [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 strategic planning (finance-oriented)

Area(s) of expertise:

- *Employment Services, Human Resources Management & Development, Labour Administration*

Specific skill(s) & competency(ies):

- *Policy & Strategy making and development (1.2); Services delivery (3.6); Planning, budgeting and costing (4.1)*

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) At least seven (7) years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.

- c) Required language knowledge: English

N.B.: Translation and interpretation services may be commissioned by SOCIEUX+.

- d) Other essential qualification(s):

- Experience providing advice to public institutions and/or Public Employment Services in adapting and optimizing their processes and structures, specifically on strategic finance planning
- Experience in supporting Public Employment Services in drawing up their strategic plan and developing strategic management tools
- Experience in training managers on the themes of governance and partnership;

Additional assets (advantageous in selection):

- e) Proven experience in developing and implementing HR policies and good command of skills development issues.
- f) A previous experience in delivering short-term technical assistance in international cooperation;
- g) A previous professional experience in Western Balkans

Expert #2: Expert in strategic planning (change management-oriented and M&E)

Area(s) of expertise:

- *Employment Services, Human Resources Management & Development, Labour Administration*

Specific skill(s) & competence(s):

- *Change management & facilitation (3.4); Policy & Strategy making and development (1.2) Organisational structures, roles and arrangements (3.1); Monitoring & Evaluation (M&E)*

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:

- 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.

h) At least five (5) years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.

b) Required language knowledge: English

N.B.: Translation and interpretation services will be commissioned by SOCIEUX+.

c) Other essential qualification(s):

- Experience providing advice to public institutions and/or Public Employment Services in adapting and optimizing their processes and structures
- Experience in supporting Public Employment Services in drawing up their strategic plan
- Experience in developing monitoring and evaluation framework

Additional assets (advantageous in selection):

- a) A previous experience in delivering short-term technical assistance in international cooperation.
- b) A previous professional experience in Western Balkans.

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Collaborative institutions:

Public or publicly mandated institutions from European Union Member States with relevant expertise and competencies as outlined above are also encouraged to directly apply and contact SOCIEUX+ to provide expertise and participate in these activities. Focal points and responsible staff may directly contact the SOCIEUX+ Team at: experts@socieux.eu, indicating the reference of the call for experts.

6.2 Estimated workload¹¹

Activity #1	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	4	5	/	4	13
Expert (#2)	3	5	/	3	11
Total Activity #1	7	10	/	7	24
Activity #2	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	4	/	5	4	13
Expert (#2)	3	/	5	3	11
Total Activity #2	7	/	10	7	24

¹¹ Please note that travel days are not considered as working days.

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+ online 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 by¹²:
 - a. Providing contact details
 - b. Providing information on the competencies, 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 competencies 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 format¹³.
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 if 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 on 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+.

¹² SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

¹³ Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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

Various options for contracting:

- **Active French Public Expert** (Contracted by Expertise France)

Engagement letter (+ Cumulation of activities form signed by the hierarchical superior)

- **Active Spanish Public Expert**

Spanish public experts will be contracted by FIIAPP (letter of designation – signed by the hierarchical superior - and letter of commitment).

- **UE Public Expert** (including French and Spanish retired or private experts)

- Service contract with expert (+ Authorization document from employer indicating the dates of the activity + a tax identification number (TIN) to be able to issue an invoice; or
- Umbrella company: experts who do not have a tax identification number allowing them to invoice for services in their country, but they are authorized to sign temporary employment contracts according to local legislation, or
- Service contract with institution: experts who do not have a tax identification number that allows them to work in their country and cannot sign an employment contract according to local legislation.

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 into public employees for all intents and purposes, benefits and financial compensation are provided by SOCIEUX+.

National regulations on remuneration and compensation of public employees and civil servants apply 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 mobilized experts (public, private or international institutions) are covered by SOCIEUX following the **Guide for Experts and Collaborative institutions** with detailed information on contracting with SOCIEUX+ (version as of the 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 preparing 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 the European Commission.

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 to 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 culturally-sensitive behaviour when dealing with their local counterparts.

10 OTHER CONSIDERATIONS

N/A

11 ANNEXES

N/A

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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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