

## TERMS OF REFERENCE FOR FACT-FINDING MISSION

Terms of reference for fact-finding missions (ToRFc)

**Action code and partner country:** *SOCIEUX 2023-46 NORTH MACEDONIA*

**Action title:** *Legal framework for voluntary social insurance registration*

**Partner institution:** *Ministry of Labour and Social Policy (MLSP)*

**Tentative dates of implementation and location:**

March 18<sup>th</sup> to 20<sup>th</sup> , 2024 , in Skopje

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

Activity *Fact-finding Mission (FFM)* : Expert *1* – Social Security Legislation, Informal Economy

**Workload:**

Activity *FFM* - Expert *1* : Total: 3 days

**Call for experts' reference:** *23-46/MKD/FFM/1*

**Version - #:** 1

☒ Draft

☐ Final

Date: *February 02<sup>nd</sup>, 2024*

SOCIEUX+ is implemented by

Partnership led by



Co-financed by the European Union



## 1 BACKGROUND INFORMATION

### 1.1 Country overview

North Macedonia is a landlocked country of the south-central Balkans. It is bordered to the north by Kosovo<sup>1</sup> and Serbia, to the east by Bulgaria, to the south by Greece, and to the west by Albania. The capital is Skopje. Languages in use are: Macedonian, Albanian, Turkish, Romani, Serbian, Bosnian. Its population is of 2 103 330 people in accordance to census of 2021<sup>2</sup>. The country declared its independence in 1991, and gained UN membership in 1993 under the name Former Yugoslav Republic of Macedonia. In 2005 the country became a candidate for EU membership. In 2019 the name of the country changed to North Macedonia, after ratification by Greek and Macedonian parliaments, opening way for Greece to stop blocking its neighbour's intention to join EU and NATO. In 2021 the country ranked at 0,770 in the HDI value, which places the country in the high human development category, positioning it at 78 out of 191 countries and territories<sup>3</sup>.

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 meetings. 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).

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 has slowed in 2023. The economy grew more slowly in the first half of 2023 than it did in 2022, as weakening domestic demand was only partially offset by lower imports and higher net exports.

Economic growth in the past two decades has been very instable 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. In line with amendments to the Law on Personal Income adopted at the end of 2022, progressive taxation, which had been set to enter into force from 2023, was abolished.

### 1.2 Sector situation

In North Macedonia, social insurance includes pension and disability insurance (administered by the Pension and Disability Insurance Fund), health insurance (administered by the Health Insurance Fund), and unemployment insurance (administered by the Employment Fund). Governance of social insurance data is fragmented, whereby each institution acts in an autonomous manner. The reliance on bilateral and ad hoc agreements, and the absence of systemic integrated controls, means that any weakness in these inter institutional processes inevitably results in the various data registries being out of real-time synchronization. This means that benefits and services across all the

---

<sup>1</sup> This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

<sup>2</sup> [Specific country data | Human Development Reports \(undp.org\)](#)

<sup>3</sup> Ibidem

institutions are being decided and delivered using imperfect data, or data that have not yet been updated.<sup>4</sup>

Social security is an important dimension of the contractual arrangement and employment of a person, considered as one of the fundamental rights of employment relationship. Social insurance of informal self-employed persons is a rather complex issue of analysis and also for regulation. Two general patterns regarding the social security are observed North Macedonia. One category are workers who do not pay social contributions out of necessity, mainly the low-skilled workers who prefer cash payments either to receive higher take-home pay (also avoid paying back debts) or to avoid losing some social rights (guaranteed minimum income, pension, etc.). The other category, those who do not pay social security contributions out of choice, include workers who do not have confidence in the social system and/or have an option for a cheaper access to a social system, and at the same time have simple ways of non-payment such as receiving the payment abroad (in ICT and arts), or in cash (in arts or construction).<sup>5</sup>

