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EU Expertise on Social Protection,
Labour and Employment

Terms of Reference for Experts

Terms of reference activities
and missions

SOCIEUX 2025-21
Türkiye

For external dissemination



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Terms of reference for on-site activities and missions

Action code and partner country: SOCIEUX 2025-21 Türkiye

Action title: Improvement of the relevance and efficiency of the Ministry's social safety net programme for refugees

Partner institution: Ministry of Family and Social Services (MoFSS)

Activity number and title:

- Activity 2: Assessment of Targeting and Caseload Reduction Strategy

Tentative dates of implementation and location:

- 2-13 February 2026 distance preparation (desk research, drafting of the methodological note and agenda, first distance meetings with the MoFSS, TRC, EUD)
- **16-20 February 2026: on site mission in Ankara**
- 23 February until 6 March 2026: reporting

Expert positions and responsibilities (by activity):

Principal expert (Expert #1): Monitoring and Evaluation Specialist – Social Protection & Cash-Based Assistance

- Area(s) of expertise: Family Benefits (incl. child benefits/family grants/Cash Transfers), Data Analysis, Data Collecting, Survey, Projections
- Specific skill(s) and competency(ies) of expertise: Governance, transparency & accountability, Monitoring & Evaluation(M&E)

Expert #2: Data Systems and Analytics Expert – Social Protection Monitoring & Verification

- Area(s) of expertise: Family Benefits (incl. child benefits/family grants/Cash Transfers), Data Analysis, Data Collecting, Survey, Projections
- Specific skill(s) of expertise: Governance, transparency & accountability, Monitoring & Evaluation(M&E)

Workload:

Activity 2 - Expert #1 : Total 12 days (7 days at distance; and 5 days onsite)

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

Call for experts' reference: 25-21/TUR/2

Date: 17-09-2025

1. Background information

1.1. Country Overview

Türkiye operates under a democratic parliamentary system.

Economically, the country is a significant emerging market with a diverse economy spanning industry, agriculture, and services. However, it faces challenges such as inflation, currency fluctuations, and geopolitical tensions impacting investor confidence. The COVID-19 pandemic further strained economic stability, prompting government interventions to support businesses and households.

In terms of Human Development Index (HDI), Türkiye's latest score places it in the "high human development" category, reflecting improvements in education, healthcare, and standards of living. However, disparities exist across regions, with rural areas often experiencing lower development indicators compared to urban centers.

Regarding Sustainable Development Goals (SDGs), the country has made strides in several areas, including gender equality, renewable energy adoption, and infrastructure development. Efforts to address climate change, promote sustainable economic growth, and enhance social inclusion remain focal points for policy initiatives.

1.2. Sector Situation

Türkiye has developed a comprehensive institutional framework for social protection, with a particular emphasis on cash transfers to vulnerable populations. This system is guided by a mix of constitutional provisions, national laws, government programmes, and cooperation between central and local authorities.

Legal and Policy Framework

The legal foundation for social protection in Türkiye stems from the 1982 Constitution, particularly Articles 2, 10, and 60, which establish the state's responsibility to ensure social justice, equality, and the right to social security. The Social Insurance and General Health Insurance Law No. 5510 (2006) is a core piece of legislation that consolidated various insurance schemes under one framework.

Cash transfers are also regulated under broader poverty alleviation and social assistance policies. Türkiye's Tenth and Eleventh Development Plans (2014–2023), and the National Strategy for the Development of the Social Protection System, have emphasized inclusive growth and reducing income inequality through targeted assistance.

Key Institutions and Stakeholders

The primary institution responsible for social assistance and cash transfers is the Ministry of Family and Social Services (MoFSS). Under this ministry, the General Directorate of Social Assistance (SYDGM) coordinates non-contributory social assistance programs across the country.

Local implementation is carried out through Social Assistance and Solidarity Foundations (SASFs), which exist in every province and district. SASFs are semi-autonomous units under the MoFSS, tasked with identifying beneficiaries, assessing eligibility, and distributing aid.

Other stakeholders include:

- Turkish Red Crescent, playing a key role in humanitarian aid and emergency cash transfers.
- UN agencies and international NGOs, especially in the context of supporting refugees.
- The Social Security Institution (SGK), overseeing contributory schemes but coordinating with MoFSS for comprehensive coverage.

Key Programmes

- Conditional Cash Transfers for Education and Health (CCTE): One of Türkiye's flagship programmes, offering cash to low-income families contingent on school attendance and health check-ups for children. It targets both Turkish citizens and Syrian refugees.
- Home Care Support Programme: Provides cash to families who care for disabled relatives at home.
- Turkey's Emergency Social Safety Net (ESSN): Funded by the EU and implemented in collaboration with the Turkish Red Crescent and UN agencies, this is the largest humanitarian cash assistance programme for refugees in Türkiye, reaching over 1.5 million individuals.
- Regular Cash Assistance for Widows, Orphans, Elderly, and Disabled Individuals: These non-contributory programmes support vulnerable populations through monthly payments.

