

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2025-04 Montenegro*

Action title: *Strengthening the Confederation of Trade Unions of Montenegro (CTUM) for Effective Social Dialogue on Labour Legislation*

Partner institution: *Confederation of Trade Unions of Montenegro*

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

- *Activity #1 – Enhancing the Capacity of CTUM Task Force Members in Social Dialogue and Legislative Negotiations*
- *Activity #2 – Training of Trainers (ToT) for CTUM Task Force Members on Advocacy and Negotiation*

Tentative dates of implementation and location:

- *Activity 1 (on-site) – **Enhancing the Capacity of CTUM Task Force Members in Social Dialogue and Legislative Negotiations:** tentative dates from May 26th to July 18th , 2025 (with an on-site mission from June 16th to 20th , 2025)*
 - ***Preparation phase:** from May 26th to June 13th , 2025*
 - ***On-site mission in Podgorica:** from June 16th to 20th , 2025*
 - ***Reporting phase:** from June 23rd to July 18th , 2025*
- *Activity 2 (on-site) – **Training of Trainers (ToT) for CTUM Task Force Members on Advocacy and Negotiation:** tentative dates from August 25th to November 07th , 2025 (with an on-site mission from September 29th to October 03rd , 2025)*
 - ***Preparation phase:** from August 25th to September 26th , 2025*
 - ***On-site mission in Podgorica:** from September 29th to October 03rd , 2025*
 - ***Reporting phase:** from October 06th to November 07th , 2025*

Expert positions and responsibilities (by activity):

- *Activity # 1&2 : Expert # 1 (principal) – Social Dialogue and Trade Unions*
- *Activity # 1: Expert # 2 – Labour Legislation and Labour relations*
- *Activity #2 : Expert #2 – Trainer on Labour Legislation and Labour relations*

Workload:

Activity # 1&2 - Expert #1: Total 28 days (18 days at distance; and 10 days onsite)

Activity # 1- Expert #2: Total 11 days (6 days at distance; and 5 days onsite)

Activity #2 - Expert #2 : Total 12 days (7 days at distance; and 5 days onsite)

Call for experts' reference: 25-04/MNE/1-2/1, 25-04/MNE/1/2, 25-04/MNE/2/2

Version - #: __

Draft

Final

Date: *April 08, 2025*

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1 BACKGROUND INFORMATION

1.1 Country overview

Montenegro is a country located in South-Eastern Europe, the capital is Podgorica. It 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 2024, electing Jakov Milatovic at the head of the country. Montenegro has a GDP of 5.9 billion USD. 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. The per capita income is the highest among the six Western Balkan economies, but the convergence with the EU needs to be accelerated. While per capita income was only 41 % of the average EU income in 2010, it increased to 50 % in 2019, before dropping to 45 % in 2020 due to the Covid-19 pandemic and partially recovering to 48 % in 2021 (Eurostat, 2023). In 2021, almost 40 % of full-time equivalent jobs paid wages below the new minimum wage set by the “Europe Now” reform. The new statutory minimum wage lifted roughly 35 % of jobs to the new minimum wage. The Montenegrin labour market is still facing a range of structural challenges. While the employment rate has returned to pre-pandemic levels, standing at nearly 56 % in 2023 (Monstat, 2024), it continues to lag well behind the EU average of 75 % during the same time (Eurostat, 2023). The country was also confronted with an unemployment rate of more than 13 % in 2023 (Monstat, 2024) that severely affects the youth.¹ Montenegro's shift from an industrial to a service economy led to the collapse or downsizing of large enterprises while fostering the rise of numerous small businesses. Montenegro's economy has shifted, with 70% of the workforce in services and 99% of enterprises being micro, small, or medium-sized, contributing 60% to GDP. However, necessary reforms toward a sustainable growth model remain unfulfilled. Crises have exposed systemic weaknesses, highlighting the urgent need for a radical shift in economic, social, tax, and environmental policies.

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

The Social Council, a constitutionally mandated body, serves as the platform for tripartite dialogue between the government, trade unions, and employers. Despite persistent challenges, this mechanism has facilitated several agreements, including the 2022 General Collective Agreement, which introduced significant provisions on wages and working hours.

