

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: SOCIEUX 2023-39 NORTH MACEDONIA

Action title: *Support for assuming the responsibilities under the EU regulation on data and information exchange within social security systems coordination scheme*

Partner institution: *Ministry of Labour and Social Policy of North Macedonia*

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

- *Activity 1 – To assess data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI*
- *Activity 2 – To provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI*

Tentative dates of implementation and location:

Activity 1 - from 29 January to 22 March 2024

29 January – 16 February 2024: preparatory phase

19 February – 01 March 2024: onsite mission

04 March-15 March: drafting and finalization of deliverables

18-22 March 2024: validation of the deliverables by the partner institution

Activity 2 – from 22 April to 14 June 2024

22 April – 10 May 2024: preparatory phase

13-24 May 2024: onsite mission

27 May – 07 June 2024: drafting and finalization of deliverables

10-14 June 2024: validation of the deliverables by the partner institution

Expert positions and responsibilities (by activity):

- Activity 1, 2 : Expert 1 (principal) – *Expert in Social Security & Information Management Systems*
- Activity 1, 2 : Expert 2 – *Expert in Social Security & Information Management Systems*

Call for experts' reference: 23-39/MKD/1-2

Version - 1

☐ Draft

☒ Final

Date: 08 December 2023

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Partnership led by

Co-financed by the European Union

1 BACKGROUND INFORMATION

1.1 Country overview

North Macedonia was the first Western Balkan economy to sign a Stabilisation and Association Agreement (SAA) with the European Union in 2001, setting the way forward for an alignment with EU standards. The country applied for EU membership in 2004 and the status of EU candidate country was given a year later. Since 2009, the EU Commission has continuously recommended that the EU Council opens accession negotiations with North Macedonia. In 2020, the Council decided to open accession negotiations and these negotiations started in mid-2022 with the first intergovernmental screening meetings¹. The negotiations are important as the EU continues to be the biggest trading partner of North Macedonia (almost 80% of the Macedonian exports go to EU, 2021). Moreover, the recent history of EU enlargement since the early 2000s shows that it helped the new member states to catch up regarding economic development and standards of living.

Since its independence in 1991, North Macedonia has made considerable progress in terms of economic development and integration into global economic markets. Despite these achievements the country is experiencing one of the slowest income convergences with EU countries compared to peers in the Western Balkan region. In 2000, the country's per capita income was 28 per cent of the average EU income; in 2021 the national income per person reached 38 per cent of the EU average. Economic growth in the past two decades has been very volatile due to several external and domestic shocks including the deep political crisis in the years 2014 to 2017 and the COVID-19 pandemic. While the economy recovered faster than expected from the COVID-19 pandemic (GDP growth rate in 2021: +4 percent), the effects of Russia's invasion in Ukraine (energy crisis, inflationary pressures) have reduced the growth momentum. The much-needed recovery of labour markets is lagging. The pandemic has further exposed the structural labour market problems from before COVID-19 and the current slowdown of global economic growth. These challenges are low labour market participation, in particular among women and youth, low job creation, inadequate earnings, and unproductive work.

1.2 Sector situation

In the Republic of North Macedonia, social security coordination with other countries is regulated by bilateral social security agreements that North Macedonia has concluded with other countries. The scope of these bilateral agreements includes pension and disability insurance, health insurance, insurance in case of unemployment and child allowances.

With the entry of North Macedonia into the EU, Regulation No. 883/2004 on coordination of social security systems and its amendments, as well as Regulation No. 987/2009 implementing Regulation 883 of 2004 and its amendments will apply. With the application of these regulations, bilateral social security agreements with EU member states will cease to be valid.

The Pension and Disability Insurance Sector within MLSP is responsible for bilateral social insurance agreements.

With the start of the negotiation process for the full membership of the Republic of North Macedonia in the European Union, it is considered necessary for the MLSP to harmonize the national legislation with the EU legislation.

From the bilateral screening with the European Commission came the obligation to harmonize the national legislation in the field of social security for the purpose of applying Regulation no. 883/2004 for the coordination of the social security systems and Regulation no. 987/2009 for the implementation of Regulation no. 883/2004 in the next five years.

1.3 Role of partner institution in the sector

¹ [North Macedonia \(europa.eu\)](https://europa.eu)

The Ministry of Labour and Social Policy (MLSP) is responsible for the design and implementation of labour market policies, social security, equal opportunities, protection and prevention of discrimination in line with international standards and principles.

