socieux+

EU Expertise on Social Protection, Labour and Employment

Terms of Reference for Experts

Terms of reference for onsite training missions or e-learning activities

SOCIEUX 2025-13
MOLDOVA

For external dissemination

CONTENT INDEX

Terms of reference for on-site activities and missions

Action code and partner country: SOCIEUX 2025-13 MOLDOVA

Action title: Strengthening Moldova's preparedness to integrate EU Social Security coordination mechanisms

Partner institution: National Office of Social Insurance of the Republic of Moldova (NOSI)

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

- Activity 2 – Introductory training and roadmap development for EU Social Security Coordination and EESSI Integration

Tentative dates of implementation and location:

- o Remote preparation: October 13 – November 7, 2025
- o On-site implementation (Chișinău): November 10 - November 21, 2025
- o Remote reporting: November 24 - December 12, 2025

Expert positions and responsibilities (by activity):

- Expert 1 (principal) – EU Social Security Coordination, Institutional Diagnostics, and Reform Planning
- Expert 2 – Operational Implementation of EU Social Security Coordination Regulations and EESSI
- Regional expert 3 - Practical implementation of EU Social Security Coordination and EESSI integration in an EU candidate country

Workload:

Expert 1: Total 19 days (9 days at distance; and 10 days onsite)

Expert 2: Total 18 days (8 days at distance; and 10 days onsite)

Regional expert 3: Total 9 days (4 days at distance; and 5 days onsite)

Call for experts' reference: 25-13/MDA/2

Version - 1 ☐ Draft   ☒ Final   Date: June 16, 2025

1. Background information

1.1. Country Overview

The Republic of Moldova is a landlocked country in Eastern Europe, bordered by Romania and Ukraine. It is a parliamentary republic with a population of approximately 2.5 million. Moldova has experienced significant political and economic transformation since gaining independence in 1991, with a strong aspiration toward European Union integration. In June 2022, the European Council granted Moldova EU candidate status, recognizing its reform commitments and geopolitical alignment.

Economically, Moldova is classified by the World Bank as a lower-middle-income country. The economy is predominantly service-based, with agriculture and remittances also playing significant roles. According to UNDP's Human Development Report 2023, Moldova ranked 80th out of 191 countries, with a **Human Development Index (HDI) of 0.767**, placing it in the "high human development" category (UNDP, 2023).

Despite macroeconomic progress, Moldova faces structural vulnerabilities, including high emigration, demographic ageing, rural-urban inequalities, and a large informal labour market. These factors pose challenges to the sustainability of public finances and the adequacy of the social protection system.

The Government has aligned its national development agenda with the **Sustainable Development Goals (SDGs)**. According to the 2022 Voluntary National Review (VNR), Moldova has made moderate progress toward SDG 1 (No Poverty), SDG 3 (Good Health and Well-Being), and SDG 8 (Decent Work and Economic Growth), but faces persistent gaps in social protection coverage, institutional capacity, and digital governance.

Ongoing reforms supported by EU instruments—including the EU Association Agenda and the EU-Moldova Accession Plan—prioritize digitalization, governance reform, and social sector alignment with EU acquis.

1.2. Sector Situation

The social protection system of the Republic of Moldova is governed by a mix of contributory and non-contributory schemes. The **National Office of Social Insurance (NOSI/CNAS)** is the central body responsible for administering the state social insurance system, including pensions, maternity, family, disability, and survivors' benefits. The **Ministry of Labour and Social Protection** oversees policy formulation and implementation in the wider field of social protection and inclusion.

The legal and policy framework of the sector includes the Law No. 489/1999 on the Public Social Insurance System and Law No. 156/1998 on Public Pensions. Moldova is party to 18 bilateral social security agreements with EU Member States and neighboring countries, which govern benefit coordination for mobile citizens.

A major challenge for Moldova, as an EU candidate country since 2022, is the progressive alignment with **EU social security coordination regulations**, notably Regulation (EC) No. 883/2004 and its implementing Regulation (EC) No. 987/2009. These establish rules for determining applicable legislation, aggregating insurance periods, and ensuring portability of social security rights across EU countries.