Systems and Delivery Mechanisms

Türkiye uses an integrated Social Assistance Management Information System (SOYBIS) to streamline application, eligibility determination, and delivery. National ID systems and bank partnerships (notably with PTTBank) ensure transparent and efficient cash transfer delivery.

The current challenge is to balance key priorities: ensuring that refugees in Türkiye are able to meet the basic needs, or at least contributing to their ability to do so, while managing a reducing budget. The fiscal provisions do not allow maintaining the existing number of SSN beneficiaries while incoming financing might be re-directed to support to return cash allocations. The DGSA and TRC have made significant progress by conducting profiling studies and projecting various scenarios for reducing the beneficiary caseload based on different vulnerability levels. The first phase of a proposed step by step caseload reduction has already begun in January 2025. The working age range for the beneficiaries was revised from 18-59 to 18-69 as of January 2025, resulting in a reduction of approximately 35 000 beneficiaries. Furthermore, it was decided in March 2025 to increase the dependency ratio threshold for ESSN beneficiaries from ≥ 1.5 to ≥ 2 , effective July 2025, which is expected to reduce the caseload by around 70 000. A further increase of the dependency ration to ≥ 2.5 is planned for the last quarter of 2025, with an anticipated reduction of approximately 200 000 beneficiaries. However, due to the decreasing funds, the caseload needs to be further decreased.

The current SSN contract also foresees to conduct a Third Party Monitoring. As stated in the SSN contract, TPM could envisage a review of the internal monitoring tools such as Post Distribution Monitoring Surveys, Satisfaction Surveys, quantitative and qualitative data collection through surveys, focus group discussions, household visits and KIIS. TPM may also include:

- A formalised governance structure
- Data sharing and data access protocols
- Internal accountability mechanisms to implement the recommendations of the third-party monitoring

However, the context evolution and the complexity of the programme did not allow to precisely define the scope until today.

1.3. Role of Partner Institution in the Sector

The Ministry of Family and Social Services (MoFSS) of Türkiye is the central government institution responsible for designing and implementing policies related to social welfare, family support, child protection, gender equality, disability services, and elderly care. Its mission is to promote social inclusion, protect vulnerable groups, and strengthen family structures in line with national development goals and international standards.

Key Responsibilities:

- **Social Assistance and Protection:**

Administers non-contributory cash transfer programmes (e.g., support for the elderly, disabled, orphans, widows, and low-income families) through the Social Assistance and Solidarity Foundations (SASFs).

- **Child and Family Welfare:**

Provides services such as foster care, institutional childcare, and family counselling to protect children and support families at risk.

- **Support for Persons with Disabilities and the Elderly:**

Designs and implements home care programmes, accessibility policies, and rehabilitation services.

- **Women's Empowerment and Gender Equality:**

Promotes policies to combat gender-based violence, supports women's shelters, and advances female participation in social and economic life.

- **Social Services for Refugees and Disadvantaged Groups:**

Coordinates with international organizations and NGOs to provide assistance, particularly for Syrian refugees and other displaced populations.

- **Policy Development and Coordination:**

Develops national strategies and legislation in line with the Sustainable Development Goals (SDGs) and coordinates with local governments and civil society for implementation.

The Ministry of Family and Social Services has been one of the leading institutions in the response to the Syrian refugee crisis, together with the Turkish Red Crescent. The MoFSS is directly in charge of the implementation of the Social Safety Net for Refugees in Türkiye Programme since July 2023. It was also responsible for the implementation of the Complementary Emergency Social Safety Net (C-ESSN) since June 2021. The Emergency Social Safety Net and the C-ESSN were merged under the SSN programme in July 2023.

Since the fall of the Assad Regime in December 2024, the returns to Syria in a safe voluntary has started. By early March, some 166 000 Syrians had voluntarily returned from Türkiye. This might have direct implications for the SSN in terms of caseload and the budget to be allocated by the EU.

2. Action Description

2.1. Overall Objective

The institutional capacities of employment, labour and social protection institutions are strengthened and consolidated.

2.2. Specific Objective(s) (Purpose)

The Ministry's social safety net programme for refugees relevance and efficiency are enhanced.

2.3. Expected Results

R. 1: Scope for a third party monitoring of the Ministry's M&E system, verification system and data management is defined - ensuring the requirements of the donor (EU) are met and the need of the implementer (MoFSS) are taken into account.

