

## TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

**Action code and partner country:** *SOCIEUX 2024-20 MONTENEGRO*

**Action title:** Modernisation of external communication of Pension and Disability Insurance Fund of Montenegro through the development of the Communication Strategy

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

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

- **Activity 1 – Assessment of structural needs for advanced external communication of the Fund**
- **Activity 2 – Co-drafting a Strategic Communication Plan based on the assessment**
- **Activity 3– Development of a proposal for job roles, resource allocation, and external communications organization**

**Tentative dates of implementation and location:**

**Activity 1 (on-site)** – Assessment of structural needs for advanced external communication of the Fund: tentative dates from March 10th to April 25th , 2025 (with an on-site mission from March 31th to April 04th , 2025)

- Preparation phase: from March 10th to 28th, 2025
- On-site mission in Podgorica: from March 31th to April 04th , 2025
- Reporting phase: from April 07th to 25th, 2025

**Activity 2 (on-site)** – Co-drafting a Strategic Communication Plan based on the assessment : tentative dates from May 12th to July 11th, 2025 (with an on-site mission from June 02nd to 13th, 2025)

- Preparation phase: from May 12th to 30th, 2025
- On-site mission in Podgorica: from June 02nd to 13th , 2025
- Reporting phase: from June 16th to July 11th, 2025

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

- Activity 1 : Expert #1 (*principal*) – *Communication and social security expert*
- Activity 2 : Expert #1 (*principal*) – *Communication and social security expert*

**Workload:**

Activity #1 - Expert #1 :Total\_13\_days (8\_days at distance; and 5\_days onsite)

Activity #2 - Expert #1 :Total\_17\_days (7\_days at distance; and 10\_days onsite)

**Call for experts' reference:** 24-20/MNE/1/1, 24-20/MNE/2/1

**Version - #:** \_1\_

Draft

Final

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## 1 BACKGROUND INFORMATION

### 1.1 Country overview

*Briefly describe:*

*The political and socio-economic situation, including HDI and other SDGs-related indicators, etc. (250 words)*

Montenegro is a country located in South-Eastern Europe, the capital is Podgorica. Montenegro has a surface of 13 883 square meters and a population of approximately 613,100 inhabitants. Montenegrin is the official language of the country, other languages such as Bosnian, Croatian, Serbian and Albanian are also used officially. Montenegro is a parliamentary republic and gained its independence from Serbia in 2006. Presidential elections took place in April, electing Jakov Milatovic at the head of the country. Montenegro has a GDP of 5.9 billion USD. Inflation has been significant but its effect on the cost of living was limited. High public debt and a deteriorating global environment require the country to pursue fiscal consolidation and reforms. The Gini coefficient in Montenegro (2022 data) was 31.5.

With the HDI value of 0.832, Montenegro ranks 49th out of 189 countries and territories. According to the latest HDR, life expectancy in Montenegro is 76.3, which is 2.3 years more than in 2003. Citizens of Montenegro have an average of 12.2 years of education, or 1.7 years more than in 2003. Amendments to the Law on pensions and Disability Insurance, as well as the Law on Protection of Employed Citizens of Montenegro Posted to Work Abroad were adopted in December 2021. According to the Law, current pensionable age is 66 for men and 61 and 9 months for women, this increase will now be capped at 66 for men, and 64 for women (which will be reached in 2028).<sup>1</sup>

Negotiation for the accession of Montenegro to the EU began in June 2012. To this date, 33 negotiating chapters are opened, of which three have been provisionally closed. Montenegro continued to implement the Stabilisation and Association Agreement (SAA).

The relevant chapter for the Action is 19, related to Social Policy and Employment.