In line with these regulations, the EU has developed the **Electronic Exchange of Social Security Information (EESSI)** system to enable structured and secure data sharing between

competent institutions. The implementation of EESSI in Moldova is explicitly foreseen in the draft **National Development Plan for 2026–2028**, under the strategic objective of a "Strong and Inclusive Social Protection System" (Government of Moldova, Draft GD of 28.03.2025).

The **Law No. 142/2018 on Data Exchange and Interoperability** mandates all public institutions in Moldova to use the national MConnect platform for data sharing, including for cross-border exchanges, under conditions compatible with national and EU data protection rules.

Despite this legal foundation, Moldova's systems remain insufficiently prepared. NOSI operates the "Social Protection" information system based on outdated Oracle Forms technology, which limits its compatibility with modern platforms. Coordination with other institutions, such as the National Health Insurance Company (CNAM) and the National Employment Agency (ANOFM), is constrained by fragmented IT infrastructures and weak interoperability mechanisms.

Parallel to this, a **SOCIEUX+ action (2024-15)** is supporting the National Health Insurance Company (NHIC) in setting up the **European Health Insurance Card** mechanism, a requirement for cross-border healthcare access under EU law. This involves analysis of the legal framework, capacity-building, and the development of an operational roadmap, including a study visit. This action is highly complementary to the SOCIEUX+ support to NOSI, as both EESSI and EHIC are essential pillars of EU social protection coordination.

1.3. Role of Partner Institution in the Sector

The **National Office of Social Insurance (NOSI)** is a central public body under Moldovan law tasked with implementing the state's social policies by managing the **State Social Insurance Budget (SSIB)**. Its responsibilities include collecting contributions, maintaining records of insured persons, and administering the payment of pensions and other insurance-based benefits.

NOSI also acts as Moldova's competent liaison body for international coordination of social security rights under bilateral agreements and, in future, EU regulations. It has a legal and institutional mandate to engage in data exchange with foreign institutions, manage social risk contingencies, and modernize digital services to increase accessibility and reduce administrative burden for citizens.

NOSI's principal challenge is preparing for the structured electronic exchange of social security information through the **EESSI system**, in accordance with EU Regulation No. 987/2009. Currently, data exchange with foreign institutions is handled manually—either via post or email—leading to delays in processing pensions and benefits for Moldovan citizens abroad.

The **Social Protection** IT system used by NOSI is based on a legacy platform (Oracle Forms) that is no longer fit for integration with EU systems or capable of supporting modern APIs and secure data transmission protocols. This technological gap undermines the institution's ability to participate in EESSI and fulfil EU regulatory requirements.

Legal alignment is also incomplete. While Moldova's data exchange framework is regulated by **Law No. 142/2018**, procedural guidance and inter-institutional coordination mechanisms for cross-border data sharing are still underdeveloped. Furthermore, NOSI lacks internal policies, standard operating procedures, and human resource capabilities to ensure compliance with the EESSI framework (e.g., BUCs and SEDs workflows, port configuration, digital security protocols).

Institutional capacities also need reinforcement. Business process reengineering, digital skills development, and clearer delineation of responsibilities within NOSI are required to manage the future EESSI workflow effectively. Finally, communication with other relevant agencies (e.g., CNAM, Ministry of Labour) must improve to achieve the necessary interoperability and avoid fragmented implementation.

NOSI currently implements 18 bilateral social security agreements with EU Member States and associated countries, including Germany, Italy, Spain, Poland, and Romania. These agreements guide the coordination of benefits for Moldovan citizens residing abroad and serve as a legal basis for international data exchange.

In 2024, with support from the **TAIEX instrument of the European Commission**, NOSI conducted a study visit to **Sodra (Lithuania)** to examine how EU regulations are implemented in practice, specifically regarding the exchange of death-related data under international agreements.

At the time of the request, no other international partners had been identified for support on EESSI integration, making **SOCIEUX+ action 2025-13 the first structured technical cooperation focused on Moldova's alignment with Regulations 883/2004 and 987/2009** and the operational rollout of EESSI.