The informal employment sector in North Macedonia remains extensive in the number of people employed, although a downward trend can be noticed in the period from 2008-2021. The share of informally employed in the total number of employed has decreased from 28.6% (2008) to 18.13% (2021). Informal employment represents 12.1% of total employment or 96,151 individuals in 2021 (Makstat database, 2022). The level of informality is higher among men, those aged 25-44 and those occupying elementary professions, and 36-39% of the informal workers are self-employed and unpaid family workers. Informal work is mostly found in agriculture, construction, retail and wholesale, motor repair, personal and house hold services, tourism and hospitality, dependent self-employed, disguised employed and digital labour platform workers etc. While the world of work has changed in North Macedonia as elsewhere, labour legislation and collective bargaining did not. This has left many new types of workers jobs (such as the gig economy) non-regulated and out of the social protection system, but also led to lost tax revenues for the state. Such a high level of informality carries significant costs, including insecure working conditions, distorted competition, and lack of protection in the workplace, violation of labour rights, a reduced tax base and lack of trust in public institutions.

A more recent overview of the digital work in Western Balkan (January 2022) also shows that North Macedonia is among leading countries in the region in terms of the number of freelancers and share in population. The rise of the “gig” or “on-demand” economy in recent years, where the work is mediated through online web platforms or apps has brought renewed attention to dependent self-employment and disguised employment. Workers in the gig economy are commonly classified as independent contractors, despite that they may be closely supervised and their “wage” is paid through a specific application or internet platform. Given that these forms of employment are not a formal employment relationship, these workers are excluded from the benefit of rights at work, such as paid sick leave, annual leave, minimum wage, social security, etc and do not enjoy the freedom of association (ILO, 2021).

Online work through digital labour platforms has raised many challenges for policymakers such as income under-reporting and tax non-compliance, lack of social protection and security, administrative registration of digital workers, etc. The key challenge is still the fact that most digital workers, both online and offline, are classified as self-employed. Hence, they fall outside the scope of labour laws, and cannot be part of a trade union under national law. They are not covered by collective bargaining agreements as there is no clearly attributable employer who would serve as a collective bargaining counterpart.

On a broader policy level, Strategy for Formalisation of the Informal Economy and Economic Reform Programmes are the most relevant for tackling the informal economy in the Country.

Strategy for Formalisation of the Informal Economy 2018-2022 related to the fight against informal economy from detection and repression towards deterrence and stimulation to formalize the informal activities. The Strategy objectives were linked to monitoring and detection of the informal economy, improving the environment for establishment and growth of companies, incentives for formalization of informal economic activities, encouraging the morale and reducing the tolerance of the informal economy. Since 18<sup>th</sup> of October 2022 by the governmental decision the Ministry of Finance overtook

---

<sup>4</sup> The World Bank - International Bank for Reconstruction and development project appraisal document <https://documents1.worldbank.org/curated/en/625871581303655307/text/North-Macedonia-Social-Insurance-Administration-Project.txt>

<sup>5</sup>ILO: Non-standard forms of employment in North Macedonia <https://sociojalendijalog.mk/wp-content/uploads/2022/03/NSE-EN-FINAL.pdf>

responsibility for coordination of the process of development of the Strategy for Formalisation of the Informal Economy 2023-2025 with the Action Plan in which process the Ministry of Labour and Social Policy participating with its representatives.

The Economic Reform Programmes – ERP 2023-2025 related to introduction and implementation of measures/instruments which enable compliance, strengthening of the labour and social security benefits and incentives for transition to formal jobs, in which measure the Ministry of Labour and Social Policy plays important policy level role.

### 1.3 Role of partner institution in the sector

Ministry of Labour and Social Policy performs works and duties related to employment, pension and disability insurance, as well as protection of employment. In its mandate, the ministry develops policies related to the incomes, standard of life and material security for temporary unemployed. Its scope also covers areas in family and children, gender equality, children and person with disability.

More specifically, the Ministry of Labour and Social Policy is entrusted with policy making, coordination, monitoring and evaluation of employment and labour related policies, including Informal Economy Strategy 2018-2022. The Ministry is also involved in process of development, implementation and reporting regarding the national Economic Reform Programmes aimed in improvement of economic policies and strengthen economic governance particularly in implementation of the Measure 15 of the Economic Reform Programme 2023-2025 : Introducing mechanisms for formalising informal work in sectors with high incidents of undeclared activities and enable compliance, strengthening of the labour and social security benefits for transition to formal jobs.

