

## TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** *SOCIEUX 2023-30 SERBIA*

**Action title:** Occupational health and safety for working at high and low temperatures

**Partner institution:** Ministry of Labour, Employment, Veteran and Social Policy

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

- Activity *#1* - Revising current guidelines for ensuring safe and healthy outdoor work during high and low temperature conditions, while incorporating insights from EU experiences
- Activity *#2* - Training for trainers "Implementing health and safety procedures of work at high and low temperatures"

### Tentative dates of implementation and location:

- Activity *#1* - from November 20<sup>th</sup> 2023 to January 05<sup>th</sup> , 2024 (with an on-site mission from December 4<sup>th</sup> to 15<sup>th</sup> , 2023 in Belgrade, Serbia)
- Activity *#2* - from January 22<sup>nd</sup> , to February 23<sup>rd</sup> , 2024 (with an on-site mission from February 5<sup>th</sup> to 9<sup>th</sup> , 2024 in Belgrade, Serbia)

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

- Activity *#1 and #2*: Expert *#1 (principal)* - Expert on occupational, safety and health (OSH)
- Activity *#1 and #2*: Expert *#2* - Expert on training and labour inspection

### Workload:

|   |  |
|---|--|
| Activity <i>#1</i> - Expert <i>#1</i> : | Total 18 days (8 days at distance; and 10 days onsite) |
| Activity <i>#1</i> - Expert <i>#2</i> : | Total 16 days (6 days at distance; and 10 days onsite) |
| Activity <i>#2</i> - Expert <i>#1</i> : | Total 13 days (8 days at distance; and 5 days onsite)  |
| Activity <i>#2</i> - Expert <i>#2</i> : | Total 12 days (7 days at distance; and 5 days onsite)  |

**Call for experts' reference:** **23-30/SER/1/1, 23-30/SER/1/2, 23-30/SER/2/1, and 23-30/SER/2/2**

**Version - #:** \_\_\_\_

☐ Draft

☒ Final

Date: *September 21, 2023*

## 1 BACKGROUND INFORMATION

### 1.1 Country overview

Serbia is a country located in Southeast Europe and has a population of 6.817 million people. The official language is Serbian, and the currency used is the Serbian Dinar (RSD). Serbia is a parliamentary republic. The President and head of state is Aleksandar Vučić, who has been in office since 2017. The last parliamentary elections in Serbia took place on June 21, 2020. The next parliamentary elections will take place in 2024.

Serbia experienced positive economic growth rates in recent years, driven by factors such as increased investment, export growth, and improvements in the business environment. Serbia rebounded strongly from the impact of the global pandemic, with growth reaching 7.4 percent in 2021. After a strong recovery in 2021, however, several domestic and international factors have caused an economic slowdown. Inflation has also increased significantly, with adverse effects on incomes of the poor and vulnerable.

Serbia posted solid GDP growth in Q1 and Q2 of 2022 (4.3 and 3.9 percent, y/y), while unemployment declined to 9.2 percent in Q2. Poverty (income under \$6.85/day in 2017 PPP) declined slightly from 12.2 percent in 2020 to 10.5 percent in 2021. Inflation has increased, despite the introduction of some price controls, reaching 13.7 percent in June 2023.<sup>1</sup>

The consolidated fiscal deficit reached 0.2 percent of GDP in the first half of 2022. Public debt remained broadly stable throughout 2022, at 57 percent of GDP. The current account deficit widened to reach EUR 2.7 billion, largely on account of a major increase in energy imports.

Human development index (HDI) of Serbia, was 0.802 points in 2021. GINI Index is 68.5 and was most recently measured in 2020. According to Eurostat, Serbia unemployment rate for 2022 was 9.47%, a 0.59% decline from 2021. The government has been focusing on improving the quality of jobs and reducing informal employment. At-risk-of-poverty rate in the country was around 21% in 2021. The government has implemented social protection programs and reforms to address these issues. However, regional disparities persist, with rural areas and certain population groups facing greater challenges in terms of access to social services and opportunities.

Serbia has been an official candidate for European Union membership since 2012. The EU accession process involves aligning the country's laws and regulations with the EU Acquis, which comprises various policies and standards required for EU membership. The European Commission regularly publishes progress reports on Serbia's advancements in the accession process. Chapter 19 of the EU Acquis focuses on social policy and employment. It addresses issues related to labour market regulations, working conditions, and equal opportunities in the workforce. Progress has been made in this area, but further efforts are needed to fully align with EU standards and ensure a fair and inclusive labour market. The EU has emphasized the importance of improving labour market conditions in Serbia, including the promotion of gender equality, the prevention of discrimination in the workplace, and the enforcement of worker rights.

