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EU Expertise on Social Protection,
Labour and Employment

Guide for Institutions & Social Partners in Partner Countries



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This guide provides information about the SOCIEUX+ Facility, its support and modalities of intervention. It is aimed at institutions and social partner organisations in countries that have international cooperation partnerships with the European Union and wishing to collaborate with SOCIEUX+.

The SOCIEUX+ Team is committed to facilitating peer-to-peer exchanges and cooperation among public practitioners, and social partners.

For more information on SOCIEUX+, please visit our website at <https://www.socieux.eu/> or contact us at contact@socieux.eu.

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1. What is SOCIEUX+

1.1. Facilitating peer-to-peer exchanges

The European Union Expert Facility on Employment, Labour and Social Protection (SOCIEUX+) is a technical cooperation facility set up to respond to the needs for capacity building of international cooperation and development partner countries of the European Union (EU). SOCIEUX+ enables peer-to-peer exchanges and institutional cooperation between EU Member States and partner countries.

SOCIEUX+ is results-oriented and demand-driven only. It responds to the direct requests of public institutions and social partner organisations in EU Partner Countries and contributes to designing, expanding, and managing inclusive, effective, and sustainable labour and employment policies and social protection systems.

SOCIEUX+ connects practitioners and institutions by mobilising high-level EU expertise for short-term technical cooperation with their peers outside the EU. It primarily draws on expertise within EU Member States' publicly mandated bodies and social partners and relies on joint actions with specialised international agencies and academia. It capitalises on triangular technical cooperation when necessary by mobilising teams of public experts from the EU and Partner Countries. Private consultants may also complement mission teams in SOCIEUX+ actions.

SOCIEUX+ actions are micro-projects implemented through short-term activities. They are designed in collaboration with the requesting institution to best address their needs. SOCIEUX+ does not provide financial cooperation, such as financing events, purchasing equipment or materials, compensation for work, or staff contributions from requesting institutions and social partners.

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

1.2. Contributing to better social protection, labour and employment

SOCIEUX+ supports policies and measures on social protection, labour and employment, with the aim of alleviating poverty, reducing vulnerability, and providing income security and access to essential services and job opportunities. The Facility advances inclusive social protection and growth, particularly in low and middle-income countries. Since 2024, the Facility also addresses the requirements of the Directive on Corporate Social Due Diligence (CSDD), such as supporting partner countries' legal and policy systems in order to build enabling frameworks to assist local businesses in adopting socially sustainable production patterns.

1.2.1. Social protection

SOCIEUX+ contributes to the design and implementation of social protection systems and programmes that expand coverage and increase equality, inclusivity, efficiency, appropriateness,

and fiscal feasibility and sustainability. On all types of social protection, including social insurance (contributory pensions, health insurance, occupational accidents and diseases, unemployment protection etc.) and social assistance (cash transfers, income guarantee schemes, child and disability grants, public works, social services, etc.) SOCIEUX+ delivers technical assistance for addressing partner countries' challenges in areas like:

- Legal and institutional frameworks for the provision of effective and efficient social protection coverage;
- Individual and organisational capacities for policy making;
- Capacity building for social protection programmes, systems and policy implementation;
- Advocacy and capacity building for mainstreaming cross-sectoral policies and issues related to social protection;
- Advocacy and capacity building for sustainability of domestically funded social protection systems and programmes;
- Portability of social benefits and rights at national and regional levels;
- Social protection coverage and targeting measures;
- inclusion of migrant workers and their dependents, those employed informally or in atypical forms of work;
- Empowering civil society and social partners on social protection;
- Social inclusion of vulnerable groups: women, children, youth, people with disabilities and elderly through active and passive social assistance measures;
- Access to high quality social services including the deinstitutionalisation process;
- Capacity building for social workers and professionalisation of social protection staff;
- Poverty reduction policies and methods;
- Human right based disability assessment and transition to community-based services; and,
- Innovative means of extending social protection coverage in the informal economy.