R. 2: Proposals for new targeting methodology and eligibility criteria are provided.

2.4. Final Deliverables

D. 1: A proposed scope for a third party monitoring assignment

D. 2: A technical analysis outlining potential revisions to targeting modalities and eligibility criteria for cash-based social assistance, accompanied by scenario-based recommendations.

3. Methodology

3.1. General Methodology (of the Action)

For activity 1, mobilized experts' task will be to draft a scope for a TPM of the MoFSS M&E system, verification system and data management. Experts will not be in charge of drafting the final Terms of Reference of the TPM. The task of drafting and publishing the ToRs of the TPM will be in the responsibility of the EU Delegation in Türkiye.

The TPM's goal will be to evaluate the adequacy, robustness, and responsiveness of the SSN's internal monitoring and verification mechanisms. The TPM Will also include assessment and improvement of data access and data-sharing protocols between MoFSS, TRC, and the EU while ensuring compliance with national data protection laws. It should be noted that as per the data protection protocols and legislations of the Ministry, access to the Integrated Social Assistance Information System (hereafter, ISAIS) is not available to third parties. However, the Ministry can support in terms of providing information on how the ISAIS functions.

Experts will be encouraged to apply a gender lens in all tools reviewed and interactions conducted, ensuring gender considerations are reflected in the scope of the TPM, including in proposed recommendations.

Experts will choose their methodology to carry out their assignment; however we can foresee the following methods will be used to draft the scope of the TPM:

- Meta-analysis of tools used (satisfaction surveys, verification process etc.)
- Semi structured interviews with MoFSS/TRC staff responsible for verification
- Review of current data flows and bottlenecks
- Gap analysis against General Data Protection Regulation (hereafter, GDPR) -equivalent standards
- Stakeholder consultations (MoFSS, TRC, EUD legal/data teams)
- Gender audit of existing M&E tools and indicators to assess whether they sufficiently capture sex-disaggregated data and gender-specific outcomes
- Ensure that interview samples and stakeholder consultations include perspectives from women staff and female beneficiaries, especially from underserved groups such as single mothers or women with disabilities, etc.

Experts will work alongside designated MoFSS staff, including the gender unit if available, the Ministry, Turkish Red Crescent teams, gender experts of the Office of the United Nations High Commissioner for Refugees, if available, and the responsible EU Delegation in Türkiye staff.

For activity 2, experts will assess the effectiveness, fairness, and impact of the current and proposed targeting methodology in light of fiscal constraints and policy shifts post-Assad regime change, and propose new models of eligibility criteria.

Experts will ensure that all assessments and recommendations consider the intersectionality of gender with other vulnerability factors (e.g., age, disability, ethnicity), and propose inclusive targeting models that promote gender equity in access to assistance

Experts will choose their methodology, however we can foresee the following methods will be used:

- Desk review of vulnerability criteria and profiling data.
- Quantitative analysis of demographic data and projected caseload reduction.
- Scenario-based impact modeling of reduced cash transfers.

Experts will work alongside designated MoFSS staff (M&E expert), Turkish Red Crescent M&E experts, and the responsible EU Delegation in Türkiye staff.

3.2.Planned Activities (Work Plan of the Action)

The following activities are currently planned for the action:

- Activity 1 – Scope of the Third Party Monitoring (TPM) of the ‘Social Safety Net to Refugees in Türkiye’ (SSN) programme
- Activity 2 – Assessment of Targeting and Caseload Reduction Strategy

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.
- 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 Section **Error! Reference source not found.** below). He/she/they will be also responsible for preparing, coordinating, implementing and reporting the overall activity towards SOCIEUX+.

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 document¹ provided by the SOCIEUX+ Team and/or the Partner institution (PI).
- Establishes in close consultation with the PI the mission's methodology and agenda (TMT – for training – and MeN); then submits them 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 in Türkiye, if applicable.
- Conducts consultations with the PI's executives and staff, as well as relevant stakeholders, including the EU Delegation in Türkiye, 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 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 in Türkiye.
- Collects the feedback of the PI, relevant stakeholders and the EU Delegation in Türkiye 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.

Minimum tasks expected of the Partner Institution:

The Partner Institution shall work in collaboration with the expert supporting the preparation and implementation of the activity. The Partner Institution shall facilitate the organization of the activity with regards to the following aspects:

- nominating one or more internal resource-persons to support the expert in the material and technical organization ;

¹ Data and information appropriate for sharing under the relevant legislation can be shared by MoFSS

- contributing to the technical organization of the activity, including sharing relevant background documents, contacts and technical inputs with the experts ;
- taking care of necessary logistical support to prepare the visit together with SOCIEUX+ team members.