In the area of health and safety at work, a new law has been adopted in 2023. Serbia adopted implementing legislation on health and safety measures on exposure to chemical substances, the production and manipulation of explosives and gunpowder, when using work equipment, exposure to electromagnetic fields and exposure to artificial optical radiation. The number of fatalities in the workplace increased from 50 in 2020 to 61 in 2021, with the majority of cases occurring in the construction industry.<sup>2</sup>

Serbia still faces challenges that limit its potential growth, both in the short and medium to long term. With limited space for future stimulus packages, structural reforms are needed to bring the economy back to sustained growth, boost jobs and incomes, and strengthen resilience to shocks – while gradually transitioning to a greener and more resilient development trajectory.

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<sup>1</sup> World Bank Data

<sup>2</sup> EC Serbia 2022 Report, <https://neighbourhood-enlargement.ec.europa.eu/system/files/2022-10/Serbia%20Report%202022.pdf>

## 1.2 Sector situation

Occupational Safety and Health is a right guaranteed by the Constitution of the Republic of Serbia according to which everyone has the right to respect the dignity of one's own personality, to Labor, to Occupational Safety and no one can forfeit these rights. The Resolution of the Republic of Serbia Accession to the European Union ("RS Official Gazette", no. 112/04) and the Verification Law of Agreement of Stabilization and Accession between the European Communities and their Member States, on one side, and the Republic of Serbia, on the other ("RS Official Gazette", no. 83/08), have made demands to establish the Occupational Safety and Health System based on modern conditions of the EU market economy.

Rights associated with Occupational Health and Safety come from Labor Rights, so the legal frame is already contained in the Labor Law, the Community-health Law, the Health Insurance Law, the Pension and Disability Fund Law and many other Laws having in mind that the sphere of Occupational Safety and Health has a multidisciplinary property.

In the field of labour law, the law of 2014 remains only partially aligned with the EU acquis and the drafting of a new law has yet to be initiated. It should address in particular the fact that the Serbian labour law, and therefore related labour inspections, do not apply to foreign seconded workers; only rules related to health and safety at work apply to them.<sup>3</sup>

On 28 April 2023, on the International Day of Safety and Health at Work, the National Assembly of the Republic of Serbia passed the new Law on Safety and Health at Work. The introduction of the new law reflects Serbia's commitment to align its workplace safety standards with international norms and best practices. By prioritizing the well-being of workers and promoting a culture of safety, the legislation aims to enhance productivity, reduce absenteeism, and ultimately create a healthier and more secure work environment.

However, the successful implementation of the law will require adequate resources, training, and awareness campaigns to ensure widespread compliance and understanding. Ongoing evaluation and refinement of the legislation's effectiveness will be crucial to address emerging safety challenges and continuously improve workplace conditions in Serbia.

In Serbia, construction is one of the most hazardous sectors. Construction suffers from a high number of work accidents, especially serious and fatal accidents. The complex contractual structure and the high level of temporary employment are also closely related to the high number of work accidents and occupational diseases in the sector. The Labour Inspectorate is not sufficiently equipped to deal with the prevention of work accidents; it is understaffed and lacks specialized trainings.<sup>4</sup>

Strategy on safety and health at work in the Republic of Serbia with an Action Plan for its implementation (2018-2022) ("Official Gazette of RS", number 96/18) defines as priority goals to raise awareness of the importance of safety and health at work for all interested parties, as well as the improvement of national culture prevention in the field of safety and health at work.

## 1.3 Role of partner institution in the sector

In the Republic of Serbia, occupational safety and health is under the responsibility of Ministry of Labour and Social Policy. The Ministry includes two administrative bodies active in the subject field, in particular Occupational Safety and Health Directorate that, among other things, prepares legislation and Labour Inspectorate competent for supervision over its enforcement.

The Ministry of Labour and Social Policy cooperates directly and constantly with other authorities (ministries responsible for health, environment, mining, etc), and institutions responsible for health, pension and invalid insurance, as well as with social partners, universities, and others.

As a focal point of the European Agency for Safety and Health at Work, the Occupational Safety and Health Directorate established national occupational safety and health network in Serbia encompassing representatives of the line ministries, social partners, universities and others.

