



Co-funded by
the European Union

socioux+

EU Expertise on Social Protection,
Labour and Employment

Terms of Reference for Experts

Terms of reference activities
and missions

SOCIEUX 2024-20 MONTENEGRO

For external dissemination



SOCIEUX+ is implemented and co-funded by

Partnership led by



CONTENT INDEX

1.	Background information	4
1.1.	Country Overview	4
1.2.	Sector Situation	4
1.3.	Role of Partner Institution in the Sector	5
2.	Action Description	6
2.1.	Overall Objective	6
2.2.	Specific Objective(s) (Purpose)	6
2.3.	Expected Results	6
2.4.	Final Deliverables	7
3.	Methodology	7
3.1.	General Methodology (of the Action)	7
3.2.	Planned Activities (Work Plan of the Action)	8
3.3.	Inclusion of cross-cutting issues	8
4.	Activities description	9
4.1.	Tasks	9
4.2.	Deliverables	10
4.2.1.	Pre-mission Deliverables	10
4.2.2.	Final Deliverables	10
5.	Reporting and submission of deliverables	11
5.1.	Formats	11
5.2.	Submission and approval	12
5.2.1.	Pre-mission deliverables	12
5.2.2.	Final deliverables	12
6.	Required expertise	13
6.1.	Expertise profile	13
6.2.	Estimated workload	14
7.	Applications	16
7.1.	Call for Experts	16
7.2.	Selection of Experts	16
7.3.	Contracting of public experts	17
7.4.	Financial compensations	18
7.5.	Travel costs	18
8.	Communication & Visibility	18
9.	Code of conduct	18
10.	Other considerations	19
11.	Annexes	19
	About SOCIEUX+	20

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 3 (on-site) – Development of a proposal for job roles, resource allocation, and external communications organization: tentative dates from **August 18th to October 03rd, 2025** (with an on-site mission from September 08th to 12th, 2025)

1. **Preparation phase:** from August 18th to September 05th, 2025
2. **On-site mission in Podgorica:** from September 08th to 12th, 2025
3. **Reporting phase:** from September 15th to October 03rd, 2025

Expert positions and responsibilities (by activity):

- Activity 3 : Expert #1 (*principal*) – *Expert in human resources*
- Activity 3 : Expert #2– *Expert in organisational development (change management oriented)*

Workload:

Activity #3 - Expert #1 :Total_12_days (7_days at distance; and 5_days onsite)

Activity #3 - Expert #2 :Total_11_days (6_days at distance; and 5_days onsite)

Call for experts' reference: 24-20/MNE/3/1, 24-20/MNE/3/2

Version - #: __

Draft

Final

Date: April 15th, 2025

1. Background information

1.1. Country Overview

Montenegro is a country located in South-Eastern Europe, the capital is Podgorica. Montenegro has a surface of 13 883 square meters and a population of approximately 613,100 inhabitants. Montenegrin is the official language of the country, other languages such as Bosnian, Croatian, Serbian and Albanian are also used officially. Montenegro is a parliamentary republic and gained its independence from Serbia in 2006. Presidential elections took place in April, 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).¹

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

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

¹ 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>

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 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

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

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)

The action aims to develop Communication Strategy, 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 of the institution.

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 #3.

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.
- 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 **Error! Reference source not found.**). 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, 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 3

The third activity will be implemented on site in Podgorica. Experts will draft proposal for organisation of communication related jobs in the Fund with the aim to advance and optimize communication-related roles and workflows. Currently, two persons are employed in the Communications Unit, in addition to implementing tasks beyond their core responsibilities. Furthermore, the Fund's communication-related processes are underdeveloped. This activity will include the proposal of internal and external communication-related roles and responsibilities, the creation of job and service descriptions, and the development of an updated workflow.

The proposed activity contributes to the Fund's communication procedures and processes. This will involve creating a communication process framework that will define the steps, roles, and responsibilities in managing communications with stakeholders. Additionally, the proposal will define interaction frameworks to ensure smooth coordination between different communication functions and enhance the overall efficiency of external communication practices. The proposal will outline the materials and equipment required for each process and provide an overview of the capacity-building needs for the assigned Funds staff.

Minimum tasks expected from the experts shall include:

Task 1 – Preparation of the Mission

The Experts Team:

- Gains 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 (Training) Methodological Note (TMT, MeN) for approval by the SOCIEUX+ Team.
- Participates in a pre-departure briefing with the SOCIEUX+ Team (approximately one week before the mission).

Task 2 – Implementation of the Mission

The Experts Team:

- Reviews and finalises the mission agenda and the list of stakeholders to be consulted with the PI upon arrival; any changes to the MeN shall be communicated to the SOCIEUX+ Team in a timely manner.
- Organises, as necessary, a brief presentation of the mission's objectives and methodology for the PI and relevant stakeholders.

