

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2023-35 SERBIA*

Action title: *Capacity building for improved reporting on Social Protection*

Partner institution: *Republic Institute for Social Protection*

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

- Activity #1 - Definition of key indicators of monitoring and reporting on social system
- Activity #2 - Elaborating indicators on gender, human rights, vulnerability and inequality
- Activity #3 - Analysing and updating the Institute's guidelines of methodology applicable to monitoring and reporting of social system

Tentative dates of implementation and location:

- Activity #1 - from November 20th to December 29th, 2023 (with an on-site mission from December 04th to 15th, 2023 in Belgrade, Serbia)
- Activity #2 - from January 08th to February 09th, 2024 (with an on-site mission from January 22nd to 26th, 2024 in Belgrade, Serbia)
- Activity #3 - from February 12th to March 22nd, 2024 (with an on-site mission from February 26th to March 08th, 2024 in Belgrade, Serbia)

Expert positions and responsibilities (by activity):

- Activity #1, #2 and #3: Expert #1 (*principal*) - Expert on monitoring and reporting on social protection (research design oriented)
- Activity #1, #2 and #3: Expert #2 - Expert gender, human rights and vulnerability

Workload:

Activity #1 - Expert #1:	Total 17 days (7 days at distance; and 10 days onsite)
Activity #1 - Expert #2:	Total 16 days (6 days at distance; and 10 days onsite)
Activity #2 - Expert #1:	Total 12 days (7 days at distance; and 5 days onsite)
Activity #2 - Expert #2:	Total 11 days (6 days at distance; and 5 days onsite)
Activity #3 - Expert #1:	Total 17 days (7 days at distance; and 10 days onsite)
Activity #3 - Expert #2:	Total 16 days (6 days at distance; and 10 days onsite)

Call for experts' reference: **23-35/SER/1/1, 23-35/SER/1/2, 23-35/SER/2/1, 23-35/SER/2/2, 23-35/SER/3/1, and 23-35/SER/3/2**

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Draft

Final

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SOCI^{EUX}+

EU expertise on social protection,
labour and employment

SOCI^{EUX}+ is implemented by

Partnership led by



Co-financed by the European Union

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 2023.¹

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. In the area of social inclusion and social protection, in 2020, 6.9 % of the population was considered to be living in absolute poverty (7 % in 2019). According to the latest survey on income and living conditions (SILC), the at-risk-of-poverty rate was 21.7 % in 2020 (EU-27 17.1 %) and the at-risk-of-poverty or social exclusion rate was 29.8 % (EU-27 21.9 %). Inequality in income distribution is high at 33.3 % of the Gini coefficient according to income in 2020, which is above the EU-27 average (30.0 %). 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. 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. Serbia partially complies with the EU acquis on social statistics. The survey on income and living conditions is carried out regularly in compliance with EU standards and data is sent to Eurostat. Serbia is fully compliant in social protection statistics and provide Eurostat with European system of integrated social protection statistics (ESSPROS) data and metadata of good quality and coverage, according to the legal deadlines.²

The capacity for inclusive and evidence-based policy and legislative development, including when aligning with the EU acquis, still needs strengthening. Administrative data collection and its systematic use for policy and law-making has to be further improved across the administration. The methodology on impact assessments needs to be consistently applied. The Public Policy Secretariat's acceptance of 'partial compliance' with the methodology limits the degree of alignment with legal requirements and improvement in the overall quality of the impact assessments.

1.2 Sector situation

Serbia has identified fostered social inclusion as one of the important tasks in the process of EU accession. This task includes development and advancement of policies, institutional framework and methodology for monitoring social inclusion of individuals and social groups in Serbia.

¹ World Bank Data

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

A new strategy for social protection and amendments to the law on social welfare are still pending. The quality and coverage of social services need to improve, and oversight and regulatory mechanisms, monitoring and evaluation need to be strengthened. Funding for developing community-based services, and for supporting licensed service providers and social services, remains insufficient.