According to the European Commission's 2024 report on Montenegro, the tripartite Social Council met three times during the year, but its working group on occupational health and safety remains non-functional. The influence of social partners in policy-making processes remains weak, limiting their ability to contribute effectively to labour-related reforms. Additionally, inconsistencies between the Law on Strikes and the Labour Law regarding minimum work processes pose challenges for industrial relations. Montenegro remains committed to strengthening social dialogue institutions and aligning its labour policies with EU standards. The recent establishment of the Directorate for Social Dialogue within the Ministry of Labour, Employment, and Social Dialogue is a positive step; however, further efforts are needed to strengthen social dialogue and enhance the capacity of social partners to engage effectively in decision-making processes.

The newly established Directorate has initiated work on key legislative reforms aimed at strengthening collective bargaining and social dialogue. One of its priorities is the amendment of the Law on Strikes, which involves analyzing the existing legal framework and its impact on collective bargaining practices. Through consultations with trade unions and employer associations, the Directorate will propose amendments to align the law with international and EU standards. Public discussions and the drafting of the revised law are scheduled for the first half of 2025.

¹ <https://www.ilo.org/resource/other/about-ilo-montenegro>

Additionally, the Directorate is developing a new Law on the Representativeness of Trade Unions and Employer Associations. The objective is to establish clearer criteria for representativeness to enhance the effectiveness of collective bargaining. This process includes consultations with social partners, with the draft law expected to enter the legislative procedure in the third quarter of 2025.

The Decent Work Country Programme (DWCP), developed in collaboration with the Government, Employers' Union, and trade unions, outlines key ILO priorities for 2024-2027. These priorities focus on fostering inclusive and productive employment while enhancing working conditions to support sustainable economic and social development.

Montenegro's economic and social transformations have profoundly reshaped its labour landscape. The transition from an industrial to a service-based economy resulted in the decline of large enterprises and the proliferation of small businesses. Historically, trade unions primarily represented industrial workers; however, with the dissolution of large enterprises, organizing employees in smaller businesses has proven challenging. As a result, the public sector has become the predominant base for trade union activity, particularly following Montenegro's independence and the subsequent expansion of public institutions.

The public sector encompasses a diverse range of professions, including firefighters, doctors, judges, and nurses. A current issue within this sector is the drafting of the Law on Wages of Public Sector Employees, which extends beyond government employees to include workers in enterprises established by local governments. Given the wide array of professions covered, the legislation requires a balanced approach to ensure equitable and effective wage policies.

1.3 Role of partner institution in the sector

The Confederation of Trade Unions of Montenegro (CTUM) is autonomous, democratic, and voluntary organization, and unites trade unions across various sectors based principles of social justice, democracy, and the application of international labor standards. CTUM is instrumental in fostering social dialogue at both national and sectoral levels, negotiating collective agreements, and participating in policy discussions related to labor, social, and economic issues. The Confederation works to protect workers' rights, improve occupational health and safety, and address abuse and discrimination in the workplace. CTUM also facilitates the training and development of trade union members and employees, while fostering international trade union cooperation. Despite its significant role in advocating for workers, the CTUM faces challenges in enhancing its capacity to represent all sectors, especially given the growing public sector workforce and the complexity of labor laws.

CTUM comprises 23 affiliated Branch Trade Unions. CTUM also operates through municipal trade union agencies, which serve as internal organizational units within each municipality, representing and coordinating the activities of trade unions and their members in local areas. Additionally, CTUM has established interest groups, such as the Gender Equality Committee and the Youth Committee, to advocate for specific categories of workers, address their unique challenges, and ensure that their concerns are integrated into the broader trade union agenda. The Secretariat, staffed by full-time employees, provides administrative support to the Confederation and its organizational units, ensuring that members receive the necessary assistance despite the lack of independent secretariats at the branch and municipal levels.

CTUM covers approximately 70,000 employees in the public sector. A key challenge of Confederation is the lack of sufficient capacity to engage in legislative processes, such as the drafting of the Law on Wages of Public Sector Employees. The law's complexity, which covers diverse public sector professions, risks creating divisions within union membership, as trade unions from different branches have varying interests and concerns. Additionally, CTUM struggles to protect its members' rights due to insufficient resources and expertise, especially in navigating the legislative changes accelerated by Montenegro's EU accession process. The Confederation has identified a gap in evidence-based policy formulation and negotiations, with a need for structured capacity-building programs to strengthen its advocacy, negotiation, and policy analysis skills.

The Confederation's ability to influence labor law reforms is hindered by a lack of a systematic framework for research and legal assessments. The existing capacity of CTUM to engage in tripartite social dialogue and to contribute to labor law reforms needs significant strengthening to ensure that the Confederation's positions are well-informed, aligned with national priorities, and consistent with EU labor standards.