- Provides a briefing on the background of the request and mission's objectives to the EU Delegation, if applicable.
- Conducts consultations with the PI's executives and staff, as well as relevant stakeholders, including the EU Delegation, as per the agenda.
- 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 on-site debriefing.
- Channels to SOCIEUX+ Communication Officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).
- Liaises with the SOCIEUX+ Team at every stage of the implementation regarding doubts about the eligibility of proposals raised by the PI, politically sensitive developments, or any other relevant issue that may require a formal position from 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.
- 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:

- Prepares the final deliverables for review and feedback 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, specifying meetings and working sessions to be held, persons to meet, etc. The Methodological Note shall not exceed five pages (excluding the cover page and annexes).

4.2.2. Final Deliverables

- D1: An individual Expert Mission Report (ExMR) in SOCIEUX+ format (template provided). This report is a confidential product intended solely for SOCIEUX+'s use. 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 regarding 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 the ToREx and further agreed upon in the MeN:

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

The proposed non-exhaustive list of the content for the organisation of communication-related jobs should include the following:

- Role Identification
 - Definition of internal and external communication-related job/service roles
 - Development of job/service descriptions outlining responsibilities, core tasks, and required competencies
- Workflow and Interaction Frameworks
 - Creation of communication workflows for routine and strategic tasks (e.g., media responses, public statements, internal updates)
 - Establishment of a communication process framework, ensuring clear steps, roles, responsibilities, and accountability
 - Definition of coordination mechanisms across departments and units involved in communication
 - Clarification of points of collaboration, feedback loops, and escalation procedures
- Staff Training and Resource Allocation
 - Development of a capacity-building plan to address skill gaps and enhance performance
 - Resource and equipment planning to ensure the availability of necessary tools and platforms for communication tasks
 - Creation of internal support structures, including mentoring, peer learning, and internal coaching
- Implementation Roadmap
 - Timeline and phases for implementing the new communication structure and workflows
 - Monitoring mechanisms for assessing progress and ensuring effective execution

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 equivalent OpenDocument format). Non-editable electronic documents, such Portable Document Format (PDF), will 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 is not allowed unless otherwise instructed in writing [by email] to the experts by the SOCIEUX+ Team.

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

“Disclaimer:

The responsibility of this publication lies solely with its authors. Neither the European Union, the European Commission, the implementation partners of SOCIEUX+, nor the SOCIEUX+ Staff are 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 must 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 the 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 upon with the Partner Institution and then submitted to the SOCIEUX+ Team no later than five working days before the departure on mission of the Experts Team.
- Pre-mission deliverables will be shared with and reviewed by SOCIEUX+. Feedback on the deliverables should be provided to the Experts Team no later than two working days before the departure on the mission of the experts. Comments and recommendations from 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 resubmitted by the Experts Team at the earliest possible occurrence.

5.2.2. Final deliverables

- The first draft versions of the final deliverables must be submitted by the Experts Team to the SOCIEUX+ Team no later than ten working days after the completion of the Experts Team's mission.
- Feedback from the SOCIEUX+ Team on the first draft version of the report should be provided within five working days of its submission.
- The Experts Team is expected to incorporate this feedback into the draft versions within five working days of receiving 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 must approve or provide comments and/or requests for amendments within five working days of receipt.
- If comments and/or requests for amendments are received, the Experts Team will have an additional five working days to finalize the deliverables. Generally, only one round of feedback and revision is permitted.
- 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

Principal expert (Expert #1): Expert in human resources

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

Specific skill(s) & competency(ies): Organisational management; Human Resources Management & Development; Policy & Strategy steering and implementation; Monitoring & Evaluation(M&E);

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 communication processes

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

h) Having passed the SOCIEUX+ e-learning ‘[Acting upon inequality](#)’. SOCIEUX+ aims to do no harm and contribute to the reduction of inequalities. Hence, we highly recommend doing this short e-course. It takes about 2h30.

Expert (Expert #2): Expert in organisational development (change management oriented)

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

Specific skill(s) & competences: Organisational management; Organisational structures, roles and arrangements, change management & Facilitation

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): 7

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
- Experience providing advice to public institutions in adapting and optimizing their human resources, processes and structures

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

h) Having passed the SOCIEUX+ e-learning ‘[Acting upon inequality](#)’. SOCIEUX+ aims to do no harm and contribute to the reduction of inequalities. Hence, we highly recommend doing this short e-course. It takes about 2h30.

!!!!!!!

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 contact the SOCIEUX+ Team at experts@socieux.eu, indicating the reference of the call for experts.