This SOCIEUX+ action complements national objectives outlined in the **National Action Plan for EU Accession (2024–2027)** and the forthcoming **National Development Plan 2026–2028**, which both recognize the strategic need for cross-border digital exchange systems in social protection.

2. Action Description

2.1. Overall Objective

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

2.2. Specific Objective(s) (Purpose)

To enhance institutional capacities of social security institutions in Moldova for implementing EU social security coordination regulations (883/2004 and 987/2009), including the EESSI system.

2.3. Expected Results

1. Specific challenges and opportunities for implementing EU social security coordination regulations and the EESSI system in Moldova identified

2. A shared understanding and common vision for implementing EU social security coordination regulations and the EESSI system in Moldova established

2.4. Final Deliverables

D. 1:   Diagnostic report with tailored recommendations on Moldova's readiness to integrate EU Social Security coordination mechanisms, including the EESSI system.

D. 2.1: Training materials on EU Social Security Coordination mechanisms, including the EESSI system.

D. 2.2: Draft roadmap to prepare for integration into the EU Social Security coordination mechanisms, including the EESSI system

3. Methodology

3.1. General Methodology (of the Action)

As an EU candidate country, Moldova is advancing its alignment with European standards, with social security coordination being a key area for accession. Regulations 883/2004 and 987/2009 provide the legal framework for the coordination of social security systems across EU Member States, ensuring that citizens' rights are protected as they move within the EU. The Electronic Exchange of Social Security Information (EESSI) system is essential for the practical implementation of these regulations, enabling secure and efficient data exchange between national institutions.

However, Moldova currently faces significant challenges in legal harmonization, IT infrastructure, inter-institutional coordination, and human resource capacity. These gaps-explicitly identified in the Partner's request for technical cooperation and consistent with the experiences of other EU candidate countries must be addressed to enable effective implementation of EU social security coordination mechanisms and successful participation in the EESSI system, when Moldova advances toward EU integration.

The proposed action directly responds to these needs and is structured around two main activities. First, a comprehensive diagnostic mission (A.1) will assess Moldova's current readiness towards EU social security coordination mechanisms & EESSI integration, focusing on legal, organizational, procedural, IT, and governance aspects. This participatory process will map institutional roles, identify bottlenecks, and benchmark practices against EU standards. The findings will be consolidated in a diagnostic report with tailored recommendations (D.1), forming the evidence base for further action.

Building on this, a targeted training and roadmap development activity (A.2) will address the identified gaps by strengthening institutional capacities and fostering a shared understanding among all relevant stakeholders. Training materials (D.1.1) will be developed and delivered to enhance knowledge of EU social security coordination and the EESSI system. A participatory workshop will then facilitate the co-creation of a draft roadmap (D.1.2), defining concrete actions, responsibilities, and timelines for Moldova's integration into EU mechanisms.

In addition, the action foresees the possibility of exploring triangular cooperation with the Ministry of Labour and Social Policy of North Macedonia, which recently benefited from SOCIEUX+ support on the same EU regulations and EESSI integration. Participation from North

Macedonia could be accommodated in one of the two activities, enabling peer learning and exchange of practical experience between two institutions facing similar challenges and working toward the same EU alignment objectives.

Throughout, the action emphasizes stakeholder engagement, cross-institutional collaboration, and alignment with EU best practices, thereby fostering ownership and long-term sustainability. By combining diagnostic analysis, capacity building, and participatory planning, this action will enhance Moldova's institutional capacities (S.1), identify specific challenges and opportunities (R.1), and establish a common vision for implementation (R.2). This structured approach ensures that reforms are technically sound, institutionally embedded, and aligned with EU best practices-laying the groundwork for Moldova's successful integration into the EU social security coordination framework and the EESSI system.