1.2.2. Labour and employment

SOCIEUX+ contributes to the design and implementation of effective employment strategies and labour market policies, such as:

- Comprehensive employment strategies across various policy areas;
- Labour market information systems and other intelligence and operational research;
- Active and passive labour market policies;
- Compliance with international labour standards;
- Informal labour, inclusive economic growth through job creation and economic transition policies and strategies;
- Employment of vulnerable groups especially migrants, youth, women etc;
- Employment of persons with disabilities;
- Vocational education and training (VET) and skills development;
- Labour intensive public work programmes;
- Labour market intermediation;
- Inclusive labour markets;
- Supporting labour market shifts in line with the green transition;
- Working conditions including occupational health and safety issues;
- Nonstandard forms of employment;
- Social dialogue.

1.3. Partnering with public institutions and social partners

SOCIEUX+ actions can be implemented in 161 partner countries (PCs) and territories eligible to benefit from SOCIEUX+ are the groups of countries covered under the Neighbourhood, Development and International Cooperation Instrument (NDICI) – Global Europe (Regulation - 2021/947) and the Instrument for Pre-accession Assistance (IPA) III (Regulation - 2021/1529) in four global regions:

- Latin America, Asia, and the Middle East;
- Africa, the Caribbean and the Pacific;
- the European Neighbourhood; and,
- EU Overseas Countries and Territories.

SOCIEUX+ cooperates with public authorities and mandated bodies in charge of social protection, labour and employment at all levels (national, regional and local) in partner countries. Public and semi-public sector bodies are eligible, including central governments, ministries, legislative councils, regional governments, and other mandated bodies and institutions responsible for implementing or providing social protection, labour and employment initiatives.

SOCIEUX+ also cooperates with social partners engaged in social dialogue to influence policy and strategic agendas, such as trade unions, employers' and workers' organisations, and associations. Non-governmental organisations (NGOs) advocating for women's rights, informal workers, youth, persons with disabilities, and the most socio-economically disadvantaged groups may be considered eligible on a case-by-case basis. Their eligibility may be subject to their level of sectoral or population representation.

1.4. Promoting synergies

SOCIEUX+ seeks synergistic collaborations in the preparation and implementation of actions. SOCIEUX+ actions deliver results by complementing, rather than replacing, existing national efforts and long-standing cooperation agreements between partner countries, other stakeholders, social partners, and international or bilateral agencies. Medium- and long-term policy agendas remain under the ownership of national stakeholders.

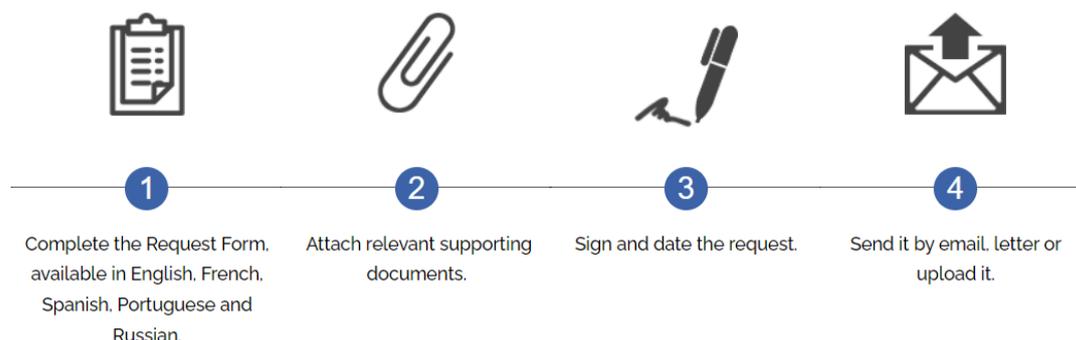
International cooperation agencies and their respective programmes are referred to as “supporting entities” if they have an active role in a SOCIEUX+ action. Supporting entities may accompany the preparation and submission of requests to SOCIEUX+, or the implementation of activities.