### 1.2 Sector situation

*Briefly describe:*

*The specific institutional framework for the area of intervention (social protection or labour & employment), including key policies, systems and programmes, legal framework, key stakeholders, etc. (500 words)*

In addition to the rule of law and economic changes, public administration reform is one of the three pillars of the EU enlargement process. The European Commission places public administration reform at the heart of its enlargement policy, as reflected in the new enlargement methodology. This methodology introduces a cluster-based approach to negotiations, emphasizing the need for substantial reforms in various areas, including the rule of law, democratic institutions, public administration, and a stable economy. The objective is to ensure that candidate countries adopt key reforms that align with EU standards, strengthening the foundations of democratic governance and improving overall public sector performance.

Montenegro's 2022-2026 Public Administration Reform Strategy sets out the framework for institutional development. The core values driving this reform are diversity, equality, inclusion, anti-discrimination, and equal opportunities for all citizens. The strategy aims to transform Montenegro's public administration by 2026, ensuring that it is accountable, efficient, transparent, and inclusive. The goal is for the public sector to serve both the citizens and the economy effectively, fostering a climate of trust, professionalism, and good governance. These reforms are expected to contribute significantly to Montenegro's EU integration process and strengthen the overall functionality of public institutions.

In parallel with public administration reform, Montenegro is also undertaking significant changes to its social security system, particularly in the areas of pensions and employment. A important component of this reform is the national disability assessment system, which is being overhauled to establish a unified, more efficient, and equitable framework. The EU Delegation to Montenegro was

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

funding this initiative. The reform process should consolidate the current 30 disability determination commissions into a single institution, which will apply unified national criteria to assess disabilities across six key sectors: Social Protection, Employment, Pensions, Education, War Veterans, and Health.

Despite these efforts, persons with disabilities in Montenegro continue to face challenges in exercising their rights and accessing services. Although progress has been made with the re-establishment of the Directorate for Persons with Disabilities within the Ministry of Human and Minority Rights (MHMR), and the formation of the Council for the Rights of Persons with Disabilities in 2024, further action is needed. The draft law on a unified disability assessment body, which is essential to reforming the disability system, has yet to be adopted. This reform is intended to shift the focus from a medical model of disability to a human rights-based approach, ensuring greater fairness, transparency, and access to rights.

The EU Commission's 2024 report highlights several important reforms introduced by Montenegro's new coalition government. Among the most significant is the increase in the minimum pension by 52%, bringing it to EUR 450 in 2024. Additionally, the government launched the "Europe Now 2.0" work program and the Medium-Term Fiscal Strategy in September 2024, which includes several key reforms aimed at improving economic conditions. These reforms include raising the average minimum wage from EUR 450 to EUR 700 and halving pension contributions. While these measures are designed to improve living standards and support economic growth, they also pose considerable risks to the sustainability of Montenegro's public finances. The government has introduced compensatory measures and accelerated investment programs to mitigate these risks.

One of the most pressing challenges for the sustainability of the social protection system in Montenegro is its dependence on social contributions, coupled with demographic trends and a large grey economy. These factors pose significant risks to financing the system in the long term. The already high tax wedge limits the potential for increasing contribution rates, which makes it essential for future reforms to focus on increasing aggregate income. Structural reforms in education, pensions, and other key sectors will be crucial to ensure the long-term sustainability of the social protection system while enhancing its capacity to address the needs of the population.

### 1.3 Role of partner institution in the sector

*Briefly describe:*

- *The role of requesting institution in the institutional framework of the sector described above (200 words max.),*
- *The sectoral and institutional needs and gaps encountered the PI (400 words max.), and*
- *The existing initiatives (cooperation programmes) and international cooperation partners addressing the needs and gaps identified above (200 words max.).*

The Pension and Disability Insurance Fund of Montenegro (the Fund) is an organization responsible for administering pension and disability insurance rights and obligations. It operates as a legal entity, with powers defined by the Law on Pension and Disability Insurance and the Fund's Articles of Association. Its primary purpose is to ensure the rights of all insured persons. The Fund operates independently, but is accountable to the Government of Montenegro. It is managed by a Board of Directors, appointed by the government, with a director selected by the Board to oversee the Fund's operations.