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: **"Assessment of Targeting and Caseload Reduction Strategy"**

- **Below is an example of an outline of the report (D4):**

1. Executive Summary

- Brief overview of the purpose of the assessment
- Key findings on targeting effectiveness and caseload reduction outcomes
- Main recommendations

2. Introduction

- Background of the social protection system/programs under review
- Purpose and scope of the assessment
- Methodology used (data sources, surveys, case studies, etc.)

3. Context and Rationale

- Overview of the Ministry's mandate and social protection objectives
- Description of current targeting approaches (means-testing, categorical, community-based, etc.)
- Drivers of caseload reduction (budgetary constraints, policy shifts, efficiency goals, demographic changes)
- Comparative examples from other countries (if relevant)

4. Assessment of Targeting Strategy

- Design of the targeting system
 - Eligibility criteria
 - Data systems (registries, MIS, digital tools)
 - Coordination with other programs
- Effectiveness
 - Inclusion and exclusion errors
 - Coverage of vulnerable groups (poor households, children, elderly, persons with disabilities, etc.)
- Equity and fairness
 - Regional and demographic distribution
 - Gender and social equity considerations
- Efficiency
 - Administrative costs
 - Timeliness of enrolment and payments

5. Caseload Reduction Strategy

- Rationale and Objectives
 - Why caseload reduction was pursued
 - Alignment with fiscal sustainability and policy priorities
- Mechanisms Used
 - Recertification and revalidation processes
 - Graduation strategies
 - Exit criteria (income thresholds, time limits, etc.)
- Impact Analysis
 - Reduction in caseload numbers (before and after)
 - Effects on poverty and vulnerability levels
 - Potential unintended consequences (e.g., exclusion of genuinely needy households)

6. Stakeholder Perspectives

- Feedback from beneficiaries
- Views of social workers/field staff
- Perspectives from policymakers, NGOs, and development partners

7. Key Findings

- Strengths of the current strategy
- Gaps and weaknesses in design and implementation
- Trade-offs between efficiency, equity, and coverage

8. Recommendations

- Improving targeting methods (e.g., integrated registries, data sharing, proxy means testing, community validation)
- Safeguards to minimize exclusion of vulnerable groups
- Strategies to balance fiscal sustainability with adequate coverage
- Capacity-building for frontline staff
- Monitoring and evaluation framework for continuous improvement

9. Conclusion

- Summary of overall assessment
- Path forward for enhancing social protection delivery

10. Annexes

- Data tables and charts (coverage, error rates, caseload trends)
- Methodology details
- Case studies or beneficiary stories
- Policy documents reviewed

4.2.3. 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 as 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 FFM 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): Monitoring and Evaluation Specialist – Social Protection & Cash-Based Assistance

Area(s) of expertise: Family Benefits (incl. child benefits/family grants/Cash Transfers), Data Analysis, Data Collecting, Survey, Projections

Specific skill(s) and competency(ies) of expertise: Governance, transparency & accountability, 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 years**
- c) Required language knowledge: **English language**
- d) Other essential qualification(s):
- **Experience designing, implementing, and evaluating government-led monitoring and evaluation systems**
 - **Proven track record of supporting national social protection programmes, particularly those involving cash-based transfers.**
 - **Strong understanding of beneficiary targeting, real-time data verification, and independent monitoring modalities.**
 - **Experience working with development partners on policy dialogue and system strengthening for social protection.**

Expert #2: Data Systems and Analytics Expert – Social Protection Monitoring & Verification

Area(s) of expertise: Family Benefits (incl. child benefits/family grants/Cash Transfers), Data Analysis, Data Collecting, Survey, Projections

Specific skill(s) of expertise: Governance, transparency & accountability, 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 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:

- 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,
- 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.

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

c) Required language knowledge: **English**

d) Other essential qualification(s):

- **Experience in data management and analytics related to social protection or humanitarian assistance programmes.**
- **Demonstrated ability to design and assess data systems used in monitoring, verification, and accountability in large-scale public or donor-led cash transfer schemes**
- **Deep knowledge of interoperability, data privacy and protection protocols, especially when dealing with sensitive personal data (beneficiary information, payment records, etc.).**
- **Hands-on experience working with MIS (Management Information Systems) in social protection or humanitarian assistance settings.**

6.2. Estimated workload

	Preparation	On-site work	Reporting & deliverables	Total
Principal expert (#1)	3	5	4	12
Expert (#2)	3	5	3	11
Total experts	6	10	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”.

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 an EUMS, i.e. a public expert from one of the EUMS’ hosting institution;
- 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:

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>

- 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.



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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



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