3.2. Planned Activities (Work Plan of the Action)

The following activities are currently planned for the action:

- Activity 1 – Conduct a diagnostic mission to assess IT, legal, organizational, procedural and governance readiness for implementing Regulations 883/2004 and 987/2009 and the EESSI system, with early & structured engagement of all stakeholders

- Activity 2 – Introductory training and roadmap development for EU Social Security Coordination and EESSI Integration

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

- Activity *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.
- Environmental sustainability.
- 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

Objective of the activity

This activity aims to build institutional capacity and establish a shared, actionable vision for the implementation of Regulations 883/2004, 987/2009, and the EESSI system in Moldova, thereby contributing to the second result of the action. It will do so by providing targeted training and

facilitating the participatory development of a practical implementation roadmap, directly informed by the findings of the diagnostic mission (Activity 1).

Proposed methodology

1. **Preparation phase**

- **Review of diagnostic findings:** Analyze the results and recommendations from Activity 1 to identify priority areas for capacity building and roadmap development.

- **Stakeholder mapping and engagement:** Confirm participation of all relevant institutions (e.g., NOSI/CNAS, CNAM, Ministry of Labour and Social Protection, Ministry of Health, National Employment Agency) and ensure the working group is inclusive and representative.

- **Training needs assessment:** Based on the diagnostic, identify knowledge gaps and training priorities for each institution and relevant staff profiles.

- **Training modules:** develop the training modules relevant to the learning objectives, as well as the corresponding training materials and tools, and define the specific target audience in collaboration with the Partner Institution (PI).

- **Co-design of roadmap workshop agenda:** Collaboratively develop the roadmap workshop agenda with the partner institution to ensure alignment with institutional needs and strategic objectives.

2. **On-site phase**

Week 1: Introductory Practical Training

- **Thematic Modules:** Deliver interactive training sessions covering:

  - Key provisions and operational rules of Regulations 883/2004 and 987/2009

  - EESSI system architecture, processes, and compliance requirements

  - Practical case studies and simulations (e.g., cross-border benefit coordination, data exchange scenarios)

  - Roles and responsibilities of each institution in the EU coordination framework

- **Participatory Methods:** Use group exercises, role-playing, and problem-solving activities to encourage knowledge sharing and peer learning.

- **Inclusivity:** Ensure training materials and delivery are accessible and tailored to the diverse backgrounds and functions of participants.

- **E-learning:** the training could rely on the SOCIEUX+ e-learning platform in order to complement the face-to-face training, offer continuous access to learning materials, and centralize educational resources for the participants and possible future similar trainings.

Week 2: Roadmap Co-Creation Workshop

- **Initial Plenary:** Present the main findings from the diagnostic and summarize key learning points from the training.

- **Working Groups:** Organize participants into thematic groups (e.g., legal, IT, organizational, procedural, HR) to identify concrete actions, milestones, and responsibilities for roadmap development.

- **Facilitated Discussion:** Guide groups to prioritize actions based on urgency, feasibility, and impact, ensuring alignment with both EU requirements and Moldova's context.

- **Drafting Sessions:** Consolidate group outputs into a draft roadmap, with clear timelines, responsible actors, and monitoring indicators.

- **Validation:** Present the draft roadmap in plenary for feedback, refinement, and consensus-building.

3. Reporting phase:

- **Synthesis:** Integrate feedback and finalize both the training materials and the draft roadmap.

Proposed Structure for Final Deliverables (to be agreed with the partner institution during the preparation phase)

Deliverable 2.1: Training Materials

1. Executive Summary

2. Overview of Regulations 883/2004, 987/2009, and EESSI

3. Detailed Training Modules (with presentations, case studies, exercises)

4. Reference Materials (EU guidelines, national context, FAQs)

5. Participant Feedback and Evaluation Summary

Deliverable 2.2: Draft Roadmap for Implementation

1. Executive Summary

2. Background and Rationale (linking to diagnostic findings)

3. Implementation Vision and Objectives

4. Priority Actions and Milestones (by thematic area: legal, IT, organizational, procedural, HR, etc.)

5. Roles and Responsibilities (institutional mapping)

6. Timelines and Sequencing

7. Monitoring and Evaluation Framework (indicators, reporting mechanisms)

8. Risk Assessment and Mitigation Strategies

9. Annexes (workshop participation list, group work summaries, supporting documents)

4.1. Training format (week 1)

The training module will be implemented *on-site.*

4.2. Learning objectives

- To be further refined and validated by the experts and the Partner Institution during the preparation phase of the activity:

   1. Gain a clear overview of the purpose and scope of Regulations 883/2004 and 987/2009, including their key principles (e.g., equality of treatment, aggregation of periods, export of benefits, good administration).