The MLSP accomplishes its mission in the following areas of competencies:

- regulation of labor market relations;
- design and implementation of social protection policies;
- design of policies for equal opportunities, protection and prevention of any kind of discrimination;
- conducting a humane population policy, aligned with economic and social development.

2 ACTION DESCRIPTION

2.1 Overall objective

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

2.2 Specific objective (purpose)

To enhance capacity of the institutions for implementation of the EU social security coordination regulations [883/2004](#) and [987/2009](#)

2.3 Expected result

Organizational capacities of relevant institutions for data and information exchange in view of the integration of North Macedonia into the EU social security coordination mechanisms are strengthened

2.4 Final deliverables

D1 - Assessment report on the data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)

D2 - Roadmap on data and information exchange process needed in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)

2.5 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – To assess data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)
- Activity 2 – To provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)

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

- **Activity 1** – To assess data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)

- **Activity 2** – To provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information)

2.6 Inclusion of cross-cutting issues

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

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

3 ACTIVITIES DESCRIPTION

3.1 Tasks (for Activity 1 and Activity 2)

ACTIVITY 1 - To assess data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI

Methodology:

This activity will aim at assessing data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information).

The experts will work on **identifying the exact needs in terms of participation to the EU Member States Social Protection Committee; identify data collection needs/requirements** in view of the future and gradual integration into the EESSI (Electronic Exchange of Social Security Information); review existing social security mechanisms in force (given the 13 bilateral agreements concluded with EU Member States), **as well as any other key and related identified tasks that shall be performed in the framework of EU SP coordination mechanism.**

The experts will be participating to a series of on-site meetings/workshops with the Ministry of Labour and Social Policy, as well as with all relevant social protection institutions needed, and to be involved in the framework of the definition of the data collection process. These may include – amongst other institutions, the Agency for the Supervision of Fully Pension Insurance; the Pension and Disability Insurance Fund; the Health Insurance Fund; the Employment Service Agency; Local Employment Centre of the City of Skopje; as well as relevant line Ministries (Ministry of Health).

The final list of stakeholders (relevant social protection institutions) will have to be confirmed by the partner institution and defined by the experts in the methodological note and mission agenda. Given that information flows may come from various data sources involving a series of social protection institutions, a high level of engagement from the partner institution and degree of inter-institutional coordination shall be required as a basis for the successful achievement of both activities envisaged for this Action.

The experts may organize relevant preparatory meetings with the EESSI Secretariat representatives and analyse any interlinkages/complementarities with the EESSI (Electronic Exchange of Social Security Information).

The exact list and scope of the necessary meetings to be convened and institutions relations building needed in the framework of Activity 1 will be defined in the methodological note and mission agenda prepared by the experts in the preparatory phase, in close coordination with the partner institution.

Tasks:

Experts' team:

The principal expert will lead the onsite mission. 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.

The experts shall conduct the activity by reviewing beforehand the necessary documentation shared by the partner institution ahead of the onsite mission; shall take part in a series of workshops with the Partner Institution, based on the co-developed methodology and agenda.

The experts shall hold a meeting with the EUD in Skopje as part of their onsite mission agenda, and if considered relevant hold any meeting(s) with relevant stakeholders active in the area of technical assistance in social protection, such as ILO Country Office and the World Bank (development loan "[SIAP](#)").

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 or more resource-persons to support the experts in the material and technical organisation, as well as in brainstorming sessions and in elaboration of recommendations,
- contributing to the technical organisation of the activity, including sharing relevant background documents (including relevant Social Protection Policy/Strategic Documents), contacts and technical inputs with the experts,
- **Facilitating the liaison and support in organizing the relevant meetings with relevant social protection institutions - and other line Ministries as needed,**
- convening participants to the meetings and ensuring their participation, including external stakeholders,
- the material organisation on site (including premises and logistics).

ACTIVITY 2 - To provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI

This activity will build on the findings of activity 1, and will aim at provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information).

Tasks:

The experts will work on developing a **roadmap** on data and information exchange process needed in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information) [outlining amongst other elements the **milestones/breakdown steps for data collection process**, and building on D.1 findings]. The roadmap may include amongst other elements the definition of data sources, data flows, data quality assurance, responsibilities, frequency of information exchange, ... – and identify the different steps and milestones needed in view of the future integration into the EESSI.

