

# TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** SOCIEUX+ 2023-44 LBN

**Action title:** *Establishment of a Unified Registry for Social Protection (URSR) in Lebanon: Supporting MoSA to take ownership of the project and validated the USR target system model*

**Partner institution:** *Ministry of Social Affairs of Lebanon (MoSA)*

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

- *Activity 2 – Support to PMU in ensuring technical validation of the URSP target model*
- *Activity 3 – Support to PMU in ensuring technical validation of the systems' integration workstreams*

**Tentative dates of implementation and location:**

- *Activity 2 – April 1<sup>st</sup>, 2024 to May 17<sup>th</sup>, 2024 (hybrid)*
- *Activity 3 – June 17<sup>th</sup>, 2024 to August 3<sup>rd</sup>, 2024 (hybrid)*

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

- *Activity 2 : Expert 1 (principal) – Social Security Administration & Inspection - ICT*
- *Activity 2 : Expert 2 – Technology – ICT*
- *Activity 3 : Expert 1 (principal) – Social Security Administration & Inspection - ICT*
- *Activity 3 : Expert 2 – Technology – ICT*

**Workload:**

- *Activity 2 : Expert 1 (principal) – 18*
- *Activity 2 : Expert 2 – 16*
- *Activity 3 : Expert 1 (principal) – 18*
- *Activity 3 : Expert 2 – 16*

**Call for experts' reference:** 2023-44 LBN/2/1 & 2023-44 LBN/2/2

**Version - #:** 1

☐ Draft

☒ Final

**Date:** December 18<sup>th</sup>, 2023

# 1 BACKGROUND INFORMATION

## 1.1 Country overview

Lebanon is a small, diverse, and historically significant country located in the Middle East, on the eastern coast of the Mediterranean Sea. It has a surface of 10,452 square kilometres and a population of 5,593,000 inhabitants (World Bank, 2021); this figure includes non-Lebanese citizens and refugees, such as Syrians (around 1.5 millions), Palestinians (around 170,000) and Iraqis (a few thousands). The capital is Beirut and the currency in use is the Lebanese lira/pound. Lebanon is known for its diverse geography, with a coastal area and the interior dominated by the rugged Lebanon Mountains. The Beqaa Valley lies between the mountains and is an important agricultural region.

Lebanon gained its independence on November 22<sup>nd</sup>, 1943, and it became a parliamentary republic. The country has seen several conflicts unfold on its soil, such as the Lebanese Civil War (1975–1990), which had a profound impact on the country, leading to significant social, political, and economic challenges; the South Lebanon conflict (1985–2000); the Second Lebanon War in 2006; several clashes between 2007 and 2010; and the spillover of the Syrian Civil War from 2011 onwards. Regarding the situation of Syrian refugees in the country, the 2021 Vulnerability Assessment of Syrian Refugees (VaSyR) conducted by UNHCR, UNICEF and WFP found that 88% of Syrian refugee families are living in extreme poverty, an increase from 55% in mid-2019. Ongoing hyperinflation has reduced the purchasing power of cash assistance for both food and non-food items. Refugee households cannot cover their basic needs through employment income alone.

Lebanon faces a major socioeconomic crisis due to increasing public debt and high fiscal deficit. In recent years, the economic and financial crisis has been further exacerbated by the explosion of port of Beirut (August 2020) and the economic impact of the COVID-19 pandemic (2020–21). Nominal GDP dropped approximately to US\$52 billion in 2019 to an estimated US\$23.1 billion in 2021. As a result, Lebanon was reclassified by the World Bank as a lower-middle income country, down from upper middle-income status, in July 2022. The decline in average income coupled with triple-digit inflation and a severe currency depreciation have negatively affected the population's purchasing power, with the effects of inflation disproportionately affecting the poorest as well as the middle class. The social impact of these crises is significant with a drastic reduction in provision of basic services, steep unemployment (29% in 2022) and an increasing share of the population living under the poverty line. Municipalities are also affected and are under increasing pressure and barely able to provide basic services due to a lack of funding. The level of vulnerability among the Lebanese population has also increased, resulting in increased competition over scarce resources. This leads to increased frustrations, tensions and overall increased protection risks.

## 1.2 Sector situation

Social protection in Lebanon faces significant challenges due to the country's political, economic, and social instability. Lebanon's social protection system is fragmented and lacks comprehensive coverage. Various government agencies, non-governmental organizations (NGOs), and international organizations provide assistance, but coordination and integration are limited.