2. How to partner with SOCIEUX+

2.1. Submitting a request

Interested institutions and social partners interested in partnering with SOCIEUX+ should download the 'Request Form' available in English, French, Portuguese, Spanish and Russian at <https://socieux.eu/join-us/technical-cooperation/> and:

1. Complete the Request Form;
2. Attach relevant supporting documents and information;
3. Sign and date the request; and,
4. Send the request by email to requests@socieux.eu or upload it to our online platform at www.pmt.socieux.eu. Forms should be submitted in signed pdf or editable Microsoft Word versions.



If you experience difficulty downloading or completing the Request Form, please contact SOCIEUX+ at contact@socieux.eu.

Please note that only one technical cooperation action per institution can be implemented at a time, i.e. simultaneously. The implementation of a new action can start only once all previous actions with the institution have successfully been closed. However, multiple requests can be submitted, assessed and formulated. Still, if more than one request is submitted, the SOCIEUX+ team will consult with your institution to prioritize these requests for a sequential implementation. In all cases, a structured action cannot include more than four (4) short-term activities. SOCIEUX+ can also support actions with single activities. Such activities are limited to contributions to one-time events such as conferences, roundtables, workshops or awareness-raising meetings. For such narrow needs, please use the “Simplified Request for Technical Cooperation” form available at <https://socieux.eu/join-us/technical-cooperation/>.

After receiving the completed form, SOCIEUX+ will promptly notify the requesting institution. The notification may already confirm the eligibility of the request based on its geographic and thematic scope and the legal status of the requesting institution or organisation. Notification of the eligibility of a request is not a confirmation of its approval.

2.2. Formulating a request

Interested institutions and social partners may rely on supporting entities for the formulation of requests (see the above subsection on *Promoting synergies*).

Requests are assessed on essential criteria, such as relevance and feasibility. The list of questions below is indicative of the rubric used by SOCIEUX+ to assess a proposed action. Interested institutions and social partners should keep this checklist in mind when preparing their requests.

2.2.1. Relevance

- Will the proposed action contribute to expanding and improving access to better employment opportunities and inclusive social protection systems?
- Will the proposed action enhance capacities to better design, manage and monitor inclusive, effective and sustainable employment strategies and social protection systems?
- Is the proposed action aligned with national policies and strategies for social protection, labour and employment?
- Are the proposed action's objectives directly linked to the challenges and needs for capacity building and reforms of the requesting institution?

- Does the proposed action consider the implications of crosscutting issues in particular, good governance and democracy, the promotion of human rights, gender equality, non-discrimination, inequalities, children's rights, and the rights of persons with disabilities?

2.2.2. Feasibility

- Are the expected results of the proposed action sufficiently clear and narrow that they could be addressed in a short-term activity (implementable over a reasonable timeframe, such as six months)?
- Can concrete deliverables be produced to achieve the expected results of the proposed action?
- Can the deliverables be produced through short-term activities of one to three weeks?
- Can activities be implemented through peer-to-peer exchanges with experts from EU Member States' public or mandated institutions, or social partners?
- Can staff of the requesting institution, social partners, and other key stakeholders actively participate in the proposed action's activities?

2.2.3. Complementarity

- Is the proposed action not likely to overlap, replace or duplicate the support of international partners other than SOCIEUX+?
- Can the activities be implemented jointly by SOCIEUX+ with another international partner?
- What financial or in-kind contributions are available to support the implementation of the action (from the requesting institution, social partners or supporting entities)?
- Will there be a role in the implementation of the proposed action for the supporting entity that collaborated in the request submission?
- Is there an experience from a particular EU Member States' public institution or social partner that should be considered for the proposed action?
- Could the experience of a particular country in the region complement EU expertise for the proposed action?

2.2.4. Safety and security

The SOCIEUX+ Team considers the security conditions for on-site mobilisation of experts to be of the utmost importance. No action can be implemented in geographic areas where the safety of mobilised experts cannot be guaranteed.

2.3. Agreeing on expected results

Dialogue is initiated early with requesting institutions and organisations to ensure that SOCIEUX+ can make a substantiated recommendation to the European Commission. If necessary, the objectives and results of a potential action are reclarified and narrowed to fit SOCIEUX+'s mandate. Consultation and agreement on these expected results between SOCIEUX+ and the European Commission are necessary before formally initiating the formulation of an action.