2. Recognize the distinction between coordination and harmonization of national social security systems, and understand the implications for Moldova as an EU candidate country.

3. Map the roles and responsibilities of national institutions involved in the coordination of social security, with a focus on inter-institutional collaboration and information exchange.

4. Become familiar with the main processes covered by the regulations (e.g., determination of applicable legislation, benefit calculation, information provision to citizens).

5. Understand the purpose of the EESSI system, its main features, and how it supports secure, efficient, and standardized electronic data exchange between social security institutions.

6. Identify the main steps and prerequisites for Moldova's future participation in EESSI, including digitalization challenges and opportunities for improving administrative cooperation.

7. Foster a common understanding of the roadmap for Moldova's integration into EU social security coordination mechanisms and EESSI, facilitating dialogue and consensus-building across institutions.

8. Encourage active participation and knowledge sharing within the inter-institutional working group to support future implementation and capacity-building efforts

4.3. General methodology of the training module (week 1)

Training activities can be implemented a) on-site or b) remotely (refer to §4.1). In the latter case, the training will be delivered using the SOCIEUX+ E-Learning Platform (https://elearning.socieux.eu); the same Platform can also be used, if so decided, in on-site training.

In the preparation phase, Experts will develop the training modules relevant to the learning objectives, as well as the corresponding training materials and tools, and define the specific target audience in collaboration with the Partner Institution (PI). It is recommended that a pre-assessment of the skills, knowledge and learning needs of the audience is made during the preparation phase, through structured interviews of key individuals at the PI or surveying of selected members of the audience.

The findings and training proposals emerging from the preparation phase shall be developed into the 'Training Methodology' (TMT), a template for individual capacity building activities design provided by SOCIEUX+. Experts will indicate the key characteristics of the training (learning objectives, audience, agenda, roles of trainers, etc.) and fill the training Matrix in which the appropriate modules format and tools and the associated materials shall be specified. Experts will also set up means for the verification of learning progress (e.g. intermediate/final assessment).

The PI will work together with Experts supporting the preparation and implementation of the activity. One, or more, resource person(s) shall be appointed by the PI to support experts in the material and technical organisation of the trainings. The organisation of the logistics necessary for the activity and ensuring attendance is of the responsibility of the PI; in particular, the PI will have the responsibility to invite participants to the training's venue and to ensure attendance. In case of remote training, logistic support encompasses the provision of connectivity for participants to be able to join the E-Learning Platform; in parallel, SOCIEUX+ Team will support participants to enrol and have access to the Platform.

At the end of the trainings, upon assessment, participants may be awarded an attendance certificate. Certification of participation will only be provided for trainings whereby final-scored assessments of and feedback questionnaires (PAF) by participants have been collected.

4.4. Main tasks of the expert team

The principal expert will lead the on-site mission. He/she/they will be responsible for producing all activity deliverables (see Section 4.2 below). He/she/they will be also responsible for preparing, coordinating, implementing and reporting the overall activity towards SOCIEUX+.

4.4.1. Preparation

1. Ahead of the on-site mission, gain substantial knowledge of the local context; review relevant background documents provided by SOCIEUX+ and the PI, including the final diagnostic report from Activity 1.

2. Develop learning sub-objectives and define the specific target audience with the PI; co-develop the mission's methodology and agenda (MeN), ensuring alignment with the findings and recommendations of Activity 1, to be validated by SOCIEUX+.

3. Prepare the training and assessment materials using SOCIEUX+ templates, based on identified needs and priorities; this includes relevant materials to be uploaded and organized in the E-Learning Platform by SOCIEUX+ Course creator during the week preceding the training.

4. When the E-Learning Platform is used, and in view to allow time to Course creation, submit the Training Methodological Note (TMT) and the required training and assessment materials to SOCIEUX+ team 6 working days before the start of the training.