Lebanon has limited social assistance programs that target vulnerable populations. The National Poverty Targeting Program (NPTP) was launched in 2011 to provide cash transfers to low-income families, but its reach and effectiveness were constrained by funding shortages and political challenges. Nevertheless, it provides badly-needed monthly social assistance allowances to some 65,000 extremely poor Lebanese families. The programme has three components: 1) Health: comprehensive health coverage for beneficiaries in public and private hospitals through a waiver of 10-15 percent co-payments for hospitalization; 2) Education: Registration fee waivers and free books for students in secondary (including vocational) public schools; and 3) Food assistance, via the electronic card. Since October 2021, food assistance has evolved to provide unrestricted cash assistance to extremely poor Lebanese families. The health and education components have been traditionally covered by the government, but have been put on hold since 2020, due to shrinking fiscal capacity to cover the costs of these two types of allowances.

A second social assistance instrument is the Lebanon Emergency Crisis and Covid-19 Response Social Safety Net Project (ESSN), which provides the same amount of monthly social allowances to

an additional 147,000 extremely poor Lebanese families. The programme is funded through a concessional loan by the World Bank.

Other programmes provide social assistance to vulnerable individuals (persons with disabilities), social services and social security benefits; these include an EU and Germany funded project providing cash for education for children enrolled in public education: social grants provided by UNICEF and ILO through EU funding, to disabled individuals between 18 and 28 years old; other types of regular social assistance provided through NGOs and international donors.

Social assistance programmes are not fully aligned among themselves and with other social protection sub-sectors (services, insurance, employment promotion). They operate using different databases of beneficiaries, which do not communicate between each other. Lebanon lacks a unified repository for data on social protection and assistance, something that severely hampers management and fair distribution of allowances. It is therefore of the utmost importance to have systems that allow to know the assistance provided through different programmes to poor households. Furthermore, a more granular picture of the ongoing social assistance allowances would help to step up the efforts and financial support by the Government, the World Bank, the EU and other international development partners, as well as to better plan and manage social protection in the country.

### 1.3 Role of partner institution in the sector

The core mandate of the Ministry of Social Affairs (MoSA) is to provide social protection and assistance. Its mandate can be broadly defined around thematic areas and functions.

- Social Welfare: Providing assistance and support to vulnerable populations, such as the elderly, people with disabilities, and low-income individuals and families.
- Social Development: Implementing programs and initiatives aimed at improving the overall social well-being of the population, including education and healthcare services.
- Labor and Employment: Addressing labour-related issues, including employment policies, workers' rights, and job training programs.
- Civil Society and NGOs: Collaborating with non-governmental organizations (NGOs) and civil society groups to address social challenges and promote community development.
- Refugee Affairs: In the context of Lebanon's history with hosting a large number of refugees, including Palestinians and Syrians, the Ministry of Social Affairs is involved in providing services and support to refugee populations.
- Family and Child Welfare: Developing policies and programs to protect and support families and children in Lebanon.

In addition, the MoSA has been appointed to lead the finalisation of the National Social Protection Strategy, drafted with the support of the UNICEF and ILO. To this purpose, the Minister of Social Affairs steers the reactivation of a structured dialogue on Social Protection, together with the Social Protection Coordination Forum (SPCF) that was set up within the Lebanon Reform Recovery and Reconstruction Framework.

The Prime Minister of Lebanon formed an Inter-Ministerial Technical Committee on Social Policy, chaired by the Minister of Social Affairs, to lead coordination on Social Protection among the Government, donors, UN, WB and NGO actors. In this framework, the MoSA holds a responsibility to contribute to the design and implementation of adequate tools for information and database management, such as a Unified Single Registry of beneficiaries of social assistance allowances.

## 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)

S1. To support MoSA in taking ownership of the TA project for the establishment of a Unified Registry for Social Protection (URSP), particularly by establishing appropriate governance mechanisms and procedures

S2. To support MoSA in the process of assessing and validating the URSP target system model as well as its integration with existing social protection systems

## 2.3 Expected results

R1. A Programme Management Unit (PMU) overseeing the technical implementation of the TA project is established

R2. The validation criteria and mechanisms applicable to the TA project's outputs are in place/available to the PMU

## 2.4 Final deliverables

D. 1. Terms of Reference of the PMU, including the main functioning arrangements, workflows with the TA consultancy and the Programme Steering Committee (PSC), and the job descriptions of members