The Fund's Professional Service, which includes the Central Service based in Podgorica and nine regional units, is responsible for ensuring the effective and efficient execution of its tasks. The Fund's main objective is to guarantee the legal and timely fulfilment of pension and disability insurance rights.

The 2022-2026 Public Administration Reform Strategy (PARS) for Montenegro outlines the development of the Fund, emphasizing values such as diversity, equality, inclusion, anti-discrimination, and equal opportunities for all. The goal of the reform is to improve public administration by 2026, making it accountable, professional, transparent, and inclusive. Transparency and openness within the public administration are key priorities of the reform.

Aligned with the PARS, SOCIEUX+ supported the Pension and Disability Insurance Fund of Montenegro in developing its 2024-2027 Strategic Plan (Action code 2023-20 MNE). Under Strategic Goal 4, the plan identifies the development and implementation of a Communication Strategy as a measure to raise awareness among stakeholders and effectively convey the Fund's key messages to the public.

The Fund faces several challenges, such as the lack of a clearly defined communication strategy, limited use of communication channels, and underdeveloped organizational structures for managing external communications. These issues have left the Fund behind other public institutions in Montenegro in terms of communication outreach and effectiveness. By improving its communication practices, the Fund will enhance engagement with stakeholders, build public trust, and contribute to Montenegro's broader goals of administrative modernization and EU integration.

## **2 ACTION DESCRIPTION**

*As per approved RCL:*

### **2.1 Overall objective**

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

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

To improve the public access to the Fund's work and enhance understanding of rights related to the pension and disability insurance system among all target groups.

### **2.3 Expected results**

R. 1: The Fund's structures for communication tasks has been organized to align with the objectives outlined in Public Administration Reform Strategy and the Strategic Plan of the Pension and Disability Insurance Fund of Montenegro

R. 2: Enhanced communication processes and services, in compliance with the developed Communication strategy.

### **2.4 Final deliverables**

D. 1: Report on needs assessment and structure of communication strategy

D. 2: Strategic Communication Plan for the Fund including the roadmap for its implementation and visibility templates

D. 3: Proposal document detailing the organization of communication-related jobs, resource allocation including job descriptions and interaction frameworks

## **3 METHODOLOGY**

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

*Describe the summary approach proposed to achieve the expected results and deliverables (400 words)*

The action aims to address the mentioned challenges by developing a Communication Strategy for the Fund, which will guide improvements in how the Fund interacts with the public. By focusing on better communication, the action seeks to make information more accessible to the public and raise awareness of the pension and disability insurance system among all target groups.

The first activity will introduce an assessment of the current communication practices within the Fund. This includes evaluating its organizational structure, the adequacy of human resources, and the effectiveness of existing communication tools. Experts will work to identify weaknesses, inefficiencies, and gaps in the current system. The assessment will also include gathering input from various stakeholders, such as employees, beneficiaries, and rights holders, to understand their communication needs and expectations. Activity 1 will also outline the general components of the

Communication strategy, addressing the gaps and shortcomings identified in the assessment and incorporating the perspectives of the stakeholders.

Building on the findings from this assessment, in Activity 2, experts and the PI will co-draft a Strategic Communication Plan. This plan will serve as the blueprint for improving the Fund's communication processes. It will provide guidance on how to enhance transparency, raise public awareness, and ensure that the Fund's services are better tailored to the needs of citizens. This plan will also include a roadmap for implementation, detailing the steps to be taken, and visibility templates that will ensure the Fund's messages are consistent and easily understood.

Activity 3 will focus on the development of a proposal for job roles, resource allocation, and external communications organization within the Fund. This proposal will address the need for a well-structured framework to manage communication-related tasks.

The action will result in the organization of the Fund's communication structures to align with the objectives of the Public Administration Reform Strategy and the Strategic Plan of the Pension and Disability Insurance Fund of Montenegro. Enhanced communication processes and services will be implemented in compliance with the developed Communication Strategy, ensuring greater transparency and accessibility. These improvements will strengthen public understanding of the pension and disability insurance system and support better service delivery.