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<sup>3</sup> EC Serbia 2022 Report, <https://neighbourhood-enlargement.ec.europa.eu/system/files/2022-10/Serbia%20Report%202022.pdf>

<sup>4</sup>ILO Decent Work Country Programme 2019–2022, [https://www.ilo.org/wcmsp5/groups/public/---europe/---ro-geneva/---sro-budapest/documents/genericdocument/wcms\\_676205.pdf](https://www.ilo.org/wcmsp5/groups/public/---europe/---ro-geneva/---sro-budapest/documents/genericdocument/wcms_676205.pdf)

In 2013, the Administration for Occupational Safety and Health of the Ministry of Labour, Employment, Veterans and Social Affairs prepared Guidelines for safe and healthy work outdoors at high temperatures and in 2017, guidelines for work outdoors at low temperatures. Serbia is facing significant climate change, and update of these Guidelines will provide better instructions to implement and control OSH in the workplace.

## **2 ACTION DESCRIPTION**

### **2.1 Overall objective**

Awareness and knowledge on social protection and decent work is increased.

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

To promote and support the development of a preventive safety and health culture for high and low temperatures' workplace.

### **2.3 Expected results.**

R 1: The guidelines of the work at high and low temperature are reviewed.

R 2: The knowledge of inspectors, Occupational Health and Safety Administration's staff and social partners on how to guarantee the health of workers at high and low temperature is strengthened.

### **2.4 Final deliverables**

- D. 1: Updated guidelines for safe and healthy outdoor work in high temperature conditions
- D. 2: Updated guidelines for safe and healthy outdoor work in low temperature conditions
- D. 3: A compendium of training-of-trainers materials with focus on the revised guidelines for ensuring safe and healthy outdoor work during low and high temperature conditions
- D. 4: Concept for a simplified leaflet/brochure intended for broader distribution

## **3 METHODOLOGY**

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

The purpose of the proposed action is to address the challenges outlined by leveraging Serbia's existing Strategy on safety and health at work and its Action Plan (2018-2022) for implementation. The Action is focusing on the updating Guidelines for safe and healthy outdoor work at high and low temperatures and capacity building for the implementation of these procedures. Main goal is to ensure workplace safety and well-being for workers while also promoting national prevention culture in this domain. The Action encompasses two activities that will be implemented on site in Belgrade. *The first activity* will allow to review the existing guidelines with the aim of enhancing the safety and well-being of outdoor workers under high/low temperature conditions. This process will involve incorporating insights derived from the experiences of the European Union. *The second Activity* involves the implementation of a training-of-trainers program, which is designed to educate labour inspectors, OSH Administration staff and social partners on effective health and safety protocols for working in both high and low temperature environments. The expected deliverables include the production of updated guidelines specifically tailored to ensure secure outdoor work during varying temperature extremes. Additionally, a comprehensive compendium of training materials will be developed, with a notable emphasis on the revised guidelines for guaranteeing worker safety. As well, experts will deliver conception of a simplified leaflet/brochure, intended to facilitate the broader dissemination of crucial safety information among a wider audience.

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

The following activities are currently planned for the action:

- Activity 1 – Revising current guidelines for ensuring safe and healthy outdoor work during high and low temperature conditions, while incorporating insights from EU experiences

- Activity 2 – Training for trainers “Implementing health and safety procedures of work at high and low temperatures”

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

- Activity #1 & #2.

### 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.
- Human rights (including rights of children, people living with disabilities, vulnerable groups and minorities, labour rights); and,
- Good governance;

## 4 ACTIVITIES DESCRIPTION

### 4.1 Tasks

#### 4.1.1. Activity 1- *Revising current guidelines for ensuring safe and healthy outdoor work during high and low temperature conditions, while incorporating insights from EU experiences*

For the first activity in Belgrade, a series of workshops and meetings will be organized with the Ministry to jointly revise and update two guidelines. The revised guidelines will then be formulated, taking into account the accumulated knowledge from both the current guidelines and the EU experiences.

Experts will assess the strengths and weaknesses of the existing guidelines, compare them with relevant EU practices, and identify areas that could be improved. They will share successful methods, lessons learned, and effective approaches from the EU's experience in managing outdoor work in high/low temperatures. These insights will be thoughtfully adapted to fit Serbia's specific needs and circumstances.