The capacities of the social protection system were slightly increased by employing 122 new staff in 2021 and 43 new staff in February 2022; however, according to the assessment of the authorities, an additional 1 388 staff are lacking.³

Monitoring in the social protection area is continuously being improved. The data on the Republic of Serbia have been collected regularly and published on the Eurostat website since 2010. Serbia is monitoring in accordance to the EU social protection and social security indicators and from 2017 introduced its country specific indicators in this field. The future course of action includes the development of a National Social Monitor (a mechanism for monitoring social protection performance).

Serbia is at the stage of prioritising the goals and “mainstreaming” the social protection indicators. Further improvements to the indicators to monitor the status of vulnerable groups, as well as the entire population, will primarily require increasing the availability of administrative data sources and their disaggregation (by sex, age, ethnicity, disability), linking administrative and survey data, as well as enhancing the in-house analytical capacities of national- and local-level institutions⁴

Serbia published the third edition of the gender equality index in October 2021. According to the index, Serbia achieved 58.0 points, which indicates continuous progress in improving gender equality. An increased number of budget users introduced gender-responsive budgeting in their 2022 budgets. More efforts are needed to collect official sex-disaggregated data and statistics, which are lacking in several domains.

According to the Law on Social Protection, the Republic Institute for Social Protection (the Research Department) is responsible for monitoring the social protection system, according to the Decision on the Program of Official Statistics in the period from 2021 to 2025, ("Official Gazette of RS" No. 13/2021) the responsible producer of statistics, and by the Decree on establishing the Official Statistics Plan for 2022 ("Official Gazette of RS", no. 133/2021) designated as the responsible producer of official statistics for the group of areas III. DEMOGRAPHY AND SOCIAL STATISTICS, area: 7. Social protection, sub-area: 1) Social protection statistics.

The Law has normatively defined the responsibilities of the Institute in the following fields:

- monitoring the quality of the professional work and services;
- researching the social phenomena and problems, activities and effects of social protection and proposing the measures for improving the services, policies and measures in the social protection system;
- development of the quality system in social protection;
- participating in developing, implementation, monitoring and assessment of effects of implementing strategies, action plans, laws and other provisions regarding the development of social protection activities;
- informing the professional and general public on the implementation of social protection, indicating the needs and problems of the beneficiaries, especially the ones belonging to the vulnerable social groups.

1.3 Role of partner institution in the sector

Republic Institute for Social Protection (Institute) is established in the 2005 by the Government of the Republic of Serbia. The establishment of the Institute took place in the context of initiated social reforms, and in accordance with the defined national strategic documents - the Poverty Reduction Strategy and the Social Protection Development Strategy, as well as in the conditions of the adoption of the new Family Law and other laws and by-laws in the field of social protection.

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

⁴ Monitoring of Social Inclusion in Serbia
<https://www.unicef.org/serbia/media/936/file/Monitoring%20social%20inclusion.pdf>

Institute`s vision is a society based on respect for human rights, which strives for the full inclusion of all members and in which every citizen has equal opportunities to meet their needs and realize their potential.

Institute`s mission is an active participation in the improvement of the social protection system and providing professional support to all social actors in the development and implementation of the social inclusion policy.

According to the plan of official statistics the Institute carries out four annual surveys in the territory of the Republic of Serbia: Research on users and services, rights and social protection measures; Research on community day services; Research on support services for independent living, and Research on residential care. The data is collected from: Centers for social work, Residential care institutions, Centers for foster care, and licensed providers of local social services.

The Institute is committed to building a sustainable institutional framework for monitoring of the system. The goal of monitoring and reporting is to provide information on the achieved goals and applied policies, that is, to provide insight into the effects achieved by the social protection system through statistical data, i.e. the creation and implementation of policies aimed at eliminating inequality and the consequences of social exclusion.

Since its establishment, the Institute has been preparing annual reports. In 2021, seven reports were drawn up, submitted to the Ministry of Labour, Employment, Veterans and Social Affairs and published on the Institute's website.