To achieve these results, three final deliverables are expected. First, a needs assessment report will be produced, identifying the current communication structure and any deficiencies. This will include an analysis of the available communication tools and resources, as well as a review of human resources involved in communication tasks. Second, a Strategic Communication Plan will be developed for the Fund, which will include a roadmap for its implementation and templates for visibility. This plan will define how the Fund will improve communication with the public, enhance transparency, and ensure better service delivery. Third, a proposal document will be drafted, detailing the organization of communication-related jobs, resource allocation, and job descriptions. This will ensure a well-structured framework for communication within the Fund.

The action will contribute to better public access to the Fund's work and will enhance understanding of the pension and disability insurance system. The Communication Strategy will help modernize the Fund's communication approach, ensuring that its services are more accessible, transparent, and effective for all stakeholders involved.

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

The following activities are currently planned for the action:

- Activity 1 – Assessment of structural needs for advanced external communication of the Fund
- Activity 2 – Co-drafting a Strategic Communication Plan based on the assessment
- Activity 3 – Development of a proposal for job roles, resource allocation, and external communications organization

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

- Activity #1 & #2.

### **3.3 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 *[remove individual bullets if necessary]*:

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

## 4 ACTIVITIES DESCRIPTION

### 4.1 Tasks

The principal expert will lead the on-site mission. He/she/they will be responsible for producing all activity deliverables (see below Section **Erreur ! Source du renvoi introuvable.**). He/she/they will be responsible for preparing, coordinating, implementing and reporting the overall activity towards SOCIEUX+.

The experts shall co-develop a proposal for peer-to-peer methodology and agenda together with the Partner institution, to be discussed and validated ahead of the mission. Without prejudice to the choice of tools by experts, methodological approaches may include peer-to-peer consultations, presentation of EU good practices, preliminary survey, in depth interviews, focus group/workshop with the stakeholders, collecting and processing qualitative and quantitative data etc. Broader network of stakeholders can be involved in the activities.

Activity 1 will focus on assessing the current communication processes and structure within the Fund, identifying strengths, weaknesses, and areas for improvement. Experts will review the organizational setup, examine the adequacy of human resources, and assess the effectiveness of current communication tools. This will help identify inefficiencies and gaps in the system.

The experts will also conduct a stakeholder needs analysis by consulting with Fund employees, beneficiaries, and rights holders to understand their communication needs and expectations. They will explore the possibility of setting up a call centre and integrating it with existing systems, alongside recommendations for a "one-stop-shop" approach to simplify interactions.

For the first activity in Podgorica, a series of meetings will be organized with the Fund to jointly identify actual inconsistencies and areas of future possible improvements, with the elaboration of a rationale for the future necessary changes, in particular regarding human resources, processes and external communication practices. External stakeholders—including beneficiaries, right holders, and key partners opinions will be consulted to gather input on communication needs, expectations, and challenges.

Activity 2 will take place on-site in Podgorica, where experts will work on drafting a strategic communication plan based on the findings from Activity 1. This plan will be aligned with institutional and national guidelines and will include an indicative roadmap for its application. The strategic communication plan will define objectives for engaging stakeholders, including right holders, beneficiaries, and employers, while enhancing services and feedback mechanisms. It will outline key messages tailored for diverse stakeholder groups, identify communication channels, and provide a detailed action plan with timelines. Success metrics and monitoring mechanisms will ensure continuous evaluation, alongside strategies for stakeholder engagement and organizational arrangements. It will also address data protection, accessibility, and outline priorities for the next three to five years.

Proposed and non-exhaustive list of strategy content:

- Communication strategy objectives
- Communication modalities with right holders and beneficiaries, employers, other stakeholders.
- Advancement of services and feedback mechanisms
- Data protection and accessibility
- Priorities for the next three to five years
- Financial forecast and projection
- Measurement of success and related key results
- Identification of potential risks and strategies for mitigation
- Allocation of resources



- Feedback mechanisms - systems for gathering stakeholder input and continuously improving the processes and services
- Processes mapping with key performance indicators
- A roadmap as a tool for the implementation of the strategic plan

A working group of SOCIEUX+ experts and a selected team from the Partner Institution shall be composed. It is for the Partner Institution to deliberate and find the members of such a working group. A series of on-site and in case needed, on-line workshops shall be organised to enable the co-drafting process together with the resource persons from the partner institution.