5. Take part in a pre-mission/pre-departure briefing with SOCIEUX+ team before the mission; when the E-Learning Platform is used, a briefing with the Course creator can be organized during the week preceding the training in view of familiarizing with the format and functionality of the E-Learning Platform.

6. Prepare a preliminary structure for the roadmap, based on identified needs and priorities

4.4.2. Implementation

1. Upon arrival, review and finalise the agenda of the mission and the list of stakeholders to be consulted with the PI; any changes to the MeN shall be timely communicated to the SOCIEUX+ Team.

2. Organise, as necessary, a brief presentation of the objectives and methodology of the mission for the PI and relevant stakeholders.

3. Provide a briefing on the background of the request and objectives of the mission to the EU Delegation, if applicable.

4. Deliver the training sessions and the (pre/)post-training assessment(s), according to the approved Training Methodological Note (TMT), tailored to the gaps and priorities identified in Activity 1.

5. Facilitate participatory workshops for the co-creation of the implementation roadmap, ensuring the active involvement of all relevant institutions.

6. Provide feedback to participants on assessments and key messages to take home.

7. At the end of the training, plan a short final session for participants to complete the feedback questionnaire for participants (PAF) online.

8. Compile the initial findings, main conclusions, and draft roadmap emerging from the peer-to-peer technical exchange in a brief presentation that will be used for the final consultation and debriefing on-site.

9. Present the initial findings, main recommendations, and the draft roadmap to the PI, relevant stakeholders, and the EU Delegation; collect feedback from the PI, relevant stakeholders, and the EU Delegation for inclusion, as possible, in the final draft of the activity's deliverables (training materials and roadmap).

10. Channel to the SOCIEUX+ Communication Officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).

10.4.3. Reporting

1. Elaborate the final deliverables for review and commenting by SOCIEUX+, the PI, and eventually other stakeholders; integrate feedback received and submit the final versions of all deliverables in accordance with SOCIEUX+ guidelines.

2. Submit to SOCIEUX+ all the final deliverables (within 10 working days after the activity); an additional round of adjustments may be conducted in interaction with SOCIEUX+ and the Partner.

3. When the E-Learning Platform is used, make sure that the training materials' final versions are stored in the E-Learning Platform.

4. Provide visibility and knowledge development materials to SOCIEUX+ as relevant. Any materials must be taken/used with the consent of participants.

5. Participate in a debriefing with SOCIEUX+ team.

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 of the activity, as well as in brainstorming sessions, training delivery and in the elaboration of the roadmap and recommendations;

- Contributing to the technical organisation of the activity, including sharing all relevant background documents (such as strategic documents, reports, and the final diagnostic report from Activity 1), providing contacts and technical inputs to the experts as needed;

- Convening and ensuring the participation of representatives from all relevant social security institutions in the training and roadmap co-creation sessions;

- Supporting the material organisation on site (including logistics, venue arrangements, and provision of necessary equipment and materials);

- Facilitating communication and coordination between the experts, SOCIEUX+ Team, and all involved national stakeholders before, during, and after the on-site mission;

- Assisting in the collection of feedback from participants during the final consultation and debriefing sessions, and supporting the integration of this feedback into the final deliverables;

- Promoting the visibility of the activity by facilitating the gathering and sharing of communication materials (e.g., photos, interviews, brief notes) with the SOCIEUX+ Communication Officer;

4.5. Deliverables

4.5.1. Pre-mission Deliverables

- P1: A Training Methodological Note (TMT), detailing the learning objectives, audience, working approach, tools and methods to employ, a risks analysis, etc. (template provided). All training materials are annexed and stored according to instructions.