In addition to monitoring and reporting on the social protection system, the Institute is a source of data for:

- reporting on the implementation of Conventions, i.e. on the monitoring of international documents ratified by the Republic of Serbia - Convention on the Rights of the Child, Istanbul Convention (Grevio Committee), Convention on the Rights of Persons with Disabilities, etc.
- reporting on the implementation of activities from sectoral strategies and Action Plans (Action Plan of the Strategy for the Prevention of Violence Against Children, Action Plan of the Strategy of Deinstitutionalization 2022-2026, etc.)
- reports on the implementation of activities from different chapters that Serbia opened in the EU accession process (Chapter 19, 23 and 24).
- databases of the Statistical Office: DevInfo database and international TransMONEE database (UNICEF)

The Institute's research department is struggling with a growing influx of data and analysis requests from diverse stakeholders. Additionally, the increasing number of statistical units, particularly service providers in the system, has intensified the department's efforts in mapping administrative data sources, registering them, and streamlining the data collection process. The challenge lies in the comprehensive nature of reports, primarily designed for the professional public, often leading to a lack of clarity for decision-makers. A, the Institute faces a significant knowledge gap regarding best practices in presenting findings for effective policy-making.

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. Monitoring and reporting capacities of Republic Institute for Social Protection's staff are strengthened

SO2. Technical competencies to use disaggregated and cross-cutting data for evidence-based policy making are improved.

2.3 Expected results.

R. 1: Indicators for monitoring the outputs and outcomes of social protection systems are developed based on EU models

R. 2: Gender, human rights and vulnerability indicators are developed

R. 3: An overall methodology applicable to Monitoring and Reporting tasks is defined

2.4 Final deliverables

D1: Updated list of key indicators for the monitoring efficiency, impact and accountability of the social protection system

D2: Developed set of gender, human rights, vulnerability and inequality indicators

D3: Updated guidelines of methodology for monitoring and reporting including designed templates for reports/briefs

3 METHODOLOGY

3.1 General methodology (of the action)

The Institute's current practice of conducting four annual surveys to collect data from various stakeholders, such as Centres for social work, Residential care institutions, Centres for foster care, and licensed providers of local social services, demonstrates a solid foundation for data collection. This ongoing process provides a basis for understanding the social protection landscape in Serbia. The action aims to enhance the monitoring and reporting capacities of the staff at the Republic Institute for Social Protection. By providing meetings, workshops, and indicator developing sessions, the staff's ability to effectively collect, analyse, and interpret data will be significantly improved. This capacity strengthening will enable them to handle diverse data sources more adeptly and produce more insightful reports.

Moreover, the action will update indicators for monitoring the social protection system by drawing inspiration from EU models. This move will improve the standardized framework, allowing comprehensive evaluations of system effectiveness. By adopting EU best practices, the Institute will refine its reporting methods, making its data more accessible to decision-makers. Emphasis will also be placed on creating indicators that highlight gender, human rights, and vulnerability aspects for a more inclusive assessment. Additionally, the action will streamline monitoring and reporting methods through an overarching methodology, enhancing the Institute's ability to extract meaningful insights. These efforts combined will provide a stronger toolkit for evidence-based policy making and informed decision-making, ultimately leading to a more effective and responsive social protection system.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity #1 - Definition of key indicators of monitoring and reporting on social system
- Activity #2 - Elaborating indicators on gender, human rights, vulnerability and inequality
- Activity #3 - Analysing and updating the Institute's guidelines of methodology applicable to monitoring and reporting of social system

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

- Activity #1, #2 and #3.