Revision of the Guidelines will be developed through:

- An analysis based on desk research: the Law on occupational safety and health, Guidelines for safe and healthy outdoor work at high temperatures, Guidelines for safe and healthy outdoor work at low temperatures, provisions of IPA programming on OSH implemented with ILO, other relevant initiatives etc.
- Interviews and the workshops with the representatives of institutions: Ministry, labour inspectors, OSH Administration's staff and other social partners

SOCIEUX+ Action 2023-30 will support peer-to-peer exchanges for the review of the guidelines, by the European public experts mobilized by SOCIEUX+. 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 selected representatives of partner institution to ensure mutual understanding during the implementation of the activity. Translation and interpretation from Serbian to English and vice versa would be provided throughout the mission.

### Responsibilities:

- Experts mobilized by SOCIEUX+:

The mission shall be implemented on site in Belgrade.

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 Ministry of Labour, Employment, Veteran and Social Policy (Ministry), to be discussed and validated ahead of the mission (for ex: displaying EU models, designing a methodology for facilitating peer-to-peer consultations in Belgrade, etc....)

- Partner Institution (Ministry):

Ministry of Labour, Employment, Veteran and Social Policy shall work in collaboration with experts supporting the preparation and implementation of the activity.

The Ministry shall facilitate the organisation of the activity with regards to the following aspects:

- nominating one or more internal resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation of the activity, including sharing relevant background documents, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant
- the Partner will provide professional interpretation for the on-line preparatory meetings and debriefings with the experts mobilized by SOCIEUX+
- the Partner will provide translated background documents (or the substantial excerpts of them) including relevant Laws, Strategies, Guidelines, Plans and other relevant documents for the desk research.
- 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:

Minimum tasks expected from the experts shall 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 Belgrade 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 Ministry, prepare all relevant documents for the realization of the activity (questionnaires, interviews, scripts for the meetings and workshops...)



- **Task #2** – to conduct consultations with the Partner’s executives and staffs, as well as any other relevant actors who can support the activity
- **Task #3** – To present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalization.
- **Task #4** – The experts will be available for a meeting in Belgrade 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+.

#### 4.1.2. Activity 2- Training for trainers "Implementing health and safety procedures of work at high and low temperatures"

Building upon the insights gained from the first activity, the experts will proceed to develop training materials and conduct training sessions aimed at equipping trainers (Staff of the Ministry, Labour Inspectorate and social partners) with the knowledge and skills required to implement health and safety protocols for work in high and low temperature conditions. Proposed training topics are (and not limited to): rule-enforcement of the OSH policies, impact on OSH regulation, sensitization towards companies and workers and workers' compensation etc. Participants on the training will be: staff of the Ministry, labour inspectors and social partners. The experts will design a comprehensive training of trainers program, collaborating with the partners to identify additional stakeholders who should participate in the training. The training program will encompass a structured learning plan, clear learning objectives, intended outcomes, and various learning events. Alongside, they will develop essential learning resources and materials, outlining the instructional and assessment methods, including the evaluation of both the training program and the trainees' final proficiencies. Additionally, a strategy for disseminating the knowledge will be incorporated into the plan as a follow up for the PI to transfer the trainer’s knowledge.

Furthermore, the experts will propose an outline for a leaflet or brochure, intended for wide distribution. This material will serve as a tool to raise awareness among stakeholders and the general public, facilitating the understanding and adoption of the key concepts related to health and safety procedures in different temperature conditions.

The public experts mobilized by SOCIEUX+ will work closely with the selected representatives of partner institution to ensure mutual understanding during the implementation of the activity. Translation and interpretation from Serbian to English and vice versa would also be necessary throughout the mission.

#### **Responsibilities:**

- Experts mobilized by SOCIEUX+:

The mission shall be implemented on site in Belgrade.

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 Ministry of Labour, Employment, Veteran and Social Policy (Ministry), to be discussed and validated ahead of the mission (for ex: displaying EU models, designing a methodology for facilitating peer-to-peer consultations in Belgrade, etc....)

- Partner Institution (Ministry):

Ministry of Labour, Employment, Veteran and Social Policy shall work in collaboration with experts supporting the preparation and implementation of the activity.

