

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: SOCIEUX 2023-15 Montenegro

Action title: *Capacity strengthening in the MLSW for updating the list of workplaces and occupations subject to insurance period calculated at an accelerated rate according to EU standards.*

Partner institution: Ministry of Labour and Social Welfare, Directorate for Pension and Disability Insurance

Activity/ies number(s) and title(s):

- *Activity 1* – To conduct an assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate against EU standards and to co-draft a proposal to update the current list.

Tentative dates of implementation and location:

- *Activity 1* - Preparation: 13 November to 1 December 2023 / On-site implementation: 4 to 15 December 2023 /Reporting up to 12th January 2024

Expert positions and responsibilities (by activity):

- Activity 1 : Expert 1 (principal) – Social Security Legislation, Social Security Policy, Pension Schemes, (Employment) Accident Benefits
- Activity 1 : Expert 2 – Social Security Legislation, Social Security Policy, Pension Schemes, (Employment) Accident Benefits

Workload:

Activity 1 - Expert 1 : Total 18 days (8 days at distance; and 10 days onsite)

Activity 1 - Expert 2 : Total 16 days (7 days at distance; and 10 days onsite)

Call for experts' reference: 23-15/MNE/1

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Final

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Partnership led by

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1 BACKGROUND INFORMATION

1.1 Country overview

Montenegro is a country located in South-Eastern Europe; the capital is Podgorica. Montenegro has an area of 13 883 square meters and a population of approximately 613,100 inhabitants. Montenegrin is the official language of the country, other languages such as Bosnian, Croatian, Serbian and Albanian are also used officially. Montenegro is a parliamentary republic and gained its independence from Serbia in 2006. Presidential elections will be held in March and April 2023. Montenegro has a GDP of 5.9 billion USD. Inflation has been significant but its effect on the cost of living was limited. High public debt and a deteriorating global environment require the country to pursue fiscal consolidation and reforms.

Montenegro's HDI has been steadily increasing over the years, and it ranks 49th out of 189 countries in the HDI ranking. The Centre region of Montenegro has the highest HDI score, while the North region has a slightly lower score. Montenegro has implemented comprehensive social and child protection system reform to support vulnerable children and families and prevent social exclusion. Montenegro has made important strides towards the achievement of the Sustainable Development Goals (SDGs). However, there are still numerous challenges to achieving the SDGs, and there is a need to strengthen national capacity for monitoring progress towards the SDGs. The National Strategy for Sustainable Development (NSSD) until 2030 is the key element of the 2030 Agenda for Sustainable Development's implementing architecture in Montenegro.

Montenegro applied for EU membership in 2008, secured candidate status in 2010, and membership negotiations began in June 2012. Montenegro has opened all 33 negotiating chapters and provisionally closed three. However, due to domestic political instability, there has been little progress in negotiations since 2020.

1.2 Sector situation

Montenegro has been advised to continue reforming its social protection system based on the Roadmap of Social Protection Reform. The country initiated significant pension reforms in 2020, reversing previous reforms aimed at fiscal consolidation of the social insurance system. These reforms targeted various parameters of Montenegro's pay-as-you-go (PAYG) system, including the retirement age, indexation formula, calculation period, and pension points formula.

In 2020, the retirement age for men was capped at 66 years, and the gradual increase of the retirement age for women was reduced from 67 by 2041 to 64 by 2028. The pensionable base was increased by reducing the calculation period from the full career to only three quarters of the career, excluding the lowest quarter of contributing years. However, this more favorable calculation period will close in 2030.

Pension benefits in Montenegro are determined by a pension point formula, which is indexed by a "rotational indexation" based on the Consumer Price Index (CPI) rate of change and the average gross wage growth. The value of the benefit is indexed to 75 percent of the higher parameter and 25 percent of the lower parameter. The minimum pension was also increased from EUR 149 in December 2021 to EUR 254 in September 2022.

Montenegro also has a Regulation that determines the workplaces and occupations for which the insurance service is calculated at an accelerated rate. This Regulation defines 24 different sections within which there are 139 workplaces and jobs in private and state-owned companies. Depending on the specific workplaces and occupations, the Regulation establishes four degrees of the extended service period, ranging from 12/14 to 12/18. This means that every 12 months spent in these positions will be included in the service/insurance period as 14, 15, 16, or 18 months. The Regulation contains also the Methodology for preparation of professional documentation for establishing and reviewing of jobs subject to accelerated service period.