3.3 Inclusion of cross-cutting issues

SOCIEUX+ recognises the importance to include cross-cutting issues in social protection, labour and employment policies and systems. The following cross-cutting issues are duly taken into account:

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

4 ACTIVITIES DESCRIPTION

4.1 Tasks

4.1.1. Activity 1- Definition of key indicators of monitoring and reporting on social system

For the initial activity in Belgrade, a series of workshops and meetings will be arranged with the Institute to collaboratively identify and update the list of indicators for monitoring the social protection system. This list will incorporate insights gained from studying EU best practices and understanding their indicator selection and implementation methods.

The process will involve identifying indicators that have proven successful in the EU, analysing their relevance to the local social protection system, and refining or adapting them as necessary. This will equip the Institute with a comprehensive set of indicators that align with EU best practices and can contribute to improved monitoring and reporting of the social protection system's outcomes and impacts.

The public experts mobilized by SOCIEUX+ will work closely with the selected representatives of PI and partners. To ensure mutual understanding during the activity's implementation, translation and interpretation services from Serbian to English and vice versa will also be necessary throughout the mission.

Responsibilities:

- Experts mobilized by SOCIEUX+:

The mission shall be implemented both 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 (Institute), 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 (Institute):

Republic Institute for Social Protection (Institute) shall work in collaboration with experts supporting the preparation and implementation of the activity.

The Institute 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
- 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 interpretation for the on-line preparatory meetings, all documents needed for the desk research of the experts and debriefings with the experts mobilized by SOCIEUX+
- 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 Institute, 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
- **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- Elaborating indicators on gender, human rights and vulnerability

The goal is to ensure that the monitoring and reporting process comprehensively considers gender considerations, human rights perspectives, and the vulnerabilities faced by target groups. These indicators will be developed to capture gender inequality, adherence to human rights principles, and the unique challenges faced by vulnerable populations. The set of indicators will serve as a tool to assess how effectively the social protection system addresses these dimensions and whether its outcomes are equitable and inclusive.

The activity involves a meticulous selection and design process to create indicators that resonate with these significant aspects. These indicators will enrich the monitoring and reporting process by providing a more nuanced and comprehensive perspective on the social protection system's impacts, thereby supporting informed decision-making and policy development.

SOCIEUX+ Action 2023-35 will facilitate peer-to-peer exchanges to concretely formulate indicators for monitoring the social protection system. This will be facilitated by European public experts mobilized by SOCIEUX+. The specific details of this interaction will be outlined by experts in advance of their mission, and documented in a methodological note collaboratively created with the Partner.

For the second activity in Belgrade, a series of workshops and meetings will be organized by the Institute to jointly identify and update the list of indicators for monitoring the social protection system. This list will incorporate insights derived from studying EU best practices and understanding their indicator selection and implementation methods.

PI will be working with, public experts mobilized by SOCIEUX+. To ensure mutual understanding during the activity's implementation, translation and interpretation services from Serbian to English and vice versa will also be necessary throughout the mission.

Responsibilities:

- Experts mobilized by SOCIEUX+:

The mission shall be implemented both 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 (Institute), 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 (Institute):**

Republic Institute for Social Protection (Institute) shall work in collaboration with experts supporting the preparation and implementation of the activity.

The Institute 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
- 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 interpretation for the on-line preparatory meetings, all documents needed for the desk research of the experts and debriefings with the experts mobilized by SOCIEUX+
- 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 Institute, 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
- **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+.

4.1.3. Activity 3 - Analysing and updating the Institute's guidelines of methodology applicable to monitoring and reporting of social system

For the third activity in Belgrade, a series of workshops and meetings will be arranged with the Institute to collectively identify gaps and revise the Guidelines for monitoring the social protection system. This process will integrate insights drawn from presenting EU best practices and understanding their approach to monitoring and reporting on the social system.

The activity involves a review of the existing guidelines and methodology that the Institute employs for monitoring and reporting within the social protection system. This review will entail integrating the recommendations and indicators developed in the previous activities. The experts will work to identify strengths and weaknesses of the current approach, along with areas that require enhancement. The updated guidelines will encompass refined methodologies and strategies, aligning with best practices and addressing any gaps or limitations in the current system.

