

## TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** SOCIEUX 2023-20 MONTENEGRO

**Action title:** Strengthening the organizational capacities of the Pension and Disability Insurance Fund to achieve the objectives of the Public Administration Reform Strategy

**Partner institution:** Pension and Disability Insurance Fund of Montenegro

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

- Activity 2 – Assessing of services and communication with the insured persons and beneficiaries

**Tentative dates of implementation and location:**

*Activity 2 – **December 25<sup>th</sup> 2023, to February 16<sup>th</sup>, 2024** (with an on-site mission from January 22<sup>nd</sup> to February 2<sup>nd</sup>, 2024)*

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

- Activity 2 : Expert 1 (principal) – Expert in organisational assessment (quality service delivery oriented)
- Activity 2 : Expert 2 – Expert in organisational assessment (communication oriented)

**Workload:**

Activity 2 - Expert 1 : Total 18 days (8 days at distance; and 10 days onsite)


Activity 2 - Expert 2 : Total 16 days (6 days at distance; and 10 days onsite)

**Call for experts' reference:** **23-20/MNE/2/1, 23-20/MNE/2/2**

**Version - #:** \_\_\_\_  
2023

Draft

Final

 Date: 02 November

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## **1 BACKGROUND INFORMATION**

### **1.1 Country overview**

Montenegro is a country located in South-Eastern Europe, the capital is Podgorica. Montenegro has a surface of 13 883 square meters and a population of approximately 613,100 inhabitants. Montenegrin is the official language of the country, other languages such as Bosnian, Croatian, Serbian and Albanian are also used officially. Montenegro is a parliamentary republic and gained its independence from Serbia in 2006. Presidential elections took place in April, electing Jakov Milatovic at the head of the country. Montenegro has a GDP of 5.9 billion USD. Inflation has been significant but its effect on the cost of living was limited. High public debt and a deteriorating global environment require the country to pursue fiscal consolidation and reforms. According to the World Bank data from 2018, GINI index for Montenegro was 36.8 %.

Between 2003 and 2021, the Human Development Index (HDI) value in Montenegro has been increased from 0.756 to 0.832, which represents a jump of 10.1%. According to the latest HDR, life expectancy in Montenegro is 76.3, which is 2.3 years more than in 2003. Citizens of Montenegro have an average of 12.2 years of education, or 1.7 years more than in 2003, while compared to that year, the gross national income per capita (GNI - purchasing power parity expressed in US dollars) in 2021 was increased by about 52.1% and amounts to 20,839. Amendments to the Law on pensions and Disability Insurance, as well as the Law on Protection of Employed Citizens of Montenegro Posted to Work Abroad were adopted in December 2021. According to the Law, current pensionable age is 66 for men and 61 and 9 months for women, this increase will now be capped at 66 for men, and 64 for women (which will be reached in 2028).<sup>1</sup>

Negotiation for the accession of Montenegro to the EU began in June 2012. To this date, 33 negotiating chapters are opened, of which three have been provisionally closed. Montenegro continued to implement the Stabilisation and Association Agreement (SAA). In the 2022 report, EU Commission declared that Montenegro has some level of preparation in the field of social policy and employment. Montenegro has been advised to continue the reform of the social protection system based on the Roadmap of Social Protection Reform. In the coming year, Montenegro should advance work on the drafts of the Law on Insurance, Law on investment funds, Law on alternative investment funds and Law on pension funds to be aligned with EU legislation. The relevant chapter for the Action is 19, related to Social Policy and Employment.

### **1.2 Sector situation**

In addition to the rule of law and economic changes, public administration reform is one of the three pillars of the EU enlargement process. The European Commission places the public administration reform of candidate countries at the heart of its enlargement policy, as seen by the new enlargement methodology, which entails a cluster-based approach to negotiations. The new methodology focuses a greater emphasis on fundamental changes, beginning with the rule of law, the operation of democratic institutions, and public administration, as well as a more stable economy in the candidate nations.

