

## TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** *SOCIEUX 2023-36 MONTENEGRO*

**Action title:** *Capacity building for MLSW in the field of safety and health at work for coordinators in Montenegro*

**Partner institution:** *Ministry of Labour and Social Welfare*

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

- *Activity 3 – To coach the pool of trainers in the first piloting of the training modules for OSH coordinators*

**Tentative dates of implementation and location:**

*Activity 3*

*18 November – 06 December 2024: preparation phase*

*09 – 20 December 2024: onsite mission*

*23 December 2024 - 03 January 2025: drafting and finalization of deliverables*

*06-10 January: validation of the deliverables by the partner institution*

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

- *Activity 1, 2 : Expert 1 (principal) – Expert in Occupational Safety and Health*
- *Activity 1, 2 : Expert 2 – Expert in Occupational Safety and Health*

**Call for experts' reference:** **23-36/MNE/3**

**Version**

Draft

Final

Date: 09 April 2024

SOCIEUX+ is implemented by

Partnership led by



Co-financed by the European Union

## 1 BACKGROUND INFORMATION

### 1.1 Country overview

Montenegro is a country located in South-Eastern Europe, the capital is Podgorica. Montenegro has a surface of 13 883 square meters and a population of approximately 613,100 inhabitants. Montenegrin is the official language of the country, other languages such as Bosnian, Croatian, Serbian and Albanian are also used officially. Montenegro is a Parliamentary Republic and gained its independence from Serbia in 2006. Presidential elections took place in April 2023, electing Jakov Milatovic at the head of the country. Montenegro has a GDP of 5.9 billion USD. Inflation has been significant but its effect on the cost of living was limited.

Between 2003 and 2021, the Human Development Index (HDI) value in Montenegro has increased from 0.756 to 0.832, which represents a jump of 10.1%. According to the latest UNDP Human Development Report (HDR), life expectancy in Montenegro is 76.3, which is 2.3 years more than in 2003. Citizens of Montenegro have an average of 12.2 years of education, or 1.7 years more than in 2003, while compared to that year, the gross national income per capita (GNI - purchasing power parity expressed in US dollars) in 2021 was increased by about 52.1% and amounts to 20,839.<sup>1</sup>

Montenegro's position in the Gender Inequality Index has improved to 26 in the World. However, the Gini Index increased from 31.9% in 2018 to 39% in 2019, one of the highest scores in the region. The COVID-19 pandemic has reversed recent poverty reduction, but the government has tried to prevent further unemployment by introducing wage subsidies and other measures. According to the World Bank, poverty (income below \$5.5/day in 2011 PPP) increased to 20.4% in 2020 (an increase of 2 percentage points compared to 2019). Poverty rates have persisted in Montenegro over the past few decades due to high unemployment and low levels of income.

The at-risk-of-poverty rate was 24.5% in 2019, a 0.7 percentage point increase compared to 2018. The rural population, the unemployed, and children are all at a higher risk of poverty than other groups. The Roma, Ashkali, and Egyptian population, as well as displaced people, social welfare beneficiaries, pensioners, long-term unemployed, and people with disabilities, have been identified as vulnerable and at risk of social exclusion.

Negotiation for the accession of Montenegro to the EU began in June 2012. To this date, 33 negotiating chapters are opened, of which three have been provisionally closed. Montenegro continued to implement the Stabilisation and Association Agreement (SAA). In its 2023 progress report for Montenegro<sup>2</sup>, under chapter 19 (related to Social Policy and Employment), the European Commission declared that Montenegro has some level of preparation in the field of social policy and employment.

### 1.2 Sector situation

As mentioned above, in line with the 2023 EC progress report for Montenegro<sup>3</sup>, Montenegro has some level of preparation in the area of social policy and employment. Some progress was made during 2022/2023 on social protection through a significant increase in the expenditure on social benefits. In the coming year, the EC recommends that Montenegro should in particular:

→ strengthen the Employment Agency to enable it to efficiently play its role as a modern public employment service and to prepare it for the implementation of the Youth Guarantee and the future use of the European Social Fund (ESF);

→ continue efforts to reform the provision of active labour market policy measures with an emphasis on their labour market relevance, including work-based learning, and establish a continuous monitoring mechanism that will enable evidence-based active labour market policy design;

---

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

<sup>2</sup> EC Progress Report for Montenegro, [Montenegro Report 2023 \(europa.eu\)](https://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&plugin=1)

<sup>3</sup> Ibid

→ based on the Roadmap of reforms on social assistance and social and child protection services, establish a clear timeline and financial planning for the reform of the social and child protection system and start implementing the reforms.