The Ministry is coordinating Chapter 19 that includes minimum standards in the areas of labour law, equality, health and safety at work, and anti-discrimination. The Government has committed to implementation and enforcement of the Acquis communautaire, including in the area of chapter 19 encompassing inter alia set of measures aimed at improving working conditions in platform work and social protection of the self-employed:

- Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions "Better working conditions for a stronger social Europe: harnessing the full benefits of digitalisation for the future of work" (COM (2021) 761 final, enclosed),
- Council Recommendation (2019/C 387/01) of 8 November 2019 on access to social protection for workers and the self-employed.

## 2 OBJECTIVES OF THE MISSION

SOCIEUX+ has received a request to support technical cooperation on December 27<sup>th</sup>, 2023 from the Ministry of Labour and Social Policy of North Macedonia, here-after the Partner Institution or PI. The request has been considered eligible by the SOCIEUX+ Team. The general and specific objectives of the request could be clarified with the requesting institution (see below). However, despite the efforts of SOCIEUX+ and of the PI it was not possible to define feasible expected results, activities and deliverables that would fit the mandate and type of assistance that SOCIEUX+ can provide, i.e. short-term technical cooperation through peer-to-peer exchanges among public experts. Additionally, the PI has previously submitted similar request that was cancelled 2023-25. At the moment SOCIEUX+ has several ongoing actions implementing with the same PI. This has further complicated the formulation of specific objectives and expected results remotely. Therefore, it was agreed with the requesting institution to organise a "Fact-finding" mission to assess the feasibility of a technical cooperation action and develop a realistic work plan that would fit the needs of the requesting institution. The FFM will be conducted by SOCIEUX+ Action Manager and Expert, on-site, from March 18<sup>th</sup> to 20<sup>th</sup>, 2024.

### 2.1 Overall objective of the original request

- ☒ Institutional capacities of employment, labour and social protection institutions are strengthened and reinforced.
- ☐ Access to employment and social protection is expanded to poor and vulnerable groups.
- ☐ Awareness and knowledge on social protection and decent work is increased.

## 2.2 Specific objective of the original request

The following specific objectives were formulated in the request by PI. They shall guide the work-plan development with the support of SOCIEUX+'s mobilised expert.

The specific objectives of the action in the request :

1. Contribute to a legal framework for voluntary social insurance registration of dependent atypical workers.
2. Strengthen national mechanisms for reducing undeclared work.

### 1.1 Expected results of the fact-finding mission

The expected results of the fact-finding mission are:

- If needed, revised specific objectives of one action to respond to the needs and gaps identified by the Partner Institution in their original request, are agreed;
- An assessment of the relevance and feasibility of support by SOCIEUX+ to respond to the specific objectives of the request is made by the Fact-Finding Mission (FFM) Team; and
- If feasible, a work plan, in line with the mandate, type of assistance, interventions and standard timeframe of 11 months of implementation for SOCIEUX+ support. In the negative, the reasons for the non-feasibility of an action are documented.

## 2.3 Final deliverables

The main final deliverable of the fact-finding mission will be the Formulation work plan (WPFc). The WPFc is based on the logical frame model for project planning used by the European Commission in its international cooperation. It shall include the objectives, results and deliverables of the proposed Action.

In addition, a Fact-finding Mission Report (FcMR) is expected at the end of the mission. This shall summarise of the findings and recommendations of the FFM Team regarding the feasibility and the implementation of the proposed action, if applicable.

The final deliverables of the FFM will be developed by the Action Manager with the support of the Technical Expert.

## 3 IMPLEMENTATION METHODOLOGY

### 3.1 Summary

The FFM Team will be responsible for developing the methodology of the mission. The focus of the preparation will be to ensure that the Team shall assess the needs, gaps and challenges identified by the PI and other relevant stakeholders. The mission shall also be based on a peer-to-peer exchange between the FFM Team and their counterpart/contact person designated by the PI. The Team will ensure a close and regular consultation on their findings and the development of their proposals with the PI. Local stakeholders, such as international cooperation partners, shall be informed of the mission and its preliminary findings/recommendations if deemed appropriate by the SOCIEUX+ Team and the PI. In all cases, briefings at the start and debriefings at the end of the FFM will be proposed to the EU Delegation's relevant staff in the country of the PI. The FFM Team will not formally or implicitly represent SOCIEUX+, its Implementation Consortium, the European Union, its Members or the European Commission.