The 2022-2026 Public Administration Reform Strategy of Montenegro provides guidelines for the development of the institutional framework. The key values of the reform are a public administration based on diversity, equality, inclusion, anti-discrimination, and equal opportunities for all, with the goal of enhancing the public administration by 2026 so that it is accountable, serves citizens and the economy, and is professional, efficient, transparent, and inclusive.

In the structure of current public expenditure, the largest share refers to mandatory expenditures related to Gross wages and Transfers for social protection through which the entitlements in the field of social protection, pension and disability insurance and entitlements in the field of healthcare are financed, which account for about 60 percent of the total current expenditure. Having in mind the growing trend of the gross wage bill and the need to put it under control, i.e. to relieve public expenditure in that respect, the Government of Montenegro will take steps in the coming period to

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<sup>1</sup> Press release "Crises halt progress, Montenegro among countries with very high development", UNDP Human Development Report 2021/2022, <https://www.undp.org/montenegro/press-releases/crises-halt-progress-montenegro-among-countries-very-high-development>

meet the goal of gradually reducing the total wage bill through, first of all, the optimisation of jobs. The first step towards that was the adoption of a new organizational structure of the state administration, which rationalised the number of ministries and administrative bodies.

In the context of a pandemic, the need for additional financing of the healthcare system, on the one hand, and the reduction of revenues generated by contributions conditioned by negative developments in the labour market, on the other, deepened the existing deficits of the Pension and Disability Insurance Fund and the Health Insurance Fund, and thus further jeopardized the sustainability of public finances.

Additional pressure on public finances was created by the adoption of the Law Amending and Supplementing the Law on Pension and Disability Insurance in July 2020. In order to ensure the adequacy of pension benefits, the amendment to the aforementioned Law changed the way of adjusting pensions, so that instead of the previous formula of adjusting with 75 percent of inflation measured by the consumer price index and 25 percent of wage growth, the concept of the so-called "rotating formula" was introduced: 75 percent of a higher parameter and 25 percent of a lower parameter.<sup>2</sup>

In dialogue with the social partners, amended Law reduced the retirement age from 67 to 66 for men and 64 for women. In addition, ¼ of the insurance period that is most unfavourable for the insured person has been excluded from the calculation period used for calculating the amount of pension, until 2030. A novelty in the Law is also the increase of the nominal amount of the lowest pension to 145 euro.

All the mentioned changes represent an advantage from the aspect of social justice, but they put additional pressure on public spending.

To continue with social security system reform (including sectors of pensions, employment, etc.), it is important to further support the national level reform of the disability assessment system. The undertaking is funded by EUD and recognized by the Economic Reform Program (2021.-23.) as priority. This complex process implies new, national unified criteria and an establishment of a unique institution (instead of the current 30 commissions) for disability determination for the six sectors: Social, Employment, Pension, Education, war veterans and Health.<sup>3</sup>

Demographic trends and a high level of the grey economy present the most important risks for the financing of the social protection system in Montenegro, as it is highly dependent on social contributions. In addition, the already high tax wedge limits the scope for increasing contribution rates. Thus, future reforms should focus on increasing aggregate income through education, pension and other structural reforms.<sup>4</sup>

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<sup>2</sup> EUROPEAN SOCIAL POLICY NETWORK (ESPN) Thematic Report: Assessment of Pension Adequacy, 2021, [file:///D:/Downloads/ESPN\\_ME\\_pension-adequacy\\_2021%20\(1\).pdf](file:///D:/Downloads/ESPN_ME_pension-adequacy_2021%20(1).pdf)

<sup>3</sup> European Commission Report on Montenegro 2022- Inputs of the United Nations System in Montenegro

<sup>4</sup> EUROPEAN SOCIAL POLICY NETWORK (ESPN), Financing social protection, 2019, [file:///D:/Downloads/ESPN\\_ME\\_financing\\_social\\_protection\\_2019%20\(1\).pdf](file:///D:/Downloads/ESPN_ME_financing_social_protection_2019%20(1).pdf)