The plan will further incorporate activities, success measurement, and processes mapping with key performance indicators. The roadmap will serve as a tool for the implementation of the strategy. Given the time constraints of the mission, experts and partners will agree on a shared methodology and co-drafting process. A working group composed of representatives from the Partner Institution will be established to collaborate on the plan, with workshops organized to facilitate co-drafting between SOCIEUX+ experts and the partner institution.

The draft strategic communication plan will be presented to the relevant authorities for endorsement. The final document will include the roadmap for implementation and templates for visibility actions.

Minimum tasks expected from the experts shall include *[the below list includes indispensable tasks and is non-exhaustive; eventual additional tasks specific to the activity shall be included]*:

**Task 1 – Preparation of the mission.** The Experts Team:

- gets substantial knowledge of the local context; reviews any relevant background document provided by the SOCIEUX+ Team and/or the Partner institution (PI);
- establishes in close consultation with the PI the mission's methodology and agenda (MeN);
- submits the MeN for approval by the SOCIEUX+ Team;
- takes part in the pre-departure briefing with the SOCIEUX+ Team (around 1 week before the mission);

**Task 2 – Implementation of the mission.** The Experts Team:

- reviews and finalises the agenda of the mission and the list of stakeholders to be consulted with the PI upon arrival; any changes to the MeN shall be timely communicated to the SOCIEUX+ Team;
- organises, as necessary, a brief presentation of the objectives and methodology of the mission for the PI and relevant stakeholders;
- provides 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;
- compiles the initial findings and main conclusions emerging from the peer-to-peer technical exchange in a brief presentation that will be used for the final consultation and debriefing on-site;
- channels to SOCIEUX+ Communication officer any material that can be useful to inform the public about the activity (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.** The Experts Team:

- presents the initial findings and main recommendations emerging from the peer-to-peer technical exchange to the PI, relevant stakeholders and the EU Delegation; and,
- collects the feedback of the PI, relevant stakeholders and the EU Delegation for inclusion, as possible, in their final draft of the activity's final deliverables.

**Task 4 – Finalisation and submission of the deliverables.** The FFM Team:



- elaborates the final deliverables for review and commenting by SOCIEUX+, the PI and eventually other stakeholders.

## 4.2 Deliverables

### 4.2.1 Pre-mission deliverables

- MeN: A methodological note, detailing the working approach, tools and methods to be employed, a risks analysis, etc.; and an activity/mission agenda, detailing the meetings and working sessions to be held, persons to meet, etc. The Methodological Note shall not exceed 5 pages (excluding the cover page and annexes)

### 4.2.2 Final deliverables

#### **For Activity 1**

- D1: 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: An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- D3: A collective Activity Report (AcR) in SOCIEUX+ format (template provided). The mission team will produce this AcR jointly. It is intended for the Partner Institution but will probably be shared with key stakeholders of the action. The report will reflect the tasks conducted during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- D4: A technical report representing the experts' contribution to the PI in relation to the content of the peer-to-peer exchanges to attain the action's expected results and contribute to achieving its specific objectives. It is a piece of technical work on the subject of peer-to-peer cooperation. The technical report shall comply with the description provided in ToREx and further agreed upon in the MeN:
  - Report on needs assessment and structure of communication strategy - This deliverable will provide an analysis of the communication needs of the stakeholders, identifying challenges and areas for improvement. It will also outline the framework for a communication strategy, detailing the objectives, target audience, key messages, and channels to be used for effective outreach and engagement. At the end of Activity 1, experts and PI representatives will agree on the specific components of the strategic document and the areas of improvement that will be addressed and elaborated in the following activity.