The FFM Team will review the available documentation provided by SOCIEUX+ and the Partner Institution before planning and preparing the mission agenda. In particular, the FFM Team will familiarise itself with the mandate, type of assistance, interventions and support provided by SOCIEUX+. For this, the Team members will refer to the latest version of:

- SOCIEUX+'s Guide for Institutions & Social Partners in Partner Countries; and,
- SOCIEUX+'s Guide for Experts & Collaborative Institutions

Both guides describe the support and conditions of mobilisation of experts through SOCIEUX+.

As a reminder, SOCIEUX+ actions are short-term in their timeframe and interventions. Actions are to be implemented through 2-4 activities of 3 weeks maximum implemented by a team of EU Member States public experts, on-site or at a distance. The timeframe for the complete implementation of an action is of 11 months. SOCIEUX+ does not provide financial or in-kind support to its partner institutions, including funding of workshop venues or materials.

Further, the FFM Team will refer to the templates provided for the main final deliverables of the mission, in particular, the Formulation Work-plan (WPFc) template. This template provides a clear outline of an action supported by SOCIEUX+ and checklists with the main questions that the FFM Team should answer at the end of their mission. These questions cover all the criteria that the SOCIEUX+ Team needs to consider in its recommendation of an action to the European Commission. The European Commission may object to a proposed action independently of the recommendations of the FFM or SOCIEUX+ Team.

The findings and proposals of the FFM Team will be formulated in the SOCIEUX+ templates. All proposals discussed by or developed by the FFM Team with the PI do not formally bind SOCIEUX+, its Implementation Consortium, the European Union, its Members or the European Commission. The formal endorsement of part or in full of an action work plan will be sole of the SOCIEUX+ Team, who will formulate its recommendations for a non-objection for the implementation of an action to the European Commission's services in Brussels.

### 3.2 Inclusion of cross-cutting issues

SOCIEUX+ recognises the importance of including 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;
- Environmental sustainability;
- Human rights (including rights of children, people living with disabilities, vulnerable groups and minorities); and,
- Social and economic inclusion of vulnerable groups.

The FFM Team should ensure the consideration of cross-cutting issues during the formulation of the action. Whenever possible, they should proactively integrate a human-right-based approach and a gender perspective into their recommendations. A specific section and checklist to cover the cross-cutting issues are included in the work-plan template to be completed by the FFM Team.

## 4 ACTIVITIES DESCRIPTION

### 4.1 Tasks

The SOCIEUX+ Action Manager will lead the on-site mission. She/He will be responsible for the delivery of all deliverables of the activity (see below Section **Error! Reference source not found.**). She/He will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+. In doing so, he will count on the technical support provided by the expert across all phases of the activity.

The SOCIEUX+ Team will provide the FFM Team with the documentation to prepare the mission. These include, among others, SOCIEUX+ guidelines, documentation on the original request submitted by the PI and background documentation compiled by the PI. The latter shall be considered confidential unless otherwise confirmed by writing by the PI.

To ensure the finalisation of the deliverables, the FFM Team is expected to at least implement the following tasks:

#### Task 1 – Preparation of the mission.

- The FFM 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;



- Taking part in the pre-departure briefing with SOCIEUX+ Team (around 1 week before the mission); and,
- 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.

**Task 2** – Implementation of the fact-finding 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; and,
- As per agenda, conduct consultations with the PI's executives and staff, and relevant stakeholders, including the EU Delegation;
- Compile and document [in the FFM mission report] relevant documentation for the assessment of the requests and the action proposal; and,
- Compile the initial findings and main recommendation for a potential action 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 FFM 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 draft of the WPFc and FFM mission report.

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

- Elaborate the intermediary and final drafts of 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 be employed, a risks analysis, etc. The Methodological Note shall not exceed 3 pages (excluding the 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.

*No template is available for these documents. Documents shall be formatted in A4 page size, normal body text single-spaced, black font size 10, and single-spaced. A standard page is assumed to have, on average 500 words. All pre-mission deliverables are to be provided in English or Portuguese Language.*

### 4.2.2 Final deliverables

- D1: A collective Fact-finding Mission Report (FcMR) in SOCIEUX+ format (template provided). This FcMR is to be produced jointly by the FFM Team.