### **1.3 Role of partner institution in the sector**

The Pension and Disability Insurance Fund of Montenegro (hereinafter: the Fund) is an organization that exercises public powers when deciding on rights and obligations of pension and disability insurance, has the status of a legal entity with the rights, obligations, and responsibilities established by the Law on Pension and Disability Insurance and by the Fund's Articles of Association, and has been established to ensure the exercise of the rights of all insured persons. The fund functions independently and is accountable to the Government of Montenegro for its actions. According to the Pension and Disability Insurance Law and the Fund's Articles of Association, the Fund is administered by a Board of Directors nominated and removed by the government. A director selected by the Board of Directors manages the fund.

The unique Professional Service of the Fund, which comprises of the Central Service with headquarters in Podgorica and nine regional units, performs professional and other activities to ensure the seamless, reasonable, and successful execution of tasks under the Fund's jurisdiction. Pension and Disability Insurance Fund of Montenegro's objective is to guarantee the legal, effective, and timely exercise of pension and disability insurance rights.

The Fund lacks defined development paths in terms of work structure and the launch of new services that adhere to modern business practices. Therefore, it is necessary to determine the direction of development and modernization of the organization and work of the Fund to ensure the improvement of the quality of service to the insured and beneficiaries of pension and disability insurance rights, while ensuring the publicity and transparency of the work as a principle of operation.

## **2 ACTION DESCRIPTION**

### **2.1 Overall objective**

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

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

- To improve the quality of service and transparency to the insured and beneficiaries of pension and disability insurance rights in line with the Public Administration Reform Strategy.

### **2.3 Expected results**

- The direction of development and modernization of the organization and work of the Fund for the phased realization of the objectives of the Public Administration Reform Strategy is defined
- The organizational capacities of the Fund to enhance efficiency and accountability in view to achieve the objectives of the Public Administration Reform Strategy are strengthened

### **2.4 Final deliverables**

- A report on organizational and functional assessment of the Fund including a rationale for recommendations on future necessary changes
- A report on assessment of services and communication with the insured persons and beneficiaries including a rationale for recommendations on future necessary changes
- Strategic Plan for the Fund based on the assessments

## **3 METHODOLOGY**

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

The main focus of this action is to support the Pension and Disability Insurance Fund of Montenegro to develop a strategic plan, in line with the Public Administration Reform Strategy and based on the

functional and organizational assessment. Developed plan will be consistent with EU objectives, the UN agenda, and national umbrella documents.

At the end of this action the Fund will determine the direction of development and modernization of the organization and work to ensure the improvement of the quality of service to the insured and beneficiaries of pension and disability insurance rights. In longer term, the Fund will improve the quality of service and transparency to the insured and beneficiaries of pension and disability insurance rights.

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

The following activities are currently planned for the action:

- Activity 1- Assessing organisational and functional capacities of the Fund: human resources, processes and plans monitoring
- Activity 2- Assessing of services and communication with the insured persons and beneficiaries:
- Activity 3- Co-drafting a Strategic Plan for the Fund based on the assessments

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

- Activity 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:

- Good governance;
- Human rights (including rights people living with disabilities, vulnerable groups and older people);
- Social and economic inclusion of vulnerable groups.

## 4 ACTIVITIES DESCRIPTION

### 4.1 Tasks

The activity involves assessing the quality and effectiveness of services provided by the Fund. It aims to determine how well the institution meets the needs and expectations of the insured persons and beneficiaries. The assessment encompasses various aspects, such as: type of services provided, the responsiveness to the requests, the clarity of communication channels, the level of satisfaction of insured persons and beneficiaries, and the Fund's ability to address their concerns or feedback. By conducting this assessment, the experts will identify areas for improvement, propose recommendations to enhance the services, and therefore contribute to Funds overall communications. The assessment will allow the Fund to plan allocation resources effectively to areas that have the significant impact on satisfaction of the insured persons and beneficiaries and overall performance. It will contribute the Fund to align its strategic goals and objectives with the needs of insured persons and beneficiaries, ensuring that the institution's vision remains relevant and focused.