4.5.2. Final Deliverables

- D1: An individual Expert Mission Report (ExMR) (template provided). It is a confidential product intended solely for SOCIEUX+. The expert team may also submit a single-joint ExMR report.
- D2: An individual Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- D3: A collective Activity Report (AcR) (template provided). This AcR is to be produced jointly by the mission team. It is intended for the PI, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted during the activity. Annex to AcR: All training materials, including assessments and tools developed during the training sessions. Their final versions have to be stored in the SOCIEUX+ E-Learning Platform, if the latter is used.
- 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:
  - **Deliverable 2.1:** Training materials on EU Social Security Coordination mechanisms, including the EESSI system
  - **Deliverable 2.2:** Draft roadmap to prepare for integration into the EU Social Security coordination mechanisms, including the EESSI system

4.5.3. Deliverables expected from Regional or Non-EU Expert (if relevant)

In case triangular cooperation is part of the activity, the regional or non-EU expert shall elaborate distinct deliverables, namely:

- Contribute to Expert Mission Report (ExMR; dedicated section on the sharing on international and regional experiences). Additionally, an individual completed Expert Feedback Form (ExF) shall be completed online (see instructions and link on the ExMR template).
- A technical report compiling the regional models and practices showcased during the activity.

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 six working days before the departure on mission of the Experts Team.
- The validated TMT and supporting materials will be transferred to the creator of the SOCIEUX+ course who will be responsible for uploading and organizing the training materials on the SOCIEUX+ Online Learning Platform during the week prior to the training, in liaison with the experts.
- Pre-mission deliverables will be shared with and reviewed by SOCIEUX+. Feedback on the deliverables should be provided to the FFM Team no later than three 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): EU Social Security Coordination and Reform Planning

Area(s) of expertise: *Social Security Legislation, Social Security Policy, Social Security Administration & Inspection, Information and Communication Technologies*

Specific skill(s) & competency(ies):

1.2. Policy & strategy making and development

3.1. Organisational structures, roles and arrangements

5.1. Monitoring & Evaluation (M&E)

8. Individuals' capacity building/training

Requirements (essential/required):

a) The education type and level required:

"Master's" degree (or equivalent advanced academic degree or diploma requiring 4 years of formal education) in the areas of expertise (see above), or another directly related discipline. In its absence, the master's degree can be replaced by a combination of academic degree(s) with relevant years of work/professional experience combining the area of expertise and specific skills requested:

- 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 <u>shall not count towards the</u> <u>minimum general professional experience.</u>

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

d) Practical experience **implementing Regulations 883/2004 and 987/2009** within an EU national public institution or in the context of international technical assistance.

e) Experience in drafting and facilitating **institutional roadmaps or reform strategies**, based on diagnostic findings, with clearly defined priorities, timelines, and accountability structures — ideally in an EU pre-accession or approximation context.

f) Experience in **designing and delivering capacity-building activities**, including in-person and e-learning, facilitation of peer learning, and participatory workshops.

Additional assets (advantageous in selection):

a) Experience advising governments on EU acquis alignment or convergence in the social protection sector

b) Working knowledge of Moldova's governance context or other EU candidate countries; Romanian or Russian language skills are a plus

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

c) 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 #2: Operational implementation of EU Social Security Coordination Regulations and EESSI

Area(s) of expertise: *Social Security Administration & Inspection, Social Security Policy, Information and Communication Technologies, Health Insurance*

Specific skill(s) & competence(s):

5.3. Information & communication technology

3.1. Organisational structures, roles and arrangements

3.6. Service delivery

8. Individuals' capacity building/training

Requirements (essential/required):

a) The education type and level required:

"Master's" degree (or equivalent advanced academic degree or diploma requiring four 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 substituted with a combination of academic degree(s) and relevant years of work/professional experience combining the area of expertise and specific skills requested:

  o An intermediate academic degree ("Bachelor's", equivalent degree or diploma requiring three years of formal education) plus an additional three years of working/professional experience; or,

  o A first-level academic degree ("License", equivalent degree or diploma requiring two years of formal education) with an additional five years of working/professional experience.

The additional work experience used in calculating academic equivalence <u>shall not count towards the</u> <u>minimum general professional experience.</u>

b) Number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s): 7

c) Practical experience **implementing Regulations 883/2004 and 987/2009** within an EU national public institution or in the context of international technical assistance.

d) Experience supporting the **digitalisation of cross-border processes in social security** institutions (such as EESSI or similar systems), including co-developing implementation roadmaps or strategic action plans, and possessing a deep understanding of administrative and digital processes related to benefit coordination—such as legislation determination, entitlement export, and the use of EESSI for secure data exchange.

e) Experience in **designing and delivering capacity-building activities**, including in-person and e-learning, facilitation of peer learning, and participatory workshops.

f) Required language knowledge: English

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

Additional assets (advantageous in selection):

a) Familiarity with key operational profiles involved in social security coordination (legal, case management, IT, HR, etc.)

b) Working knowledge of Moldova's governance context or other EU candidate countries; Romanian or Russian language skills are a plus

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

c) 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.