Concerning **health and safety at work**, in December 2022 the government adopted the national strategy for occupational safety and health (2022-2027) and its 2023 action plan. There was no progress in setting up the occupational safety and health fund envisaged under the previous sector strategies (for 2010-2014 and for 2016-2020). During 2022/23, inspectors carried out 1 520 inspections in the field of occupational safety and health, including 14 investigations of work accidents (3 fatal accidents, 10 serious accidents and 1 collective accident). The Labour Inspection remained understaffed, with only 11 inspectors in charge of occupational safety and health.

In the area of **employment** policy, on 22 December 2022, the government adopted the 2023 action plan for employment. Monitoring the implementation of the action plan for employment and the national strategy for employment remains a challenge due to the lack of real-time and accurately disaggregated data. On 22 December 2022, the government adopted the action plan for the interoperability of selected information systems and databases that have a role in governing Montenegro's labour market. The plan sets out measures and activities required to bring about interoperability of the Employment Agency database with the tax administration databases. Appropriate exchange is also required with social welfare centres to enable high-quality monitoring of unemployed people. Several, mostly EU-funded, initiatives and activities started to strengthen the technical and human capacity of the Employment Agency. The local branches of the Agency remain understaffed. Multiple personnel and management changes and amendments to the Systematisation Act slowed down the reform process of the Employment Agency. The Working Group for the Youth Guarantee Programme is working with experts from the International Labour Organization and the European Training Foundation on improving the draft Youth Guarantee implementation plan.

The share of youth aged 15-29 in total registered unemployment in May 2023 was 19.92% (8 392 people, of whom 5 162 are women), compared to 23.83% (10 132 and 13 679 respectively) in 2021. The rate of NEETs among young people in 2022 decreased to 23.2%, compared to 26.5% in 2021. In 2022, the labour market partially recovered compared to 2021. The overall activity rate grew from 54.4% in Q4 2021 to 59.9% in Q4 2022. The employment rate was 51.2% in Q4 2022, compared with 46.1% in Q4 2021. The unemployment rate was 14.5% in Q4 2022, compared with 15.4% in Q4 2021. The share of long-term unemployment in total registered unemployment was 57.49% in 2022, a large drop compared to 2021 (65.6% to 63.7% between Q1 and Q4 2021). The youth employment rate grew from 36.3% in Q1 2022 to 39.9% in Q4 2022, which is 5.3% higher than in Q4 2021. The share of women in total registered unemployment at the end of December 2022 was 57.64%, a reduction compared to 107 the same period in 2021, when this share amounted to 60.16%.

As regards labour inspection, an appropriate legislative framework involving sufficient resources and modernised planning of inspection activities and addressing issues such as gender that disproportionately impact on women, is not yet in place. A substantial turnover of staff is currently ongoing with the retirement of a significant number of experienced inspectors, increasing the need for training. No progress was made regarding legislative and non-legislative measures focused on work-life balance.

### 1.3 Role of partner institution in the sector

The Ministry of Labour and Social Welfare is responsible for the design of regulations in the field of labor relations, the labor market, social policy and pension and disability insurance. The Directorate for Safety and Health main goal is to improve safety and health at work in Montenegro. The improvement of safety and health at work is reflected in the application/using of safety and health measures, with the key goal of a safe and healthy workplace for all employees in Montenegro, as well as a strong vision, work without fatal, serious and collective injuries at work.

In view of the high number of injuries at work, the Ministry of Labor and Social Welfare, responsible for OSH policies, introduced in the national legislation in previous years the role of the Coordinator for Safety and Health at work in the project development phase and the Coordinator for Safety and Health at work in the construction phase. This reconciliation of national regulations with EU regulations is considered as a landmark with the identified goal of improving safety and health at work in the most sensitive field of the economy, being construction.

With regards to the role of the OSH coordinators, although their mandate has been defined there is a crucial need to strengthen their capacities in the fulfillment of the mandated tasks, while facing a number of challenges with the still unorganized state of construction sites and the high number of injuries at work in the construction industry.