The Ministry shall facilitate the organisation of the activity with regards to the following aspects:

- nominating one or more internal resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation of the activity, including sharing relevant background documents, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant
- the Partner will provide professional interpretation for the on-line preparatory meetings and debriefings with the experts mobilized by SOCIEUX+
- the Partner will provide translated background documents (or the substantial excerpts of them) including relevant Laws, Strategies, Guidelines, Plans and other relevant documents for the desk research.
- 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:**

Minimum tasks expected from the experts shall 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 Belgrade 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 Ministry, prepare all relevant documents for the realization of the activity (scripts for the meetings and materials trainings...)
- **Task #2** – to conduct consultations with the Partner's executives and staffs, as well as any other relevant actors who can support the activity
- **Task #3** – To present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalization.
- **Task #4** – The experts will be available for a meeting in Belgrade 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 Activities 1 and 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 mission agenda, detailing the meetings and training sessions to be held, persons to meet, etc. The mission Agenda shall not exceed 2 pages.

### **4.2.2 Final deliverables for Activity 1**

- 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.
- **D1 - Annex 1 of the AcR:** Updated guidelines for safe and healthy outdoor work in high temperature conditions
- **D2 - Annex 2 of the AcR:** Updated guidelines for safe and healthy outdoor work in low temperature condition

### **4.2.3 Final deliverables for Activity 2**

- 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.
- **D1 - Annex 1 of the AcR:** A compendium of training-of-trainers materials with focus on the revised guidelines for ensuring safe and healthy outdoor work during low and high temperature conditions. Compendium material shall be consisted of at least: training matrix, learning plan, events, objectives and outcomes, means of instructions and evaluation, dissemination strategy, learning resources and materials.

- **D2 - Annex 2 of the AcR:** Concept for a simplified leaflet/brochure intended for broader distribution. Concept should be consisted of and not limited to: brief introduction to the purpose, understanding temperature risks, temperature precautions, outline of safety tips, using the right equipment and supervisor responsibilities etc.

## 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 on occupational, safety and health (OSH)**

#### **Area(s) of expertise:**

*Occupational Safety and Health, Labour Standards, Working Conditions, Economic and Social Rights*

#### **Specific skill(s) & competency(ies):**

*1.2.P&S making and development, 1.3.P&S steering and implementation, 2.1.L&R making and development, 8. Individuals' capacity building/training,*

#### **Requirements (essential/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.
- Minimum 7 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.
- Relevant experience developing OSH plans and guidelines related to high and low temperatures
- Knowledge and experience of EU and EU Member States' policies in the field of occupational safety and health, labour standards and working conditions
- Experience design and delivery of trainings of trainers
- Fluent in English, written and oral

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

- Knowledge of Serbian
- A previous experience in delivering short-term technical assistance in international cooperation.
- A previous professional experience in the Western Balkans

#### **Expert (Expert #2): Expert on training and labour inspection**

**Area(s) of expertise:** *Occupational Safety and Health, Labour Standards, Working Conditions, Economic and Social Rights*

#### **Specific skill(s) & competence(s):**

*8. Individuals' capacity building/training, 7.Communication & social marketing, 3.2.Quality assurance, inspection and audit*

#### **Requirements (essential/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.
- Minimum 5 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.
- Relevant experience related to inspection and labour law enforcement
- Experience in training, capacity building and developing learning materials on themes of OSH
- Experience in communication and sensitization strategies
- Fluent in English, written and oral

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

- Knowledge of Serbian
- 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](mailto:experts@socieux.eu), indicating the reference of the call for experts.

## 6.2 Estimated workload<sup>5</sup>

| Activity #1              | Preparation | Onsite work | Distance work | Reporting & deliverables | Total     |
|--------------------------|-------------|-------------|---------------|--------------------------|-----------|
| Principal expert (#1)    | 4           | 10          | /             | 4                        | 18        |
| Expert (#2)              | 3           | 10          | /             | 3                        | 16        |
| <b>Total Activity #1</b> | <b>7</b>    | <b>20</b>   | <b>/</b>      | <b>7</b>                 | <b>34</b> |
| Activity #2              | Preparation | Onsite work | Distance work | Reporting & deliverables | Total     |
| Principal expert (#1)    | 5           | 5           | /             | 3                        | 13        |
| Expert (#2)              | 5           | 5           | /             | 2                        | 12        |
| <b>Total Activity #2</b> | <b>10</b>   | <b>10</b>   | <b>/</b>      | <b>5</b>                 | <b>25</b> |

## 7 APPLICATIONS

<sup>5</sup> Please note that travel days are not considered as working days.

## 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 by<sup>6</sup>:
  - 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 format<sup>7</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 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](http://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+.

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.

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

<sup>7</sup> Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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.

## **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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