D. 2. A strategic orientation note outlining post-TA project's scenarios as to prepare the ground for sustainably running a national URSP; the strategic outlook will particularly focus on the necessary governance arrangements and the requirements of financial sustainability

D. 3. Guidelines establishing a) Conditions/criteria/resources and b) Procedures for the reception, analysis, evaluation and recommendations (validation or changes) to the URSP target model

D. 4. Guidelines establishing a) Conditions/criteria/resources and b) Procedures for the reception, analysis, evaluation and recommendations (validation or changes) to the systems integration workstreams

# 3 METHODOLOGY

## 3.1 General methodology (of the action)

The increase of social support to dependent households due to multiple external factors and crisis, challenges the capacity of the Ministry of Social Affairs (MoSA) to effectively target and administer existing social support programs. Today's social assistance programmes in Lebanon are not fully aligned; for example, the two largest social assistance programmes in Lebanon, the Emergency Social Safety Net (ESSN) programme and the National Poverty Targeting Programme (NPTP), are run by the government but implemented separately. Today's lack of a unified repository for data on Social Protection, severely hampers the distribution and effectiveness of protection. Harmonization is therefore capital for gaining effectiveness and efficiency on the distribution of social help to poorest Lebanese households.

In that purpose, a EU-funded long-term technical assistance project (hereafter, the 'TA project') will start in early 2024 and aim to develop a United Registry for Social Protection (URSP) of beneficiaries of all social assistance programs, benefits and schemes. Previous SOCIEUX+ Action (2023-02) has supported MoSA and the EU Delegation in Beirut to develop the technical specifications of such project therefore constituting the basis for the selection of a consultancy in charge of running it.

SOCIEUX's intended contribution through the present Action is to support MoSA in setting-up the necessary internal capacity to strategically steer the TA project and to provide technical endorsement to its outputs, therefore ensuring national ownership. However, a condition subsists for the Action to deploy according to the plan, namely the timely and consistent set-up of a Programme Management Unit (PMU) by the MoSA following activity 1, thus allowing following activities to play their role towards the set-up of the PMU's capacities and functioning arrangements needed to participate to the TA project.

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

The following activities are currently planned for the action:

- A. 1: Support to PMU design and strategic outlook
- A. 2: Support to PMU in ensuring technical validation of the URSP target model
- A. 3: Support to PMU in ensuring technical validation of systems' integration workstreams

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

- A. 2: Support to PMU in ensuring technical validation of the URSP target model
- A. 3: Support to PMU in ensuring technical validation of systems' integration workstreams

### 3.3 Inclusion of cross-cutting issues

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

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

## 4 ACTIVITIES DESCRIPTION

The **first activity** aims to support MoSA to set-up the Project Management Unit (PMU) and to define its role and functioning arrangements in the framework of the TA project. The PMU is meant to constitute the interface between the private consultancy in charge of the implementation of the TA project and the Government of Lebanon (GoL), ultimate beneficiary of the TA project, represented by the Project Steering Committee (PSC), and MoSA in particular with reference to the deployment of the TA project. A strong and capable PMU will allow GoL to take an active part into the TA project, rather than passively receiving it.

The PMU's role is at the technical level, particularly in the process of reception, review, and validation of the technical outputs produced by the TA project. In this regard, the PMU will contribute to the TA project's governance inasmuch it will provide technical recommendations for the PSC to take strategic decisions and play a steering role within the TA project. To this end, Activity 1 will be about jointly preparing the Terms of Reference (ToRs) of the PMU, including the definition of its role, functioning and relations with the private consultancy responsible for the implementation of the TA project and with the PSC. The ToRs shall also include job descriptions of the members of the PMU, in a way to define the nature of competences that shall be incorporated. Experts shall also channel to SOCIEUX+ (in the AcR) any specific difficulty they may see towards the timely and consistent set-up of a PMU, being this a condition to move forward with the remaining planned activities.

Activity 1 will serve a second purpose, too. The overall goal of ensuring national ownership to the TA project and its outcomes will be better served by outlining strategic scenarios relating to the post-TA project URSP's governance and financial sustainability. Experts will therefore help to briefly outline a strategic outlook for URSP and derive possible orientations aiming at political, organizational and financial sustainability, which may apply once the Registry will be delivered to GoL/MoSA.

The **second activity** aims supporting MoSA to set up the necessary organizational structure, policies and procedures to perform the functional and technical evaluation of the URSP target model, to ensure its compliance with the GoL strategy and with the functional and technical requirements included on the original ToR published by the EU Delegation and the commitments included on the TA Project.