The assessment should cover at least (non-exhaustive list):

1. Services: assessing the efficiency, accuracy, and accessibility of services offered, data privacy and feedback mechanisms; understand the current state and identify strengths and weaknesses; an overview to the efforts of the e-services development, analysing of the capacities and existing infrastructure to determine its capacity and capability to support the e-services, recommend suitable

solutions. Review how well the current delivery model is working and suggest alternative delivery model options. Compare service delivery and management practices with other EU countries practices.

2. Communication: assessing of the communication channels, whether they meet the communication needs of insured persons and beneficiaries, provision of relevant and timely information flow and feedback mechanism; identify opportunities for improving data collection, storage, processing, and usage practices.

For the second activity in Podgorica, a series of meetings and workshops will be organized with the Fund and their stakeholders to identify challenges of service delivery model and communications. Experts will assess the situation and propose areas of possible improvements, with the elaboration of a rationale for the future necessary changes.

The assessment will be developed through:

- An analysis based on desk research: Law on Pension and Disability Insurance, Law on Civil Servants and State Employee, Articles of Association of the Pension and Disability Insurance Fund of Montenegro, Decree on Criteria for Internal Organization and Systematization of the State Administration, Rulebook on the Internal Organization and Systematization of Jobs in the Professional Service of the Pension and Disability Insurance Fund of Montenegro, 2023 Work Program of the Pension and Disability Insurance Fund of Montenegro, 2022 Work Report of the Pension and Disability Insurance Fund of Montenegro, 2018-2022 IT Strategy of the Pension and Disability Insurance Fund of Montenegro, 2022-2026 Public Administration Reform Strategy etc.
- Interviews with the working group, insured persons and beneficiaries and any other relevant stakeholders.

### **Responsibilities:**

#### The Experts' team:

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

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

#### The Partner Institution:

The partner institution shall work in collaboration with experts supporting the preparation and implementation of the activity. The partner institution shall facilitate the organisation of the activity with regards to the following aspects:

- providing one or more resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation and implementation of the activity, including sharing relevant information, contacts and technical inputs with the experts
- convening participants to the meetings and ensuring their participation to the peer-to-peer dynamic, including external stakeholders as relevant.
- the material organisation on site (including covering the costs of premises and logistics)
- the Partner will support SOCIEUX+ in identifying interpreters/translators English/Montenegrin
- the Partner will provide interpretation for the on-line preparatory meetings and debriefings with the experts mobilized by SOCIEUX+.

### **Tasks:**

Minimum tasks expected from the experts shall include:

#### Preparation:

- Get substantial knowledge of the local context; review relevant policy and institutional framework documents.

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

#### Implementation:

- During the mission, conduct consultations with the Partner's key staff and other stakeholders deemed necessary to meet for the purpose of this activity as per methodology and agenda. The partner institution shall facilitate and arrange the meetings.
- To present the outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalisation.
- Participate in the briefing/debriefing with the Delegation of the European Union in the country.
- At the end of the exchanges, ask the workshop participants to complete a short feedback questionnaire (link provided by SOCIEUX+).
- Channel to SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

#### Reporting:

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

## 4.2 Deliverables

### **Deliverables:**

Intermediary deliverables (to be transmitted to SOCIEUX+ FMT at least three working days ahead of the activity)

- A methodological note (max. 3 pages), detailing the working approach, tools and methods to be employed, and a risks analysis
- A detailed agenda (max. 2 pages), detailing the meetings and working sessions to be held, persons to meet

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

- **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.
- Deliverable (D1) – Annex of the AcR: A report on assessment of services and communication with the insured persons and beneficiaries including a rationale for recommendations on future necessary changes. The assessment aims to determine on the strengths and weaknesses of the Fund's service provision and communication channels as well as to provide recommendations for their improvement that will be integrated in the Strategy document.