The experts will be participating to a series of on-site meetings/workshops with the Ministry of Labour and Social Policy, as well as with all relevant social protection institutions needed, and to be involved in the framework of the definition of the data collection process. These may include – amongst other institutions, the Agency for the Supervision of Fully Pension Insurance; the Pension and Disability Insurance Fund; the Health Insurance Fund; the Employment Service Agency; the Local Employment Centre of the City of Skopje; as well as relevant line Ministries (Ministry of Health).

The final list of stakeholders (relevant social protection institutions) will have to be confirmed by the partner institution and defined by the experts in the methodological note and mission agenda. Given that information flows may come from various data sources involving a series of social protection institutions, a high level of inter-institutional coordination shall be required as a basis for the successful achievement of both activities envisaged for this Action.

The experts may organize relevant preparatory meetings with the EESSI Secretariat representatives, and analyze any interlinkages/complementarities with the EESSI (Electronic Exchange of Social Security Information).

The exact list and scope of the necessary meetings to be convened and institutions relations building needed in the framework of Activity will be defined in the methodological note and mission agenda prepared by the experts in the preparatory phase, in close coordination with the partner institution.

Tasks:

Experts' team:

The principal expert will lead the onsite mission. 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.

The experts shall conduct the activity by reviewing beforehand the necessary documentation shared by the partner institution ahead of the onsite mission; shall take part in a series of workshops with the Partner Institution, based on the co-developed methodology and agenda.

The experts shall hold a meeting with the EU Delegation in Skopje as part of their onsite mission agenda, and if considered relevant hold any meeting(s) with relevant stakeholders active in the area of technical assistance in social protection, such as ILO Country office and the World Bank (development loan "[SIAP](#)").

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 or more resource-persons to support the experts in the material and technical organisation, as well as in brainstorming sessions and in elaboration of recommendations,
- contributing to the technical organisation of the activity, including sharing relevant background documents (including relevant Social Protection Policy/Strategic Documents), contacts and technical inputs with the experts,
- **Facilitating the liaison and support in organizing the relevant meetings with relevant social protection institutions - and other line Ministries as needed,**
- convening participants to the meetings and ensuring their participation, including external stakeholders,
- the material organisation on site (including premises and logistics).

3.2 Deliverables (valid for both activities)

3.2.1 Pre-mission deliverables

- P1: A **methodological note**, detailing the working approach, tools and methods to employ, a risks analysis, etc. The Methodological Note shall not exceed 3 pages (excluding cover page and annexes).
- P2: A **activity/mission agenda**, detailing the meetings and working sessions to be held, persons to meet, etc. The Activity/mission Agenda shall not exceed 2 pages.

3.2.2 Final deliverables

- **D.1: Assessment report on the data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI [for Activity 1]**
- **D.2: Roadmap on data and information exchange process needed in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI (Electronic Exchange of Social Security Information) [for Activity 2]**
- An **individual Expert Mission Report** (ExMR) in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX+. The expert team may also submit a single-joint ExMR report if they prefer to do so (see instructions on the template).
- An individual completed **Expert Feedback Form** (ExF) completed online (see instructions and link on the ExMR template).
- A **collective Activity Report** (AcR) in SOCIEUX+ format (template provided). This AcR is to be produced jointly by the mission team. It is intended for the Partner Institution, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted in during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.

4 REPORTING AND SUBMISSION OF DELIVERABLES

4.1 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.

4.2 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.

4.2.1 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.

4.2.2 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+.

5 REQUIRED EXPERTISE

5.1 Expertise profile (for both activities)

Principal expert (Expert 1) : Expert in Social Security & Information Management Systems

Area(s) of expertise: Social Security Legislation – Social Security Policy / Data collecting

Specific skill(s) and competency(ies) of expertise: Information management systems

Requirements (essential/required):

- a) The education type and level required:

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

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

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

- b) At least seven (7) years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society – on **social security legislation/policy**;
 - c) Required language knowledge:
 - Fluent in English, written and oral;
- N.B.: Translation and interpretation services may be commissioned by SOCIEUX+.
- d) Other essential qualification(s):
 - Relevant experience in information management systems;
 - Relevant experience in data collection in the field of social security (definition of data sources, data flows, data quality assurance, responsibilities, frequency of information exchange, ...);
 - Acute sense of diplomacy and institutional relations.