An on-site fact-finding mission may be organised to assess the feasibility of an action and subsequently develop an appropriate workplan. Fact-finding missions are implemented by in-house experts from SOCIEUX+, with the support of mobilized thematic experts when necessary. The report of the fact-finding mission and the proposed workplan will form the basis of the recommendation of SOCIEUX+ to the European Commission.

3. What SOCIEUX+ provides

3.1. Formulation of tailor-made actions

Actions are formulated based again on dialogue between in-house experts of SOCIEUX+, partner institutions or organisations, and mobilised experts. The main product of this dialogue between SOCIEUX+ and the requesting institution is a work plan for short-term activities. The work plan is tailor-made and results-oriented in both management and implementation. It remains flexible throughout the action so that activities can be adjusted. Mobilised experts play a key role in work plan reviews and identifying potential follow-up technical cooperation with offered by SOCIEUX+.

SOCIEUX+ activities focus on peer-to-peer exchange. They address structural or institutional needs for capacity building, including:

- Gaps and needs assessment for capacity building;
- Design of capacity building and development measures;
- Sector and functional analysis (and recommendations);
- System design and policy formulation;
- Legal and regulative framework reviews and formulation;
- Strategic planning support;
- Data and information management and processing; and,
- Other relevant interventions, in line with the mandate of SOCIEUX+.

SOCIEUX+ activities generally take place on-site at the partner country level and rely on the mobilisation of mixed teams of public experts. On-site activities are implemented through short-term missions of one to three weeks carried out, generally, by a team of two mobilised experts from different EU Member States or institutions. In practice, *SOCIEUX+ activities* may take different forms, such as:

- Expert advice and consulting on specific technical issues;
- Screening and reviews of documents/programmes;
- Expert support in drafting legislation/strategies;
- Training of trainers;
- Technical trainings;
- Fact-finding/assessment missions;
- Roundtable discussions;
- Thematic workshops; and,
- Other technical assistance that can be provided through short-term, peer-to-peer exchange formats.

SOCIEUX+ may also support single-activity actions for targeted needs, such as high-level regional peer consultations. For these, a simplified procedure is used for the approval of an action.

Technical assistance missions onsite may be complemented, or even replaced, by distance support. Distance support can be an alternative to on-site missions when the partner country's security situation does not allow to undertake on-site missions, and in case the activity consists of a training (of trainers) or of an expert intervention to a conference/event; for the purpose of the implementation of training activities at distances, SOCIEUX+ has set up an online platform for E-Learning.

Under strict criteria, additional measures can complement on-site activities, such as study visits to EU and third countries.

The schedule for activities is owned and set by the partner institution but needs to consider the delays for the identification and mobilisation of experts.

3.2. Mobilisation of adequate and timely expertise

The rapid mobilisation of expertise is a constant effort of SOCIEUX+. The Facility relies on several channels to engage EU Member State institutions and social partners in its actions, including:

- Reliance on national focal points to disseminate calls for experts across EU Member States;
- Publishing calls for experts on the websites of SOCIEUX+ and implementation partners;
- Dissemination and direct contacting of recommended experts, institutions and organisations identified by the partner institution; and,
- Identification of potential experts in the large online database maintained by SOCIEUX+.

SOCIEUX+ also has collaborative agreements with EU Member States' social protection, labour and employment institutions. Collaborative Institutions are recognised in their respective countries for their excellence, and which often have experience in international cooperation.

The terms of reference of the expertise are shared with partner institutions at the early stages of the selection process. In addition to their technical capabilities, SOCIEUX+ aims to mobilise experts with the appropriate language skills, to ensure the smooth implementation of exchanges with partner institutions. By all means, interpretation and translation services may be organised by SOCIEUX+ whenever needed.

SOCIEUX+ also aims to provide to the partner a diversified expertise, which can reflect the richness and variety of the European experience; mobilised teams of experts are therefore composed as much as possible by individuals of two different EU Member States.

Upon selection of experts, the preparation of mission and activities is initiated with the partner institution. Experts participate in the review and framing of activities, while partner institutions retain an active role also in the implementation of activities and the overall mission.