#### **For Activity 2**

- D1: 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: An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- D3: A collective Activity Report (AcR) in SOCIEUX+ format (template provided). The mission team will produce this AcR jointly. It is intended for the Partner Institution but will probably be shared with key stakeholders of the action. The report will reflect the tasks conducted during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- D4: A technical report representing the experts' contribution to the PI in relation to the content of the peer-to-peer exchanges to attain the action's expected results and contribute to achieving its specific objectives. It is a piece of technical work on the subject of peer-to-peer cooperation. The technical report shall comply with the description provided in ToREx and further agreed upon in the MeN:

- Communication Strategy for the Fund including the roadmap for its implementation and visibility templates .

## 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 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 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, or in the language of the Partner Institution.

### 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 first agreed with the Partner Institution, then submitted to the SOCIEUX+ Team no later than 5 working days before the departure on mission of the Experts Team.
- Pre-mission deliverables will be shared and reviewed by SOCIEUX+. Feedback on the deliverables should be provided to the FFM Team at the latest 2 days before the departure on the mission of the experts. Comments and recommendations of this feedback shall be taken into account for the implementation of the activity/mission by the experts. An updated version of the MeN, integrating the SOCIEUX+ Team's feedbacks and recommendations shall be re-submitted by the Experts Team at the earliest possible occurrence.

#### 5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted by the Experts Team to the SOCIEUX+ Team no later than 10 working days upon completion of the Experts Team's mission.
- Feedback by the SOCIEUX+ Team on the first draft version of the report should be provided 5 working days after its submission.
- Inclusion of the feedback by the Experts Team in the draft versions is expected 5 working days upon reception of the comments.

- The second draft version of the deliverables shall be submitted by the SOCIEUX+ Team to the PI for review and approval. The PI should approve or formulate comments and/or requests of amendments no later than 5 working days after having received them.
- In case of comments and/or requests of amendments, the Experts Team will have 5 additional working days to achieve a final version of the deliverables. Generally, no more than one round of feedback and revision is accepted.
- Final payments and reimbursement of travel costs to experts can only be authorised upon approval of the final version of the deliverables by the PI and SOCIEUX+.

## 6 REQUIRED EXPERTISE

### 6.1 Expertise profile

#### **Activity 1**

#### **Principal expert (Expert #1): Communication and social security expert**

**Area(s) of expertise :** Social security; Pension Schemes, Disability Benefits\_

**Specific skill(s) & competency(ies):** Organisational management; Communication & social marketing; Governance, transparency & accountability; P&S making and development;

#### **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): **10**
- c) Required language knowledge: English fluency, written and oral
- N.B.: Translation and interpretation services may be commissioned by SOCIEUX+.*
- d) Other essential qualification(s):

- Demonstrated knowledge of functioning of pension and disability insurance funds
- Relevant experience and knowledge of communication tools and channels, as well as institutional media and communication
- Relevant experience in the design of strategies/plans and processes for pension and disability funds in the EU, in particular in relation to outreach and service provision insured and beneficiaries

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

- e) A previous experience in delivering short-term technical assistance in international cooperation;
- f) A previous professional experience in Western Balkans
- g) Language(s): command of Montenegrin, Serbian, Bosnian, Croatian

## 6.2 Estimated workload

	Preparation	On-site work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	3	5	1	4	13
<b>Total experts</b>	<b>3</b>	<b>5</b>	<b>1</b>	<b>4</b>	<b>13</b>

### **Activity 2**

#### **Principal expert (Expert #1): Communication and social security expert**

**Area(s) of expertise:** Social security; Pension Schemes, Disability Benefits\_

**Specific skill(s) and competency(ies) of expertise:** Communication & social marketing, Governance, transparency & accountability; Service delivery;

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

e) 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.

f) The number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s): **10**

g) Required language knowledge: English fluency, written and oral

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

h) Other essential qualification(s):