Regional Expert #3: Practical implementation of EU Social Security Coordination Regulations and EESSI integration in an EU candidate country

Area(s) of expertise :

• *Social Security Administration & Inspection*

• *Social Security Policy*

• *Social Security Legislation*

• *Information and Communication Technologies*

Specific skill(s) & competence(s):

• *2.2. Legislation & regulation implementation and enforcement*

• *3.6. Service delivery*

• *8. Individuals' capacity building/training*

Requirements (essential/required):

g) The education type and level required:

   "Master's" degree (or equivalent advanced academic degree or diploma requiring four 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 substituted with a combination of academic degree(s) and relevant years of work/professional experience combining the area of expertise and specific skills requested:

   o An intermediate academic degree ("Bachelor's", equivalent degree or diploma requiring three years of formal education) plus an additional three years of working/professional experience; or,

   o A first-level academic degree ("License", equivalent degree or diploma requiring two years of formal education) with an additional five years of working/professional experience.

   The additional work experience used in calculating academic equivalence shall not count towards the minimum general professional experience.

h) Number of years of relevant work/professional experience combining the area(s) of expertise and demonstrated specific skill(s) & competence(s): 7

i) Direct involvement in the **national implementation of EU Regulations 883/2004 and 987/2009,** including institutional alignment and regulatory adaptation in an EU candidate country.

j) Hands-on experience with the **practical rollout or piloting of the EESSI system**, including inter-institutional coordination, IT integration, and staff engagement.

k) Active participation in or facilitation of **peer learning exchanges**, workshops, or technical cooperation (e.g., with SOCIEUX+, TAIEX, or bilateral EU cooperation programmes) with a proven ability to communicate institutional lessons learned and adapt them to the Moldovan context through presentations, discussions, and interactive exchange.

l) Required language knowledge: English

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

Additional assets (advantageous in selection):

d) Official or recent affiliation with a social security institution or ministry that has implemented or piloted EU coordination regulations and/or EESSI in an EU candidate country.

e) Deep knowledge of institutional readiness challenges and change management strategies in EU candidate contexts

f) Ability to present concrete operational solutions, templates, or workflows used during alignment efforts

g) Romanian or Russian language skills are a plus

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

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.

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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 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)	5	10		4	19
Expert (#2)	5	10		3	18
Regional expert (#3)	2	5		2	9
Total experts	12	25		9	46

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.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 by[1]:

    a. Providing contact details

    b. Providing information on the competencies, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, *experts are encouraged to complete in most detail the sections on skills and competencies as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*

    c. Uploading of a curriculum vitae, preferably in Europass format[2].

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.

Experts can be identified and selected following a non-competitive procedure, which applies only in four specific circumstances:

• Experts to be mobilized from a 'preferred institution', i.e. the EU MS public entity indicated by the PI in the REF as the desired and most suitable learning model and source of expertise;

• Experts to be mobilized, on the request of the PI, from a 'supporting entity', i.e. a national or international development partner that supports the PI on the same or a similar area of work concerned by the request;

• Experts to be mobilized to accompany a study-visit by a PI's delegation to a EUMS, i.e. a public expert from one of the EUMS' hosting institutions;

• Experts to be mobilized from PCs or former PIs for triangular cooperation.

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:

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[1] SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) - Regulation (EU) 2016/679.
[2] Europass templates for CVs are available here: http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions

- 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.

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.

The correct use of SOCIEUX+ templates and visibility elements will be ensured in accordance with EU visibility guidelines.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.

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

EXPERTISE FRANCE GROUPE AFD   France Travail   BELINCOSOC Belgian International Cooperation on Social Protection   Enabel   fiap