## 5 REPORTING AND SUBMISSION OF DELIVERABLES

### 5.1 Formats

All deliverables and products of the activity (notes, reports, presentations, etc) shall comply with the formats and templates provided by the SOCIEUX+ Team.

All deliverables are to be submitted in electronic in electronic editable versions [Microsoft Word 97-2003 [doc], PowerPoint 97-2003 [ppt] and Excel 97-2003 [xls]; or in equivalent OpenDocument format). Non-editable electronic document such as in Portable Document Format (PDF) shall not be accepted.

Templates for electronic presentations during the activity/mission are provided by the SOCIEUX+ Team. These templates are in Microsoft PowerPoint format and comply with the SOCIEUX+ Corporate Image standards. These templates are to be used as a sole format by all members of the expert mission team. They are to be used for all presentations by the experts during and for the activity/mission. The use by the experts of their own, or their organisation(s), templates or formats are not allowed unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

All versions of deliverables or other products used or produced during activity/mission by the experts shall include the following disclaimer:

*"Disclaimer:*

*The responsibility of this publication sole lies with its authors. The European Union, the European Commission, the implementation partners of SOCIEUX+ and the SOCIEUX+ Staff are not responsible for any use that may be made of the information contained therein."*

Please refer to the expert information package for further guidance on communication and templates.

All deliverables are to be provided in English.

### 5.2 Submission and approval

All deliverables versions (drafts, final or other) shall be submitted directly and only to SOCIEUX+ Team, unless otherwise instructed in writing [by email] to the experts by the SOCIEUX+ Team.

#### 5.2.1 Pre-mission deliverables

- Pre-mission deliverables shall be submitted no later than 5 working days before the start of activity or departure of the mission of the experts, whichever is the earliest.
- Pre-mission deliverables will be shared and reviewed by the SOCIEUX+ and the Partner Institution. Feedback on the deliverables should be provided to the Principal Expert at latest 2 days before the start of activity or departure of the mission of the experts, whichever is the earliest. Comments and recommendation of this feedback shall be taken into account for the implementation of the activity/mission by the experts. Only the mission agenda shall be resubmitted with revision if requested by the SOCIEUX+ Team.

#### 5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted no later than 10 working days upon completion of the activity or return of the experts.
- Feedback to the first draft version of the report should be provided 10 working days after its submission.
- Inclusion of the feedback on drafts versions is expected 5 working days upon reception of the comments by the principal expert. (In general, no more than one round of feedback and revision is required, unless the quality of the deliverables is considered unsatisfactory by the SOCIEUX+ Team or/and the Partner Institution.)
- Final versions of the deliverables should be approved or rejected no later than 10 working days upon their submission to the SOCIEUX+ Team.



- Final payments and reimbursement of travel costs to experts can only be authorised upon approval of the final version of the deliverables by SOCIEUX+.

## 6 REQUIRED EXPERTISE

### 6.1 Expertise profile

#### **Principal expert (Expert #1): Expert in organisational assessment (quality service delivery oriented)**

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

- Social security, Pension Schemes, Disability Benefits
- **Specific skill(s) & competency(ies):**
- *Organisational management; Service delivery; Monitoring & Evaluation(M&E); Change management & facilitation*

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

- a. The education type and level required:  
"Master's" degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master's degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:

- o An intermediate academic degree ("Bachelor", equivalent degree or diploma requiring three (3) years of formal education) with an additional three (3) years of working/professional experience; or,
- o A first-level academic degree ("License", equivalent degree or diploma requiring two (2) years of formal education) with an additional five (5) years of working/professional experience.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- b. The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s): Seven (7) years.
- c. Required language knowledge: English
- d. Other essential qualifications
- Demonstrated knowledge of functioning of pension and disability insurance funds
  - Experience providing advice to public institutions in adapting and optimizing their processes and structures
  - Experience in designing and evaluating services in institutional framework
  - Relevant experience in the design, implementation, monitoring and evaluation of strategies/plans and processes for pension and disability funds in the EU, in particular in relation to outreach and service provision insured and beneficiaries