## **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 support reinforcement of capacities of OSH coordinators to prevent accidents on construction sites

### **2.3 Expected results**

Expected Result 1: Training manual for OSH coordinators has been developed

Expected Result 2: MLSW staff has been empowered to conduct trainings/ToTs/ for OSH coordinators

### **2.4 Final deliverables**

D1 - A training needs assessment report identifying trainings needs of OSH coordinators [Activity 1]

D2 - A training plan for the ToT developed for MLSW staff to train the OSH coordinators [Activity 1]

D3 - A training of trainers (ToT) manual developed for MLSW staff to train the OSH coordinators [Activity 2]

D4 - A dissemination plan for the rolling out of trainings to the OSH coordinators [Activity 2]

D5 - A brief advisory note summarizing the main observations, findings and recommendations resulting from the coaching of the pool of trainers [Activity 3]

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

In view of the recent adoption by Montenegro of the Strategy for the Improvement of Occupational Safety and Health 2022-2027 (with its 22/23 Implementing Action Plan) with a view to align its national legislation with the EU acquis, and given the major challenges faced in the construction industry which appears to have the highest number of injuries at work, the Ministry of Labour and Social Welfare (MLSW) has requested support to SOCIEUX+ so as to enhance capacities of the occupational safety and health (OSH) coordinators to prevent accidents in construction sites. More specifically, the Action will aim at capacitating the staff within the OSH Directorate of the MLSW to conduct trainings targeting OSH coordinators (both coordinators in the design phase and coordinators in the construction phase, as currently envisaged in the OSH Strategy and given the lack of knowledge and experience in this area).

### **2.6 Planned activities (work plan of the action)**

The following activities are currently planned for the action:

- Activity 1 – To assess the trainings needs of OSH coordinators
- Activity 2 – To deliver a training of trainers (ToT) for MLSW staff to train the OSH coordinators
- Activity 3 – To coach the pool of trainers in the first piloting of the training modules for OSH coordinators

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

- **Activity 3** – To coach the pool of trainers in the first piloting of the training modules for OSH coordinators

## 2.7 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

*As a result of Activity 2: To deliver a training of trainers (ToT) for MLSW staff to train the OSH coordinators, a pool of trainers within the MLSW are trained to then teach the materials to OSH coordinators. The aim of the present activity – Activity 3: To coach trainers in the first piloting of the training modules for selected OSH coordinators – will consist of the experts **providing the necessary technical support and coaching in the practical and first delivery of the training modules to OSH coordinators (two types of coordinators)**. A combination of methods may be envisaged and will have to be defined in the methodological note, and may consist of master trainers (=public experts) jointly delivering part of the training modules and watching/listening to the pool of trainers delivering the training modules and making necessary improvement recommendations to the trainers. Depending on the methodology agreed with the partner institution, the experts may need to accompany the selected trainers nominated by the MLSW to field sites to deliver the training modules. This first piloting of training modules will need to target both types of OSH coordinators (coordinators in the design phase; and coordinators in the construction phase). The national OSH focal point/association may be involved – also dependant on the methodology proposed by the experts and discussed with the partner institution.*

The expert will have to develop as final deliverable a brief advisory note summarizing the main observations, findings and recommendations resulting from the coaching of the pool of trainers.

#### **Tasks:**

This activity will build on the findings of Activity 2 of the Action: “To deliver a training of trainers (ToT) for MLSW staff to train the OSH coordinators”.

The minimum tasks expected of **public experts** mobilised by SOCIEUX+ include:

#### Preparatory and documentation phase:

- Task 1: study and analysis of the context and relevant documentation, consisting of documentation provided by SOCIEUX+, that transmitted by the partner and the autonomous collection of the experts.
- Task 2: Preliminary contacts with the partner to define the methodology, the scope of the *coaching of trainers in the first piloting of the training modules for selected OSH coordinators*, as well as the agenda, to be transmitted at least one week before the mission to the SOCIEUX+ team.
- Task 3: Participate in briefing meetings with the SOCIEUX+ team before the activity;
- Task 4: Participate in a briefing with the Delegation of the European Union in Montenegro;
- Task 5: Agree on logistical arrangements for the implementation of the onsite activity.

Intervention phase (onsite):

- Task 1: Identify with the partner the main contact person(s) for the activity.
- Task 2: Facilitate a cooperative dynamic aimed at strengthening the individual and institutional capacities of any interested parties;
- Task 3: Finalisation and final adjustments to the pedagogical materials [as relevant], agenda, and evaluation data collection materials (feedback) – as required.
- Task 4: **Based on the previous Activity (Activity 2: To deliver a training of trainers (ToT) for MLSW staff to train the OSH coordinators), co-organise with the partner institution the training as first pilot/delivery of the training modules to the OSH coordinators by the pool of trainers within the MLSW. The training as first pilot/delivery of the training modules to the OSH coordinators will be delivered by the MLSW staff, who will be guided/coached by the experts, and may include a peer-to-peer approach and entail the sharing of experiences of selected senior and more experienced OSH coordinators whenever considered relevant.**
- Task 5: Invite workshop participants to fill in the [SOCIEUX+ online questionnaire \(PAF\)](#).
- Task 7: Experts will be available for a meeting at the request of the EU Delegation;
- Task 8: Channel to the SOCIEUX+ communication technician any material that could be useful to inform the public about the activity (photos, interviews, short notes or articles).