6.2. Estimated workload

Preparation	On-site work	Distance work	Reporting & deliverables	Total
-------------	--------------	---------------	--------------------------	-------

Principal expert (#1)	3	5	0	4	12
Expert (#2)	3	5	0	3	11
Total experts	6	10	0	7	23

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 available only in English). The application process is as follows:

1. If they have not already done so, experts must create a SOCIEUX+ account by clicking “Create an account” and providing 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 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”.
4. Regional experts: If regional experts are part of the team, they will be selected through a non-competitive process.

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

For more information, 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

SOCIEUX+ primarily mobilises experts from the public administrations and mandated bodies of EU Member States, as well as 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.
- Regional experts: they provide significant added value, since they belong to the institutions with which SOCIEUX has already worked in the region where the action will be carried out. In addition, regional experts/s can provide a contextualized perspective on the socio-political, economic and cultural realities of the region, which reinforces the relevance, feasibility and sustainability of proposals and outcomes.

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>

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 the "Supporting Entity" in the Request.

Only short-listed applicants may be contacted. The selection process may include interviews by phone or other communication methods.

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 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, regardless of whether their former employer collaborates with SOCIEUX+ on a specific action. Retired experts are considered public experts for all purposes, benefits, and financial compensation provided by SOCIEUX+.

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

Contracting Options:

- **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 servants 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 under local legislation; or
 - > Service contract with institution: experts without a TIN and unable to sign an employment contract under local legislation.
- **Regional expert**: Depending on local legislation and the preferences of the expert's institution, the contract will be signed either directly with the expert or with the institution to which he/she belongs.

7.4. Financial compensations

Contracted 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 treated as public employees for all intents, purposes, benefits and financial compensation 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+. Compliance and verification are the responsibility of 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 in accordance with the [Guide for Experts and Collaborative institutions](#) (version as of the date of the contract signature), which provides detailed information on contracting with SOCIEUX+.

8. Communication & Visibility

SOCIEUX+ may use its communication channels, such as its website, newsletter and other media to share information on the implementation and results of the activities. To this end, contributions from mobilised experts are envisaged.

Small contributions for communication and visibility purposes, such as photographs, short texts and interviews, may be requested. Before and after the mission, short briefings may be organised with the SOCIEUX+ Communication Officer. These briefings will provide an opportunity to identify communication opportunities and strategies.

For specific activities and events and under certain circumstances, visibility products such as brochures, folders, USB sticks, notebooks and other products may be made available to experts for face-to-face distribution.

9. Code of conduct

Experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity through the delivery of products. The SOCIEUX+ Team will support experts in fulfilling their assignments by assisting and advising on the preparation of background materials before meetings. The SOCIEUX+ Team will also collect feedback from partner institutions and relevant stakeholders to ensure that mission reports and recommendations are delivered to national authorities, EU Delegations in partner countries, and the European Commission.

Experts mobilized do not represent SOCIEUX+ or the EU. Their technical opinions and recommendations are their own and do not reflect the official stance of SOCIEUX+ or the EU. They shall refrain from expressing negative opinions about the implementation of actions supported by SOCIEUX+ to third parties. However, they should be familiar with SOCIEUX+'s objectives and operations and promote its services to the best of their knowledge, whenever possible and feasible.

Experts shall perform their duties in the partner country in a manner that fully respects local institutions, policies, and cultural norms. They shall adopt culturally sensitive behavior when interacting with their local counterparts.

10. Other considerations

n/a

11. Annexes

n/a



Co-funded by
the European Union

About SOCIEUX+

SOCIEUX+ EU Expertise on Social Protection, Labour and Employment is a technical cooperation facility established and co-funded by the European Union (EU), France, Belgium and Spain. It aims to enhance access to better employment opportunities and inclusive social protection systems, with a particular focus on women, youth, and vulnerable groups.

The Facility focuses on strengthening institutional capacities in partner countries, promoting social protection, decent work and responsible business practices. It also supports public institutions in preparing for and responding to EU directives and Member States' legislation on Corporate Sustainability Due Diligence expectations.

SOCIEUX+ targets partner countries' public authorities responsible for labour, employment, and social protection, as well as social partners, including employers' and workers' organizations involved in social dialogue. These entities are encouraged to apply for SOCIEUX+ technical cooperation.

Activities carried out by SOCIEUX+ are demand-driven, short-term, and primarily based on peer-to-peer cooperation between experts from EU Member States and partner countries.

SOCIEUX+ is implemented by a partnership composed of Expertise France (the partnership lead), France Travail, the Belgian Federal Public Service for Social Security through the Belgian International Cooperation on Social Protection (BELINCOSOC), the Belgian Development Agency (Enabel), and the Fundación para la Internacionalización de las Administraciones Públicas (FIAP) from Spain.

More information: www.socieux.eu



SOCIEUX+ is implemented and co-funded by

Partnership led by