- Demonstrated knowledge of functioning of pension and disability insurance funds
- Experience providing advice to public institutions in adapting and optimizing their processes and structures, specifically in advancing strategic communication tools
- Relevant experience in the design of strategies/plans and processes for pension and disability funds in the EU, in particular in relation to outreach and service provision insured and beneficiaries

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

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

f) A previous professional experience in Western Balkans

g) Language(s): command of Montenegrin, Serbian, Bosnian, Croatian

### 6.3 Estimated workload

	Preparation	On-site work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	3	10	0	4	17
<b>Total experts</b>	<b>3</b>	<b>10</b>	<b>0</b>	<b>4</b>	<b>17</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 need to create their SOCIEUX+ account by clicking on "Create an account" using a valid 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 the 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 the SOCIEUX+ Team approves their profile, they can apply to any available calls for experts accessible under the tab "Call for experts" and click on "Apply."

Applications are reviewed on a rolling basis, and positions may be filled as soon as suitable candidates are identified.

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. The mobilisation of experts currently employed with specialised international agencies is limited to activities and/or actions that are jointly implemented with that expert's agency of origin, indicated as 'Supporting Entity' in the Request.

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)

At SOCIEUX+ we value all experts as unique individuals, and we welcome the variety of experiences they bring to the Facility. As such, we have a strict non-discrimination policy. We

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<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>

believe everyone should be treated equally regardless of race, sex, gender identification, sexual orientation, national origin, native language, religion, age, disability, marital status, citizenship, genetic information, pregnancy, or any other characteristic protected by law. If you feel that you have been discriminated against, please let the SOCIEUX+ team know as soon as possible. Every complaint will be appropriately investigated.

### 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:

- **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 (+ Authorisation 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 authorised 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 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.

### 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 contributions for communication and visibility, such as photographs, short texts, and interviews.



Before and after the mission, short briefings can be organised 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+ nor 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 fully complies with and respects the local institutions, policies and cultural behaviours. They shall particularly adopt culturally sensitive behaviour when dealing with their local counterparts.

## **10 OTHER CONSIDERATIONS**

[.....]

## **11 ANNEXES**

[...Text...]

## TABLE OF CONTENTS

1	Background information .....	3
1.1	Country overview.....	3
1.2	Sector situation .....	3
1.3	Role of partner institution in the sector.....	3
2	Action Description .....	5
2.1	Overall objective.....	5
2.2	Specific objective (s) (purpose) .....	5
2.3	Expected results .....	5
2.4	Final deliverables .....	5
3	Methodology .....	5
3.1	General methodology (of the action) .....	5
3.2	Planned activities (work plan of the action) .....	6
3.3	Inclusion of cross-cutting issues .....	6
4	Activities description .....	7
4.1	Tasks .....	7
4.2	Deliverables .....	9
4.2.1	Pre-mission deliverables.....	9
4.2.2	Final deliverables.....	<b>Erreur ! Signet non défini.</b>
5	Reporting and submission of deliverables .....	10
5.1	Formats.....	10
5.2	Submission and approval .....	10
5.2.1	Pre-mission deliverables.....	10
5.2.2	Final deliverables.....	10
6	Required expertise.....	11
6.1	Expertise profile.....	11
6.2	Estimated workload.....	12
7	Applications .....	14
7.1	Call for experts .....	14
7.2	Selection of experts .....	14
7.3	Contracting of public experts .....	15
7.4	Financial compensations .....	15
7.5	Travel costs .....	15
8	Communication & Visibility .....	15
9	Code of conduct .....	16
10	Other considerations .....	16
11	Annexes .....	17
	About SOCIEUX+ .....	1

## 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), the French Ministry for Europe and Foreign Affairs, France Travail, the Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, the Federal Public Service for Social Security of Belgium / Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development Agency (Enabel).

The Facility's general objective is to increase employment opportunities and inclusive social protection systems in Partner Countries. Its specific objective is to improve policy and institutional frameworks for the development of labour, employment and social protection in Partner Countries, based on an inclusive and sustainable approach.

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.

More information: [www.socieux.eu](http://www.socieux.eu)