3.3. Sharing responsibilities

Partner institutions have a central and active role in the formulation and, also, implementation of actions. They are the ultimate owners of activities. This ownership is reflected in partner institutions' roles in shaping follow-up activities and work plans, but also in actively contributing human, intellectual and physical resources to their implementation. Such resources include:

- Venues, materials and interpreters (as needed) for trainings, meetings and workshops;
- Publication and translation of reports, manuals and other documentation;
- Transportation of local participants for workshops, seminars or meetings;
- Coordination of logistics associated with the implementation of activities, such as the confirmation of visit schedules, invitations to workshops, and confirmation of appointments;
- Temporary workspace for SOCIEUX+ experts, to ensure the experts are effectively able to collaborate with their peers and counterparts;
- Interpretation and facilitation of exchanges between mobilised experts and their peers;
- Facilitating the travel of mobilised experts, e.g., through invitation letters for visas, and providing advice on accommodation and security conditions;
- Making all relevant staff available for activities; and,
- Reviewing and endorsing documents and deliverables resulting from the technical expertise and the peer-to-peer exchanges deployed in the framework of the activities.

Supporting entities of partner institutions may complement or contribute to the implementation of an activity. When this occurs, SOCIEUX+ recognises and acknowledges these activities as joint efforts in its communication channels and materials.

The support of SOCIEUX+ is limited, not only in time but also in nature. SOCIEUX+ only covers the direct costs associated with mobilising experts; this includes travel costs, financial compensation, and interpretation services when partner institutions cannot provide them. In principle, the translation of products generated through SOCIEUX+ activities should be covered by the final recipients of the deliverables (partner institutions and social partners). SOCIEUX+ does not cover direct financial support, including attendance costs and per diems for participants in meetings or workshops.

SOCIEUX+ support for study visits is strictly limited to the travel costs of small delegations (maximum of 6 delegation members). Partner institutions contribute to the implementation of study visits, among other things, by formulating the learning objectives of the visit. The head of the delegation compiles lessons learned from study visits in a report shared with SOCIEUX+.

3.4. Monitoring and evaluation

In-house experts of SOCIEUX+ accompany the activity from its preparation to the finalisation of its deliverables. These are responsible for:

- Finalising the terms of reference for activities and experts;
- The briefing of mobilised experts before missions;
- Liaising between mobilised experts, supporting entities and partner institutions.
- Debriefing mobilised experts on the completion of missions;
- Reviewing products of experts before delivering to partner institutions;
- Collecting feedback from partner institutions on implemented activities.

SOCIEUX+ evaluates actions and reports results using indicators of capacity building. Feedback from partner institutions is necessary to accurately capture these indicators. Partner institutions provide feedback on the overall process and achievement of results through brief online surveys completed at the end of supported actions or activities. Additionally, the SOCIEUX+ team may contact Partner Institutions several months after the conclusion of the action for on-site ex-post evaluation visits or to distribute short surveys to assess the long-term results and impact of the technical cooperation. Partner institutions may be asked to participate in external evaluations of SOCIEUX+. Partner Institutions' participation in this process will contribute to enhancing future SOCIEUX+ initiatives.

3.5. Participation in knowledge development activities

SOCIEUX+ is committed to generating good practices from supported actions and making these available to the international cooperation community institutions, and social partners interested in social protection, labour, and employment. As such, SOCIEUX+ also translates the experience of selected actions into knowledge products. SOCIEUX+ also participates and organises knowledge development events, where peer-to-peer exchanges are central. Partner institutions are consulted on the development of knowledge products related to their actions. They may be invited to contribute to developing products or events organised or supported by SOCIEUX+.



4. Eligible partner countries

Countries eligible to receive support from SOCIEUX+ are those covered under the Neighbourhood, Development and International Cooperation Instrument (NDICI) – Global Europe (Regulation - 2021/947) and the Instrument for Pre-accession Assistance (IPA) III (Regulation - 2021/1529).

Eligible countries under NDICI Global Europe.