Additional assets (advantageous in selection):

- e) Experience in the participation to the EU Social Protection Committee and/or with the Electronic Exchange of Social Security Information (EESI) and/or with EU SP coordination mechanism;
- f) A previous experience in delivering short-term technical assistance in international cooperation;
- g) A previous professional experience in Western Balkans
- h) Computer fluency (Zoom, PowerPoint etc.) and good presentation skills.

Expert #2 : Expert in Social Security & Information Management Systems

Area(s) of expertise: Social Security Legislation – Social Security Policy / Data collecting

Specific skill(s) and competency(ies) of expertise: Information management systems

Requirements (essential/required):

- i) The education type and level required:

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

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

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

- j) At least seven (7) years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society – on **social security legislation/policy**;
- k) Required language knowledge:
- Fluent in English, written and oral;
- N.B.: Translation and interpretation services may be commissioned by SOCIEUX+.
- l) Other essential qualification(s):
- Relevant experience in information management systems;
 - Relevant experience in data collection in the field of social security (definition of data sources, data flows, data quality assurance, responsibilities, frequency of information exchange, ...);
 - Acute sense of diplomacy and institutional relations.

Additional assets (advantageous in selection):

- m) Experience in the participation to the EU Social Protection Committee and/or with the Electronic Exchange of Social Security Information (EESI) and/or with EU SP coordination mechanism;
- n) A previous experience in delivering short-term technical assistance in international cooperation;
- o) A previous professional experience in Western Balkans
- p) Computer fluency (Zoom, PowerPoint etc.) and good presentation skills.

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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.

5.2 Estimated workload²

ACTIVITY 1 – To assess data collection needs in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI

Estimated workload [in days]						
	Preparation	Onsite work	Distance work	Travel	Reporting & deliverables	Total
Principal expert (#1)	4	10			5	19
Expert (#2)	3	10			4	17

² Please note that travel days are not considered as working days.

Total experts	7	20			9	36
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ACTIVITY 2 – To provide recommendations on the required data collection process/mechanism in view of the future integration of North Macedonia into the EU social security coordination mechanisms, with a specific focus on the data collection requirements/needs for future integration into the EESSI

Estimated workload [in days]						
	Preparation	Onsite work	Distance work	Travel	Reporting & deliverables	Total
Principal expert (#1)	4	10			5	19
Expert (#2)	3	10			4	17
Total experts						36

6 APPLICATIONS

6.1 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 by³:
 - 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 format⁴.
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.

³ SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) - Regulation (EU) 2016/679.

⁴ Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

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.

6.2 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

6.3 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.

6.4 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.

6.5 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).

7 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.

8 CODE OF CONDUCT

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to the delivery of products. The SOCIEUX+ Team will assist experts to fulfil their assignments by supporting and advising on preparing background materials before meetings. The SOCIEUX+ team will collect feedback from partner institutions and relevant stakeholders to ensure that mission reports and recommendations are delivered to national authorities, the EU Delegations in the partner countries and the European Commission.

The experts mobilised are not representing SOCIEUX+ or the EU. Technical opinions and recommendations expressed are their own. They shall not express negative opinions on the implementation of actions supported by SOCIEUX+ to third parties. Nevertheless, they shall be aware of SOCIEUX+'s objectives and functioning, and promote its services to the best of their knowledge, whenever possible and feasible.

The experts shall perform their duties in the Partner Country in a way that is fully compliant with and respectful of the local institutions, policies and cultural behaviours. They shall particularly adopt culturally-sensitive behaviour when dealing with their local counterparts.

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ABOUT SOCIEUX+

The SOCIEUX+ Facility was established and funded by the EU through the European Commission's Directorate-General for International Partnerships (DG INTPA) and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). The Facility is co-funded by France, Spain, and Belgium. It is implemented by a partnership composed of Expertise France (the partnership lead), Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development Agency (Enabel).

The Facility's general objective is to expand and improve access to better employment opportunities and inclusive Social Protection systems in Partner Countries. Its specific objective is to enhance Partner Countries' capacity to design, manage, and monitor inclusive, effective, and sustainable employment strategies and Social Protection systems through short-term, peer-to-peer technical assistance and knowledge development.

SOCIEUX+ recognises the impact of Social Protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable Social Protection and employment systems. SOCIEUX+ also complements the efforts made through other EU initiatives.

The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

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