Due to the complexity of the expected deliverables, the TA project PMU will require the support of a number of specialised resources, individuals and committees, with the knowledge, skills and experience necessities to analyse, evaluate and produce recommendations on the appropriateness of the URSP target model framework, taking into account the expected deliverables defined inside the TA project. In addition to defining the resources, the PMU should be responsible of enforcing the presentation, validation and approval processes for the TA project deliverables.

Specially for the validation of the URSP target model, considering that this component is the cornerstone of the future USRP system, ensuring that all functional and technical requirements are

fulfilled is key for the success and future of the URSP system. In this regard, through this Activity, the PMU, in addition of having access to the right resources, should have well defined policies and procedures for the reception, analysis and evaluation of the intermediate and final deliverables of the TA project.

Those policies and procedures should also include the interaction, adjustment and approval processes, not only between the PMU experts' committees, but also for the executive validation and approval to be produced by the PSC, as a key element for the deliverables acceptance formal procedure.

To this end, Activity 2 will be about jointly preparing the Rules of Engagement (RoE) of the mechanisms for the formal acceptance of deliverables of the TA project by the PSC, prepared, facilitated and controlled by the PMU. The RoE shall also include the description of suitable skills and responsibilities of the members of the different committees, as well as the individual PMU advisors that should participate.

The activity will have mostly a presential format, allowing to get substantial knowledge of the target model components being prepared within the TA project and to design and build the deliverables jointly with MoSA's management and the PMU team.

The **third activity** aims supporting MoSA to set up the necessary organizational structure, policies and processes to perform the functional and technical evaluation of TA project deliverables on the three system development workstreams: a) the ESSN – NPTP convergence; b) the establishment of a single Grievance system (GRS); and c) the establishment of a single Monitoring & Evaluation (M&E) system, to ensure its compliance with the GoL strategy and with the functional and technical requirements included on the original ToR published by the EU Delegation and the commitments included on the TA Project.

Due to the complexity of the current systems environment and the ongoing development initiatives on each of the three workstreams by different partners (WB, WFP and others), the TA project PMU will require the support of a different specialised resources, individuals and committees, with the knowledge, skills and experience necessities to analyse, evaluate and produce recommendations on the functional and technical design, as well as the development, implementation and rollout plans to support and ensure the success of each of the three mentioned workstreams.

In addition to identifying the right resources, the PMU should be responsible for preparing the operational framework for systems oversighting and acceptance, including project tracking mechanisms, risk management and mitigation initiatives, quality assurance, deliverables acceptance protocols, etc.; all that in order to ensure the compliance of deliverables and the success of the overall project.

Having the mechanisms for ensuring that all functional and technical requirements are fulfilled, is key for the successful integration of the operational systems (ESSN, NPTP and others), the single unified Grievance Redress System (GRS) and the Monitoring & Evaluation System (M&E).

Those policies and procedures should also include the interaction, adjustment and approval processes, not only between the PMU experts' committees, but also for the executive validation and approval to be produced by the PSC, as a key element for the deliverables acceptance formal procedure.

To this end, Activity 3 will be about jointly preparing the participation and control mechanisms for the TA project consultants on these development initiatives, not only from the technical standpoint, but also from the managerial and control and acceptance of deliverables for each development workstream.

Activities 2 and 3 will have mostly a presential format allowing to get substantial knowledge of the development workstreams requirements and planning and to design and build the deliverables jointly with MoSA's management and the PMU team.

## 4.1 Tasks

The principal expert will lead the on-site mission. He/she will be responsible for the delivery of all deliverables of the activity (see below Section **Erreur ! Source du renvoi introuvable.**). He/she will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+.

The main tasks of the mission team include:

**Task 1** – Preparation of the mission



- 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 Team establish in close consultation with the PI the mission's methodology and agenda;
- Submit the methodology and agenda for approval by the SOCIEUX+ Team (1 week before the mission);
- Taking part in the pre-departure briefing with SOCIEUX+ Team (during the week before the mission).