CTUM has limited experience in international assistance. In 2022, confederation participated in the project "Trade Unions For A Fair Recovery - Strengthening the Role of Trade Unions in Mitigating the Impact of the COVID-19 Crisis," funded by the EU. CTUM was an indirect beneficiary of this initiative

implemented through the European Trade Union Confederation (ETUC). This project aimed to strengthen the capacity of trade unions in responding to the challenges posed by the COVID-19 crisis. The project, which concluded in March 2024, focused on enhancing the role of trade unions in supporting workers during the pandemic and contributing to a fair recovery process.

2 ACTION DESCRIPTION

2.1 Overall objective

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

2.2 Specific objective (s) (purpose)

The Confederation of Trade Unions has a greater impact on labour legislation development and reform in Montenegro.

2.3 Expected results

R1: Strengthened research and analytical functions of the CTUM Secretariat, improving its ability to engage in informed and impactful social dialogue.

R2: Reinforced competencies of CTUM task force members in policy formulation, negotiation, and evidence-based advocacy.

2.4 Final deliverables

- D. 1: Advisory Note on Social Dialogue and Legislative Negotiations
- D. 2: Training Toolkit and Dissemination Plan on Advocacy and Negotiation
- D. 3: Proposal for a Research and Advocacy Unit
- D. 4: Methodology for Research and Policy Analysis

3 METHODOLOGY

3.1 General methodology (of the action)

The proposed action will strengthen the CTUM's capacity to engage in social dialogue and legislative processes by equipping its Task Force members with skills in advocacy, negotiation, and policy formulation. *Within the scope of this ToR, one principal expert and two second experts will be selected to participate in two missions taking place in Podgorica.*

On the first mission, experts will assess current challenges in tripartite consultations and legislative negotiations, particularly regarding the Law on Wages and other labor-related legislation. The mission agenda will include structured discussions, functional analysis of CTUM's role, and workshops aimed at identifying areas for improvement and developing strategies for effective engagement in social dialogue. CTUM members will gain insights into effective strategies for engaging in tripartite consultations and current legislative processes. This will result in the drafting of an Advisory Note on Social Dialogue and Legislative Negotiations, providing practical guidance on negotiation strategies and policy formulation. This document will serve as a reference tool for Task Force members, helping them present evidence-based positions and advocate for policies that align with trade union positions, national priorities and EU labor standards.

The second activity will be the Training of Trainers (ToT) program for CTUM Task Force members. The ToT program will be delivered in a hybrid format to ensure maximum accessibility and dissemination, combining in-person sessions with online components. This training will focus on enhancing participants' abilities in negotiation, advocacy, and policy development, particularly in relation to ongoing legislative processes such as the Law on Wages of Public Sector Employees. The SOCIEUX+ e-learning platform will enable CTUM trainers to share knowledge within their member trade unions, strengthening the overall capacity of the Confederation to contribute effectively to social dialogue and labor law reforms.

The third activity aims to develop a structured framework for research, advocacy, and social dialogue within CTUM. During the mission, experts will collaborate with CTUM representatives to create a methodology for research, legal assessments, and policy analysis, translating it into standardized tools and data collection guidelines to strengthen CTUM's role in labour policy development. Additionally, experts will propose the establishment of a Research and Advocacy Unit, outlining its operational framework and governance.

The action will result in the strengthening of the research and analytical functions within the CTUM Secretariat, improving its capacity to engage in informed and impactful social dialogue. It will also enhance the competencies of CTUM Task Force members in policy formulation, negotiation, and evidence-based advocacy, enabling them to effectively contribute to legislative processes and social dialogue, ensuring that CTUM's positions are well-informed and aligned with national and EU standards.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

Activity 1 – Enhancing the Capacity of CTUM Task Force Members in Social Dialogue and Legislative Negotiations

Activity 2 – Training of Trainers (ToT) for CTUM Task Force Members on Advocacy and Negotiation

Activity 3 – Developing a Structured Framework for Research, Advocacy, and Social Dialogue within CTUM

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

- Activity #1 and #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:

- Gender equality;
- Good governance;
- Human rights (including rights of children, 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.