**Partner Institution:**

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

- ❖ providing one or more resource-persons to support the experts in the material and technical organisation, 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 OSH strategic documents and reports**), contacts and technical inputs with the experts
- ❖ **mobilizing/convening the selected pool of MLSW trainers and mobilizing a selected group of OSH coordinators;**
- ❖ the material organisation on site (including **logistics**).

*Note. Translation/interpretation costs will be foreseen for this Action. These will include interpretation costs of onsite meetings and training foreseen in the agenda (excluding preparatory meetings and debriefing meetings) – as well as translation costs of the final version of the final deliverables foreseen by the Work Plan.*

## **3.2 Deliverables**

### **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

- 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.
- **D5 - A brief advisory note summarizing the main observations, findings and recommendations resulting from the coaching of the pool of trainers**

## 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

#### **Principal expert (Expert 1) : Expert in Occupational Safety and Health**

**Area(s) of expertise:** Occupational Safety and Health / Working Conditions / Labour Administration & Inspection

**Specific skill(s) and competency(ies) of expertise:** Legislation & Regulation and enforcement / Quality assurance, inspection & audit / Individuals' capacity building/training

#### **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 **occupational safety and health and/or labour inspection**;
- 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 capacity-building and knowledge of training methods/tools / previous experience in **delivering trainings**;
- Acute sense of diplomacy and institutional relations.

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

- e) Experience in occupational safety and health in the area of **construction**;
- 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 Occupational Safety and Health**

**Area(s) of expertise:** Occupational Safety and Health / Working Conditions / Labour Administration & Inspection / Data collecting & Survey

**Specific skill(s) and competency(ies) of expertise:** Legislation & Regulation and enforcement / Quality assurance, inspection & audit / Individuals' capacity building/training

**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 **occupational safety and health and/or labour inspection**;

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 capacity-building and knowledge of training methods/tools / previous experience in **delivering trainings**;
- Acute sense of diplomacy and institutional relations.

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

- m) Experience in occupational safety and health in the area of **construction**;

- 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.

!!!!!!

**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.

**5.2 Estimated workload<sup>4</sup>**

**ACTIVITY 3 – To coach the pool of trainers in the first piloting of the training modules for OSH coordinators**

	Preparation	Onsite work	Distance work	Travel	Reporting & deliverables	Total
Principal expert (#1)	4	10			3	17
Expert (#2)	3	10			2	15
<b>Total experts</b>	<b>7</b>	<b>20</b>			<b>5</b>	<b>32</b>

**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 by<sup>5</sup>:
  - a. Providing contact details
  - b. Providing information on the competencies, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, experts are encouraged to complete in most detail de sections

<sup>4</sup> Please note that travel days are not considered as working days.

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

*on skills and competencies as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*

- c. Uploading of a curriculum vitae, preferably in Europass format<sup>6</sup>.
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab “Call for experts” and click on “Apply.”

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

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

## 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](http://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

---

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

- 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.

## TABLE OF CONTENTS

1	Background information .....	2
1.1	Country overview .....	2
1.2	Sector situation.....	2
1.3	Role of partner institution in the sector .....	3
2	Action Description .....	4
2.1	Overall objective .....	4
2.2	Specific objective (s) (purpose).....	4
2.3	Expected results.....	4
2.4	Final deliverables.....	4
3	Methodology.....	<b>Erreur ! Signet non défini.</b>
3.1	General methodology (of the action).....	4
3.2	Planned activities (work plan of the action).....	4
3.3	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 .....	7
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 .....	8
6	Required expertise.....	8
6.1	Expertise profile .....	8
6.2	Estimated workload .....	10
7	Applications .....	10
7.1	Call for experts .....	10
7.2	Selection of experts .....	11
7.3	Contracting of public experts .....	11
7.4	Financial compensations.....	12
7.5	Travel costs .....	12
8	Communication & Visibility .....	12
9	Code of conduct .....	12
10	Other considerations .....	<b>Erreur ! Signet non défini.</b>
11	Annexes .....	<b>Erreur ! Signet non défini.</b>

## 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](http://www.socieux.eu)



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



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



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



<http://goo.gl/qSByFu>