Certain hazardous occupations in Montenegro remain eligible for early retirement, including professions that are no longer included in most EU countries. The 2020 Law closed the ad hoc early retirement option for metal workers by the end of 2022 but reintroduced the eligible pensionable service for military conscription, which had been closed over a decade ago.

While recent reforms have rolled back previous fiscal consolidation efforts, they are estimated to ensure adequate pensions in the long term. However, the Social Protection Situational Analysis report by the World Bank (2022) highlights occasional political interventions that disrupt the system's consistency and finances.

The country does not have a centralized system or registry for recording occupational accidents and diseases. This lack of a register makes it difficult to identify patterns, trends, and risk factors associated with work-related injuries and illnesses. This can hinder the development of effective prevention strategies and the allocation of resources to address the most pressing issues.

1.3 Role of partner institution in the sector

The Directorate for Pension and Disability Insurance in Montenegro is under the jurisdiction of the Ministry of Labor and Social Welfare. The Ministry is responsible for the development and implementation of social policies, including social protection programs and services, labor market policies, and occupational safety and health regulations. The Directorate for Pension and Disability Insurance is responsible for ensuring that individuals are covered by the mandatory pension and disability insurance system and that they receive the benefits they are entitled to. The Directorate also plays a role in implementing changes to the pension system and conducting statistical monitoring and analysis of trends in the pension and disability insurance fund beneficiaries. Additionally, the Directorate is responsible for establishing workplaces or jobs subject to an accelerated service period and determining the procedure and method for their determination.

The list of workplaces and occupations subject to accelerated service period in Montenegro is regulated by the secondary regulation under the Pension and Disability Insurance (PDI) Law (Article 72) and adopted by the Ministry of Labour and Social Welfare, except for the public administration and military in which cases the regulation is adopted by the Government (accelerated service period of the insured persons with disabilities and of insured women is regulated by the Law). Workplaces and occupations, as well as the degree of extension of the service period are under the Law and as of 2007 subject to review after five years (Article 72). According to the Regulation, employers, other interested parties and the Pension and Disability Insurance Fund of Montenegro can initiate establishment of the new and revision of the current workplaces and occupations subject to accelerated service period and acceleration degree.

In the past few years, this Ministry has received a large number of requests to expand the list of workplaces/jobs where the insurance period is calculated with increased duration. In recent years though, statutory pensionable ages across Europe are being increased and early retirement pathways restricted, while policies increasingly focus on alternatives to early retirement, a policy direction in which the Ministry would like to move towards.

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)

To guarantee equitable retirement conditions considering the effects of arduous and hazardous working conditions on the health and employability of workers

2.3 Expected results

R. 1: The Ministry acknowledges models and leading principles necessary to update the list of workplaces and occupations subject to insurance period calculated at an accelerated rate according to EU standards.

R. 2: The Ministry's capacities to update through social dialogue the list of workplaces and occupations subject to insurance period calculated at an accelerated rate are strengthened.

2.4 Final deliverables

D. 1.1: Assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate and the procedure and method for their determination against EU standards

D. 1.2: Proposal to update the current list workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate

D. 2: A technical report and the PPT presentations of EU case studies, discussing existing policy mixes in EU member States combining pension policy and employment policy measures that are potentially transferable to the national context

3 METHODOLOGY

3.1 General methodology (of the action)

With the aim to guarantee equitable retirement conditions considering the effects of arduous and hazardous working conditions on the health and employability of workers (S1), this action will conduct an assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate and the procedure and method for their determination against EU standards and, based on the assessment, a proposal to update the current list of workplaces and occupations will be prepared (act.1). During activity 2, the results of the assessment and the existing policy mixes in EU member States to ensure that the workers in arduous or hazardous jobs are enabled to work longer or, if this is not possible, can enjoy adequate income security will be presented and critically discussed among relevant stakeholders (act.2).

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – To conduct an assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate against EU standards and to co-draft a proposal to update the current list.
- Activity 2 – To present and critically discuss among relevant stakeholders the results of the assessment and the existing policy mix in EU member States combining pension policy and employment policy measures.

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

- Activity 1.

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;
- Environmental sustainability;
- 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

The objective of the first on-site activity is to provide the Partner Institution with expert advice and consulting on the update of the existing list of workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate. Given the short-term nature of the mission, the experts and partner institution will agree during the preparation on a shared methodology, focusing on the outline and scope of the final deliverables.