**Task 2** – Implementation of the mission

- Review and finalise the agenda of the mission and list of stakeholders to be consulted with the PI upon arrival;
- Organise, as necessary, a brief presentation of the objectives and methodology of the mission for the PI and relevant stakeholders;
- Provide a briefing on the background of the request and objectives of the mission to the EU Delegation, if applicable;
- As per agenda, conduct consultations with the PI's executives and staff, and relevant stakeholders, including the EU Delegation;
- Compile the initial findings and main recommendations in a brief presentation that will be used for the final consultation and debriefing on-site;
- Channel to SOCIEUX+ Communication officer any material that can be useful to inform the public about the FFM mission (pictures, interviews, brief notes or articles); and,
- At every stage of the implementation, liaise with the SOCIEUX+ Team in case of doubts on the eligibility of proposals raised by the PI, politically sensitive developments, or any other relevant issue that may require a formal position of SOCIEUX+.

**Task 3** – Final consultation and debriefing

- Present the initial findings and main recommendation of the Experts Team to the PI, relevant stakeholders and the EU Delegation; and,
- Collect the feedback of the PI, relevant stakeholders and the EU Delegation for inclusion, as possible, in their final deliverables and mission reports.

**Task 4** – Finalisation and submission of the deliverables

Elaborate the intermediary and final drafts of the final deliverables for review and commenting by SOCIEUX+, the PI and eventually other stakeholders.

## **4.2 Deliverables**

### **4.2.1 Pre-mission deliverables**

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

### **4.2.2 Final deliverables**

- D1 (*for both activities 2 and 3*): 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).
- D2 (*for both activities 2 and 3*): An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- D3 (*for both activities 2 and 3*): 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.

- D4 (*final deliverable of activity 2*): Guidelines establishing a) Conditions/criteria/resources and b) Procedures for the reception, analysis, evaluation and recommendations (validation or changes) to the URSP target model.
- D5 (*final deliverable of activity 3*): Guidelines establishing a) Conditions/criteria/resources and b) Procedures for the reception, analysis, evaluation and recommendations (validation or changes) to the systems integration workstreams.

## 5 REPORTING AND SUBMISSION OF DELIVERABLES

### 5.1 Formats

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

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

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

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

*"Disclaimer:*

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

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

All deliverables are to be provided in English.

### 5.2 Submission and approval

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

#### 5.2.1 Pre-mission deliverables

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

#### 5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted no later than 10 working days upon completion of the activity or return of the experts.



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

## 6 REQUIRED EXPERTISE

### 6.1 Expertise profile

#### **Principal expert (Expert #1):**

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

- *Social Security Administration & Inspection - Information and Communication Technologies*

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

- *Organisational management & administration - Organisation structures, roles and arrangements*

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

- a) The education type and level required:

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

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

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

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

Seven (7) years.

- c) Required language knowledge:

English

- d) Other essential qualification(s):

Experience in designing, steering and/or administering governance bodies and/or technical support units within large Management Information Systems (MIS) projects.

Experience on budgeting and financial planning of large MIS project’s life cycle

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

- a) Language(s): French, Arabic

#### **Expert 2:**

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

- *Technology – Information & Communication technology*

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

- *Information & communication technology - Information management systems*

**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:

- a. 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(s):

Experience in defining functional and technical requirements within large Management Information Systems projects

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

- a) Experience on large scale systems integration project on multi-platform environments

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

## 6.2 Estimated workload<sup>1</sup>

Activity 2	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	4	7	3	4	18
Expert (#2)	3	7	3	3	16
<b>Total experts</b>	<b>7</b>	<b>14</b>	<b>6</b>	<b>7</b>	<b>34</b>

Activity 3	Preparation	Onsite work	Distance work	Reporting & deliverables	Total
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<sup>1</sup> Please note that travel days are not considered as working days.

Principal expert (#1)	4	7	3	4	18
Expert (#2)	3	7	3	3	16
<b>Total experts</b>	<b>7</b>	<b>14</b>	<b>6</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>2</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>3</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.

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

<sup>3</sup> Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

Interested candidates may download the **Guide for Experts and Collaborative Institutions** with detailed information on contracting with SOCIEUX+ at [www.socieux.eu](http://www.socieux.eu)

### 7.3 Contracting of public experts

Public experts can be on active duty or retired. Retired employees from international specialised agencies or cooperation agencies can also be mobilised, without regard to their former employer's collaborating with SOCIEUX+ on a specific action. Retired experts are considered as public experts for all purposes, benefits, and financial compensation provided by SOCIEUX+.

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

Various options for contracting:

1. **Active French Public Expert** (Contracted by Expertise France)

Engagement letter (+ Cumulation of activities form signed by the hierarchical superior)

2. **Active Spanish Public Expert**

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

3. **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**

Security clearance shall be granted upon travelling

## **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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