- D2: A Formulation Work-plan (WPFc) in SOCIEUX+ format (template provided). It is intended at being shared with the Partner Institution and key stakeholders of the proposed action.

## 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 documents, 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 writing [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 SOCIEUX+ and the Partner Institution. Feedback on the deliverables should be provided to the Action Manager and Expert at the latest 2 days before the start of activity or departure of the mission of the experts, whichever is the earliest. Comments and recommendations 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 on the first draft version of the report should be provided 10 working days after its submission.
- Inclusion of the feedback on draft versions is expected 5 working days upon reception of the comments by the expert. (Generally, 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 after 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

### 1.4 Expertise profile

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

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

Social Security Legislation, Informal Economy

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

- L&R manufacturing and development; P&S making and development; Programme/Project management; Research

##### **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):
  - familiarity with governance of technical assistance projects/programmes
  - familiarity with social insurance for non-standard forms of employment

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

- e) Higher level academic qualification(s): N.a.
- f) Professional recognised certification(s): N.a.
- g) Language(s): knowledge of Macedonian, Serbian, Croatian, Montenegrin and/or Albanian

!!!!!!

#### **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.

## 1.5 Estimated workload

	Preparation	On site	Travel	Reporting & deliverables	Total
Expert (#1)	2	3	2	2	9
<b>Total experts</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>9</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>6</sup>:
  - a. Providing contact details
  - b. Providing information on the competencies, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, *experts are encouraged to complete in most detail de sections on skills and competencies as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*
  - c. Uploading of a curriculum vitae, preferably in Europass format<sup>7</sup>.
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab "Call for experts" and click on "Apply."

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

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

### 1.6 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. The mobilisation of experts currently employed with specialised international

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

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

agencies is limited to activities and/or actions that are jointly implemented with that expert's agency of origin.

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)

## 1.7 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 servants or public employees.

## 1.8 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+.

No financial compensation is given to experts currently employed with specialised international agencies.

Retired experts are assimilated to 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.

## 1.9 Travel costs

All travel expenses for mobilising 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).

# 2 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.

# 3 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 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.

#### **4 OTHER CONSIDERATIONS**

The FFM will primarily focus on the by then selected EU-funded long-term technical assistance Project "Support for the Creation of a Unified Registry for Social Protection Lebanon", as governance and validation processes that are the object of the request shall directly relate with the Project and its actual deployment.

#### **5 ANNEXES**

N.a.

## TABLE OF CONTENTS

1	Background information .....	1
1.1	Country overview .....	1
1.2	Sector situation .....	1
1.3	Role of partner institution in the sector.....	1
2	Objectives of the Mission .....	3
2.1	Overall objective of the original request.....	3
2.2	Specific objective of the original request.....	4
2.3	Expected results of the fact-finding mission .....	4
2.4	Final deliverables .....	4
3	Implementation methodology.....	4
3.1	Summary .....	4
3.2	Inclusion of cross-cutting issues .....	5
4	Activities description .....	5
4.1	Tasks .....	5
4.2	Deliverables .....	6
4.2.1	Pre-mission deliverables.....	6
4.2.2	Final deliverables .....	6
5	Reporting and submission of deliverables.....	7
5.1	Formats.....	7
5.2	Submission and approval.....	7
5.2.1	Pre-mission deliverables.....	7
5.2.2	Final deliverables .....	7
6	Required expertise.....	8
6.1	Expertise profile .....	8
6.2	Estimated workload .....	9
7	Applications .....	9
7.1	Call for experts.....	9
7.2	Selection of experts .....	9
7.3	Contracting of public experts.....	10
7.4	Financial compensations .....	10
7.5	Travel costs .....	10
8	Communication & Visibility.....	10
9	Code of conduct .....	10
10	Other considerations .....	11
11	Annexes .....	11

## 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.



**Follow us at:**

www.socieux.eu



[www.twitter.com/socieuxplus](http://www.twitter.com/socieuxplus)



[www.linkedin.com/in/socieux-plus](http://www.linkedin.com/in/socieux-plus)



[www.flickr.com/people/socieux](http://www.flickr.com/people/socieux)



<http://goo.gl/qSByFu>