First activity will be implemented through an expert mission in Podgorica, aimed at strengthening the capacity of CTUM Task Force members in social dialogue and legislative negotiations. The expert

will engage with Task Force members and other relevant CTUM staff to analyze current challenges in tripartite consultations and legislative processes, with a particular focus on ongoing negotiations related to the Law on Wages and other labour related legislation. The mission will include structured discussions and functional analysis of CTUM's role in social dialogue, identifying areas for improvement and reinforcing the capacity of Task Force members to further develop policy positions and negotiation strategies. Experts will present experiences and relevant practices from the EU countries.

During the activity, a series of meetings and workshops will be organized with the CTUM to jointly identify actual challenges and areas of possible improvements, with the elaboration of a rationale for the necessary future changes.

The experts will prepare a technical output - Advisory Note on Social Dialogue and Legislative Negotiations (D1). This document will provide practical guidance on structuring arguments, developing negotiation strategies, and engaging effectively in legislative discussions. The Advisory Note will serve as a reference tool for Task Force members, supporting them to contribute to ongoing and future policy debates with well-founded and evidence-based positions.

Indicative summary of the Advisory Note (non exhaustive list):

1. Overview and Rationale

Experts will present the background and purpose of the Advisory Note, positioning it within the broader efforts to strengthen social dialogue in Montenegro. It will reflect on the role of the CTUM Task Force in legislative processes and outline the expected contribution of the Note to their ongoing work, especially in relation to the current reform agenda (e.g. Law on Wages).

2. Institutional and Policy Context

A brief analysis of the current state of tripartite dialogue and labour legislation reform in Montenegro. The section will map key institutional actors, processes, and dynamics relevant to social dialogue, identifying specific challenges CTUM faces in asserting its role and influencing legislative developments.

3. Challenges and Needs Identified

Based on exchanges with CTUM Task Force members and other relevant stakeholders, experts will summarise key issues affecting CTUM's effective participation in social dialogue. This includes internal capacity constraints, strategic positioning, and gaps in procedural engagement and negotiation preparedness.

4. Comparative Best Practices from EU Member States

Drawing on selected experiences from EU countries, experts will provide examples of effective trade union engagement in legislative dialogue and policy formulation. These cases will be used to illustrate alternative approaches and practical methods that may be relevant and adaptable to the Montenegrin context.

5. Strategic and Operational Guidance

Experts will offer practical guidance to CTUM Task Force members in the following areas:

- Structuring and communicating policy positions
- Engaging in evidence-based and interest-driven negotiations
- Strengthening participation in formal and informal consultation mechanisms
- Building alliances and improving coordination within the tripartite framework

6. Recommendations for Institutional Strengthening

Experts will propose a set of tailored recommendations to reinforce CTUM's strategic and operational role in social dialogue. It will include suggested improvements in internal processes, capacity-building priorities, and external engagement practices to ensure a more consistent and effective presence in legislative negotiations.

7. Tools and Resources

As an annex, the Advisory Note will include practical tools such as checklists, templates, and frameworks for preparing negotiation strategies, drafting policy briefs, and managing stakeholder dialogues—intended for everyday use by CTUM staff and Task Force members.

Second activity mission will be delivered in Podgorica, in the CTUM offices, or alternatively another location. Experts will choose their methodology for preparing and delivering the training. Experts will have at their disposal the SOCIEUX+ e-learning platform, which will be used as a complement to the on-site training. It will not be the experts' responsibility to upload content, however, they will be asked to provide content (online resources, reports, videos etc.)

The experts will design and deliver a Training of Trainers (ToT) program to strengthen CTUM Task Force members' including union representatives' capacity in negotiation techniques, policy development, and strategic communication. The training will combine theoretical instruction with practical exercises, case studies, and simulated negotiations to enhance participants' ability to engage in effective advocacy. The program will be structured with defined learning objectives, tailored content, and assessment methods to ensure its relevance and impact. The training program will incorporate EU best practices in advocacy and negotiation, providing participants with insights into effective strategies used by trade unions across Europe.

The training might be conducted in a hybrid format, combining in-person sessions with online components to maximize accessibility and engagement. Experts will be supported by SOCIEUX+ in utilizing SOCIEUX+ learning platform for both the preparation and implementation of the ToT program, ensuring structured content delivery and interactive learning.

Experts will work with CTUM focal point to develop a Training Toolkit and Dissemination Plan, providing compendium of materials and a framework for knowledge transfer. This will support CTUM in implementing the training in a structured and phased manner, ensuring continuity and long-term capacity building within the organization.