Furthermore, the deliverable will consist of designed templates for reports and briefs. These templates will offer a structured format that enhances the communicative and informative aspects of the reports. The designs will ensure that the content is presented in a visually appealing manner, rendering it more accessible and understandable to various stakeholders, including decision-makers and the wider public.

The public experts mobilized by SOCIEUX+ will work closely with the selected representatives of PI. To ensure mutual understanding during the activity's implementation, translation and interpretation services from Serbian to English and vice versa will also be necessary throughout the mission.

Responsibilities:

- Experts mobilized by SOCIEUX+:

The mission shall be implemented both 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 (Institute), 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 (Institute):

Republic Institute for Social Protection (Institute) shall work in collaboration with experts supporting the preparation and implementation of the activity.

The Institute 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
- 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 interpretation for the on-line preparatory meetings, all documents needed for the desk research of the experts and debriefings with the experts mobilized by SOCIEUX+
- 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 Institute, prepare all relevant documents for the realization of the activity (questionnaires, scripts for the meetings, 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+.

4.2 Deliverables

4.2.1 Pre-mission deliverables for Activities 1, 2 and 3

- 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

- **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 - Annex 1 of the AcR:** Updated list of key indicators for the monitoring efficiency, impact and accountability of the social protection system validated by the participants on the workshops and Institute officials.

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.

- **D1 - Annex 1 of the AcR:** Developed set of gender, human rights, vulnerability and inequality indicators validated by the Institute officials and the participants on the workshops

4.2.4. Final deliverables for Activity 3

- **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 - Annex 1 of the AcR:** Updated guidelines of methodology for monitoring and reporting including designed templates for reports/briefs

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 monitoring and reporting on social protection (research design oriented)**

Area(s) of expertise:

Social Protection, Research, Social Security Statistics, Data Analysis, Data Collecting, Survey
Social Security Administration & Inspection

Specific skill(s) & competency(ies):

1.1.Governance, transparency & accountability; 5.1.Monitoring & Evaluation(M&E); 5.4.Statistics & business intelligence; 9.3.Theoretic models & approaches

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 research on social protection system and indicators
- Knowledge and experience of EU and EU Member States’ policies in the field of social protection, social statistics and social policy development
- Experience design and delivery of researches, policy briefings and reports
- 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 gender, human rights and vulnerability

Area(s) of expertise: Gender Equality, Discrimination, Social Protection, Research, Social Security Statistics

Specific skill(s) & competence(s):

5.1. Monitoring & Evaluation(M&E); 5.4. Statistics & business intelligence; 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 5 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society.
- Relevant experience related gender mainstreaming, human rights based approach, inequality
- Experience in capacity building and developing informative dissemination materials and policy briefs
- Experience in communication and sensitization strategies and approaches
- 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

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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/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 workload⁵

Activity #1	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	3	10	/	4	17
Expert (#2)	3	10	/	3	16

⁵ Please note that travel days are not considered as working days.

Total Activity #1	6	20	/	7	33
Activity #2	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	3	5	/	4	12
Expert (#2)	3	5	/	3	11
Total Activity #2	6	10	/	7	23
Activity #3	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	3	10	/	4	17
Expert (#2)	3	10	/	3	16
Total Activity #2	6	20	/	7	33

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 by⁶:
 - 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 format⁷.
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab "Call for experts" and click on "Apply."

If more information is needed, please contact SOCIEUX+ by email at experts@socieux.eu with the reference number of the application.

Collaborative or interested institutions wishing to make expertise available for a specific call for application may directly contact the team of SOCIEUX+ at experts@socieux.eu.

7.2 Selection of experts

In principle, SOCIEUX+ mobilises experts from the public administrations and mandated bodies of EU member states, and practitioners working for social partners, including:

- Practitioners, civil servants and employees from publicly mandated bodies.
- Collaborators and employees of social partner institutions, such as trade unions and employer associations; and,

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

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

- 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+.

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.

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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