The first week of the on-site mission will be devoted to the assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated

at an accelerated accrual rate and the procedure and method for their determination against EU standards. Relevant social partners and unions shall be closely consulted and involved in the assessment and their views included in the final deliverable. The assessment shall consider the good practices of EU Member States that monitor/map this category of workers, legally recognise them, and apply an integrated approach, combining pension policy and employment policy measures, to help workers in arduous or hazardous jobs to remain active in the labour market while enjoying decent working conditions. Recommendations on the transferability of these good practices in the Montenegrin context should be provided. The potential financial impact of these recommendations should be considered and reflected in the assessment.

The assessment should provide the basis for drafting a proposal for updating the current list of workplaces and occupations in the second week of the on-site mission. A working group shall be organised to enable the co-drafting process together with the resource persons from the partner institution and other stakeholders. The workshops will be dedicated to the material drafting of the list update proposal, which will be further refined by the partner.

4.1 Tasks

The Experts' team:

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

The experts shall conduct the activity by means of organising a series of workshops with the Partner Institution and relevant stakeholders, including tripartite constituents, based on the co-developed methodology and agenda.

The 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 one or more resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation and implementation of the activity, including sharing relevant information, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant
- the material organisation on site (including covering the costs of premises and logistics)

Tasks:

Minimum tasks expected from the experts shall include:

Preparation:

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

Implementation:

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

- 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 finalisation.
- Participate in the briefing/debriefing with the Delegation of the European Union in the country.
- At the end of the exchanges, ask the workshop participants to complete a short feedback questionnaire (link provided by SOCIEUX+).
- Channel to SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

Reporting:

- At the end of the mission, timely submit to SOCIEUX+ the final deliverables (10 working days after the mission). Use the templates and evaluation forms provided by SOCIEUX+.
- Go through a round of comments and adjustments in interaction with SOCIEUX+ and the Partner.

4.2 Deliverables

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

- 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).
- An individual completed 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 in during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- **Technical deliverable (D1.1):** Assessment of the regulation on determination of the workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate and the procedure and method for their determination against EU standards.
- **Technical deliverable (D1.2):** Proposal to update the current list of workplaces and occupations for which the old-age insurance period is calculated at an accelerated accrual rate.

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):

Area(s) of expertise:

Social Security Legislation, Social Security Policy, Pension Schemes, (Employment) Accident Benefits

Specific skill(s) & competency(ies):

- 1.2. Policy & strategy making and development, 1.3. Policy & strategy steering and implementation.
- 2.1. Legislation & regulation making and development, 2.2. Legislation & regulation implementation and enforcement.

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 combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):

Seven (7) years.

c) Required language knowledge: English

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

d) Relevant experience in conducting assessments, strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on Pension Schemes) within an EU public administration

e) Substantial knowledge in the field of retirement regimes for workers in arduous and hazardous jobs in EU countries

Additional assets (advantageous in selection):

- Knowledge of Montenegrin
- Substantial knowledge on the ways in which EU countries address the arduousness and hazardousness of work in national policies.
- A previous experience in delivering short-term technical assistance in international cooperation.
- A previous professional experience in the Western Balkans

Expert (Expert #2):

Area(s) of expertise:

Social Security Legislation, Social Security Policy, Pension Schemes, (Employment) Accident Benefits

Specific skill(s) & competency(ies):

- 1.2. Policy & strategy making and development, 1.3. Policy & strategy steering and implementation.
- 2.1. Legislation & regulation making and development, 2.2. Legislation & regulation implementation and enforcement.

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.

- a) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s):

Five (5) years.

- b) Required language knowledge: English

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

- c) Relevant experience in conducting assessments, strategic planning, managing, accompanying, advising decision-makers on change and policy reforms in the public sector (particularly on Pension Schemes) within an EU public administration;

- d) Substantial knowledge in the field of retirement regimes for workers in arduous and hazardous jobs in EU countries

Additional assets (advantageous in selection):

- Knowledge of Montenegrin
- Substantial knowledge on the ways in which EU countries address the arduousness and hazardousness of work in national policies.
- A previous experience in delivering short-term technical assistance in international cooperation.
- A previous professional experience in the Western Balkans

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/this activity. 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 workload¹

	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	4	10		4	18
Expert (#2)	3	10		3	16
Total experts	7	20		7	34

¹ 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 by²:
 - 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 format³.
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+.

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

³ 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 servant will be contracted by FIIAPP according to its internal rules.

- **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 mobilised 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.

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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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