Tasks:

Minimum tasks expected from the **experts** shall include:

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 or TMT in case of training activity);
- submits the MeN/TMT for approval by the SOCIEUX+ Team;
- Preparing content for the e-learning and working with SOCIEUX+ team to integrate it in Moodle platform (in case of training activity)
- 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/TMT 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 Experts Team:

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

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. Minimum tasks expected from the **Partner Institution** shall include:

- 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 organization of the activity, including sharing relevant background documents (including relevant strategic documents and reports), contacts and technical inputs with the experts
- convening participants to the peers exchange and ensuring their participation
- the material organization on site (including logistics)
- organising venue and refreshments for the training participants
- the material organization on site (including logistics, interpretation equipment, if necessary)
- the Partner will support SOCIEUX+ in facilitating work of interpreters/translators on-site
- the Partner will provide interpretation for the on-line preparatory meetings and debriefings with the experts mobilized by SOCIEUX+, if needed.

4.2 Deliverables

4.2.1 Pre-mission deliverables

- MeN/TMT: 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:
- **Advisory Note on Social Dialogue and Legislative Negotiations** – brief practical document providing key guidance on negotiation strategies, advocacy approaches, and CTUM's main positions on the Law on Wages and related legislation.

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 TMT:
 - **Training Toolkit and Dissemination Plan on Advocacy and Negotiation** – A set of practical materials, including case studies and exercises, to support Task Force members in training trade union representatives. Experts will provide a structured training matrix and a dissemination plan to ensure a coordinated and consistent approach within CTUM. The plan will outline objectives and outcomes of learning, delivery methods, means of instructions and evaluation, dissemination strategy and learning resources.

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 & 2

Principal expert (Expert #1):

Area(s) of expertise: Social Dialogue and Trade Unions

Specific skill(s) & competency(ies): 2.1.L&R making and development, 1.2.P&S making and development, 1.1.Governance, transparency & accountability, 8.1. Needs assessments & curricula

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**

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

- d) Other essential qualification(s):

- Relevant experience in trade union governance and dialogue;
- Experience in trade union organisation and management;
- Experience in conducting assessments and delivering trainings;

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

Activity 1

Expert #2:

Area(s) of expertise: *Labour Legislation and Labour relations*

Specific skill(s) & competence(s): *2.1.L&R making and development, 1.1.Governance, transparency & accountability, 8.1. Needs assessments & curricula*

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): **5**

- c) Required language knowledge: **English**

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

- d) Other essential qualification(s):

- Substantial knowledge of legislative and administrative mechanisms related to the labour and social dialogue;
- *Experience in conducting or participating in training needs assessments*
- Significant experience in individual and organisational capacity assessment and training delivery for trade union members

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.

Activity 2

Expert #2:

Area(s) of expertise: Trainer on Labour Legislation and Labour relations

Specific skill(s) & competence(s): 8. Individuals' capacity building/training; 1.1. Governance, transparency & accountability, Change management & facilitation;

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:

- o 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,
- o 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): **5**

- g) Required language knowledge: **English**

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

- h) Other essential qualification(s):

- Relevant experience in trade union organisation and management;
- Significant experience training delivery for trade union members;

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.

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Collaborative institutions:

Public or publicly mandated institutions from European Union Member States with relevant expertise and competencies as outlined above are also encouraged to directly apply and contact SOCIEUX+ to provide expertise and participate in these/this activity. Focal points and responsible staff may directly contact the SOCIEUX+ Team at:

experts@socieux.eu, indicating the reference of the call for experts.

6.2 Estimated workload

Activity 1&2 – one principal expert will be engaged for the duration of both activities

	Preparation	On-site work	Distance work	Reporting & deliverables	Total
Principal expert (#1)	11	10	0	7	28
Total experts	11	10	0	7	28

Activity 1

	Preparation	On-site work	Distance work	Reporting & deliverables	Total
Expert (#2)	3	5	0	3	11
Total experts	3	5	0	3	11

Activity 2

	Preparation	On-site work	Distance work	Reporting & deliverables	Total
Expert (#2)	5	5	0	2	12
Total experts	5	5	0	2	12

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 valide email address.
2. Login details for their account will be sent to experts by email, experts should create and submit their profile for review by²:
 - 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 format³.
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 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.

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

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

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

³ 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...]

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ABOUT SOCIEUX+

The SOCIEUX+ Facility was established and funded by the EU through the European Commission's Directorate-General for International Partnerships (DG INTPA) and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). The Facility is co-funded by France, Spain, and Belgium. It is implemented by a partnership composed of Expertise France (the partnership lead), 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