LEAST DEVELOPED COUNTRIES

Afghanistan, Angola, Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Haiti, Kiribati, Lao People's Democratic Republic, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Myanmar, Nepal, Niger, Rwanda, Sao Tome & Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sudan, South Sudan, Tanzania, Timor-Leste, Togo, Tuvalu, Uganda, Yemen, Zambia.

OTHER LOW INCOME COUNTRIES

Democratic People's Republic of Korea, Syrian Arab Republic

LOWER MIDDLE INCOME COUNTRIES AND TERRITORIES

Algeria, Bolivia, Belize, Cabo Verde, Cameroon, Congo, Côte d'Ivoire, Egypt, El Salvador, Eswatini, Ghana, Honduras, India, Indonesia, Iran, Kenya, Kyrgyzstan, Micronesia, Mongolia, Morocco, Nicaragua, Nigeria, Pakistan, Papua New Guinea, Philippines, Samoa, Sri Lanka, Tajikistan, Tokelau, Tunisia, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza Strip, Zimbabwe.

UPPER MIDDLE INCOME COUNTRIES AND TERRITORIES

Albania, Argentina, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Botswana, Brazil, China (People's Republic of), Colombia, Costa Rica, Cuba, Dominica, Dominican Republic, Ecuador, Equatorial Guinea, Fiji, Republic of North Macedonia, Gabon, Georgia, Grenada, Guatemala, Guyana, Iraq, Jamaica, Jordan, Kazakhstan, Kosovo, Lebanon, Libya, Malaysia, Maldives, Marshall Islands, Mauritius, Mexico, Moldova, Montenegro, Montserrat, Namibia, Nauru, Niue, Panama, Paraguay, Peru, Saint Helena, Saint Lucia, Saint Vincent & the Grenadines, Serbia, South-Africa, Suriname, Thailand, Tonga, Turkey, Turkmenistan, Venezuela, Wallis and Futuna.

OVERSEAS COUNTRIES AND TERRITORIES

Aruba (NL), Bonaire (NL), Curaçao (NL), French Polynesia (FR), French Southern and Antarctic Territories (FR), Greenland (DK), New Caledonia and Dependencies (FR), Saba (NL), Saint Barthelemy (FR), Sint Eustatius (NL), Sint Maarten (NL), St. Pierre and Miquelon (FR), Wallis and Futuna Islands (FR).

1 Eligible countries under IPA III.

IPA III BENEFICIARIES

Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Republic of North Macedonia, Serbia, Republic of Türkiye.

* This designation is without prejudice to positions on status and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

COUNTRIES AND TERRITORIES IN THE NEIGHBOURHOOD AREA

Eastern Partnership: Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine

Southern Neighbourhood: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, occupied Palestinian territory (oPt), Syria, Tunisia

Western Balkans and Türkiye: Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, Türkiye



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5. About SOCIEUX+

The European Union (EU) promotes and maintains dialogue on social protection and inclusive employment policies with an increasing number of Partner Countries (PCs). This effort has been set in the 2012 Communication on “Social Protection in European Union Development Cooperation”, which stresses the importance of supporting the development of nationally-owned social protection policies and programmes, including the Social Protection Floors; then confirmed in the European Commission (EC) Communication no. 740: “Proposal for a new European Consensus on development”, entitled ‘Our World, our Dignity, our Future’. A significant number of cooperation initiatives in these fields are funded by geographic or thematic instruments of the EU in different countries. Those initiatives are highly structured and address the medium- to long-term needs of PCs. However, a gap has been observed in the EU cooperation with third countries with regard to providing support to short-term measures and peer-to-peer cooperation to promote the development of social protection, labour and employment systems. The EU Expert Facility on Employment, Labour and Social Protection (SOCIEUX+) responds to this need.

The SOCIEUX+ Facility was established and funded by the EU through the European Commission’s Directorate-General for International Partnerships (DG INTPA) and Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR). The Facility is co-funded by France, Spain, and Belgium. It is implemented by a partnership composed of Expertise France (the partnership lead), 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 Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain.

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

SOCIEUX+ recognises the impact of social protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems. SOCIEUX+ also complements the efforts made through other EU initiatives.

The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

More information: <https://www.socieux.eu/>



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