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

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

e) A previous experience in delivering short-term technical assistance in international cooperation;

f) A previous professional experience in Western Balkans

g) Language(s): Montenegrin, or Serbian, Bosnian, Croatian

#### **Expert # 2: Expert in organisational assessment (communication oriented)**

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

- *Social security; Pension Schemes, Disability Benefits*

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

- *Communication & social marketing; Information management systems; Monitoring & Evaluation(M&E); Organisational management;*

**Requirements (essential/required):**

- a. The education type and level required:

“Bachelor’s” degree (or equivalent academic degree or diploma requiring three (3) years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the bachelor’s degree can be replaced by a combination of:

- o A first-level academic degree (“License” or equivalent) with an additional two (2) years of professional experience in one or more relevant fields.

The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

- b. The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s): Five (5) years.
- c. Required language knowledge: English
- d. Other essential qualification:
- Experience providing advice to public institutions in adapting and optimizing their processes and structures
  - Relevant experience and knowledge of digital communication tools and channels, as well as institutional media and communication
  - Experience in advising on information management in the public institutions
  - Experience in supporting public institutions in drawing up their strategic plan and developing strategic management tools

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

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

- a) A previous experience in delivering short-term technical assistance in international cooperation;
- b) Professional recognized certification(s): communication and social marketing, design and implementation of institutional communication strategies, information and communication technologies
- c) A previous professional experience in Western Balkans
- d) Language(s): Montenegrin, or Serbian, Albanian, Bosnian, Croatian

**6.2 Estimated workload**

	<b>Preparation</b>	<b>Onsite work</b>	<b>Reporting &amp; deliverables</b>	<b>Total</b>
Principal expert (#1)	4	<b>10</b>	4	18
Expert (#2)	3	<b>10</b>	3	16
<b>Total experts</b>	<b>7</b>	<b>20</b>	<b>7</b>	<b>34</b>

## 7 APPLICATIONS

### 7.1 Call for experts

All calls for experts for SOCIEUX+ activities are published online on the SOCIEUX+ website. Interested experts should submit their application on the SOCIEUX+ 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>5</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>6</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+.

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<sup>5</sup> SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

<sup>6</sup> Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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

Various options for contracting:

- **Active French Public Expert** (Contracted by Expertise France)  
Engagement letter (+ Cumulation of activities form signed by the hierarchical superior)
  
- **Active Spanish Public Expert**  
Spanish public experts will be contracted by FIIAPP (letter of designation – signed by the hierarchical superior - and letter of commitment).
  
- **UE Public Expert** (including French and Spanish retired or private experts)
  - Service contract with expert (+ Authorization document from employer indicating the dates of the activity + a tax identification number (TIN) to be able to issue an invoice; or
  - Umbrella company: experts who do not have a tax identification number allowing them to invoice for services in their country, but they are authorized to sign temporary employment contracts according to local legislation, or
  - Service contract with institution: experts who do not have a tax identification number that allows them to work in their country and cannot sign an employment contract according to local legislation.

## 7.4 Financial compensations

Contract officials or active-duty or retired employees are entitled to standard fixed allowances of 350 euros per working day worked. The fees of private consultants are negotiated according to their number of years of relevant expertise and the standard scale of SOCIEUX+.

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

National regulations on remuneration and compensation of public employees and civil servants apply and may limit the payment of allowances by SOCIEUX+. The responsibility for compliance and verification lies with individual experts and their institutions of origin. The payment of income or other taxes is the sole responsibility of the mobilised experts and/or their organisations.

## 7.5 Travel costs

All travel expenses for the 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**

[...Text...]

## **11 ANNEXES**

[...Text...]

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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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