Guide for Experts

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Purpose of the Guide
The Guide for Experts provides information about the SOCIEUX programme, about the role of experts within SOCIEUX technical assistance Actions, as well as the financial entitlements of experts and logistical arrangements offered by the programme. It is addressed to focal points and potential experts in different organisations collaborating with SOCIEUX.

Scope: this guide applies to all social protection practitioners engaged with SOCIEUX.

1. About SOCIEUX

1.1. What is SOCIEUX?
SOCIEUX - Social Protection European Union Expertise in Development Cooperation - is a technical assistance facility established by the European Commission’s Directorate General for Development and Cooperation – EuropeAid – to support the efforts of to better design, manage, implement and monitor inclusive, efficient and sustainable social protection systems through peer-to-peer short-term technical assistance.

1.2. Areas of technical assistance
In principle, policies and actions in the context of social protection aiming at alleviating poverty, reducing vulnerability as well as providing income security and access to essential services could be supported through individual Actions/Activities.

For practical reasons, SOCIEUX has defined the areas of social protection for which assistance can be provided with the aim of enhancing the capacities of partner countries to better design, manage and implement inclusive, efficient and sustainable social protection systems. The areas of assistance are organised in a) thematic areas of social protection and b) horizontal areas of social protection, as follows:

a) thematic areas of social protection (non-exhaustive list):
   • Access to basic social services such as: education, health and employment;
   • Social Assistance: cash transfer programmes, child and disabled support grants, social pensions and other old age benefits, income guarantee schemes, employment guarantee schemes, public works;
   • Social Insurance: contributory pension schemes, health and accident protection, unemployment protection.

b) horizontal areas of social protection:
   • legal/ regulatory framework;
   • policy/strategy development;
   • management and administration;
   • financing and budgeting;
   • monitoring and evaluations systems, statistics and registration systems;
   • communication and PR;
   • IT systems, etc.
1.3. SOCIEUX’s interventions

SOCIEUX delivers technical assistance Actions composed of several Activities of 1 to 2 weeks. The number of activities of each action will vary depending on the needs of assistance.

The SOCIEUX Actions may range from the very structural aspects, such addressing structural/institutional shortcomings in the beneficiary institutions to interventions that aim at ad-hoc transfer of know-how and expertise to strengthen existing capacities or respond to punctual needs.

In practice, SOCIEUX Activities could take different forms such as:

- assessment or fact-finding missions
- train-the trainer seminars;
- technical trainings;
- roundtable discussions;
- remote support.

1.4. Where will the experts be mobilised?

SOCIEUX is geared towards Activities that take place within the partner country, although approaches such as study visits to third countries, both within and outside the European Union, can also be considered. Potential partner countries will be low-income and middle-income countries from the following regions of the world:

- European Neighbourhood
- Latin America, Asia (including Central Asia) and Middle East
- Africa, Caribbean and Pacific

1.5. How long will Actions and Activities last?

SOCIEUX’s Actions may contain up to 6 short term (1 to 2 weeks) Activities:
1 Action = several Activities; length of each individual Activity = 1-2 weeks

The experts will be mobilised from 1 to 2 weeks per Activity, the same expert possibly being contracted for several Activities within one Action, and therefore repeatedly mobilised.

1.6. How does SOCIEUX work?

Based on requests for assistance submitted by partner countries, the SOCIEUX team will then:

- assess the request and develop a detailed action plan;
- recruit and mobilise appropriate experts, mainly from EU Member States;
- implement a tailored assistance action;
- evaluate achievements;
- ensure further support and follow-up.

The following workflow reflects the facility’s functioning:
1.7. SOCIEUX’s added value for experts

Participating in SOCIEUX is an opportunity for the expert to:

- network, learn and gain or increase international experience;
- improve skills in training under different circumstances;
- get new ideas and inputs from different cultures and perspectives as an inspiration to look "outside-inside”;
- acquire first-hand experience of social protection systems abroad and contribute to enhancing cooperation between the EU and Partner countries.

2. Application and selection of experts

2.1. Eligible experts

SOCIEUX engages experts drawn primarily from public administrations and mandated bodies\(^1\) of the European Union Member States to easily share knowledge and experience. Practitioners from partner countries’ administrations and mandated bodies can also bring added value in a South-South and triangular cooperation. When required, experts from other organisations, such as international organisations, academia, civil society and private consultants could be involved in SOCIEUX’s Actions.

2.2. Expert’s profile

SOCIEUX requires qualified and committed experts who can deliver relevant expertise and share prior experience.

Required skills and expertise are:

- expertise in the respective social protection area(s);
- requested language skills.

Advantages would be:

- previous experience in providing technical assistance in an international context, particularly in developing countries;
- previous experience in the requesting partner country or its geographical region.

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\(^1\) Semi-public bodies dealing with social protection mandated to participate in the project in the same conditions as if they were an integral part of the administration.
2.3. Selection process

2.3.1. Application

There are two ways of applying as a potential SOCIEUX expert:

a) Expression of interest to a specific ToREx

SOCIEUX will draft specific Terms of Reference for Experts (ToREx) for each Action to implement, specifying the objectives and expected results of the Action and the profile of the expert(s) required. The ToREx will be published in SOCIEUX’s website with every specification on the requirements for the application.

b) General expression of interest

SOCIEUX aims at building a database of experts from EU member states, partner countries and other countries’ public administrations and mandated bodies working in social protection. From this pre-elaborated pool of experts and depending on the expert profile required for each Action, SOCIEUX will select the most convenient potential experts to be mobilised. Indications of how to express a general interest in SOCIEUX will also be published on the website of the programme.

2.3.2. Selection

The best experts will be selected and then approved by EuropeAid. The approved experts will be recruited to carry out SOCIEUX Activities based on a standard contract.

Experts are selected in a non-discriminatory and transparent procedure, making use of EU standards in selection procedures.

2.4. What is expected from the experts?

Experts will provide their technical assistance in each Action/Activity from its initial preparatory stages (e.g. drafting the Agenda of the Action or suggesting the methodology to follow) to delivering the expertise and the follow-up of Activities (debriefing and reporting). All Actions/Activities are fine-tuned in close collaboration with the requesting authority and the correspondent European Union Delegation.

The SOCIEUX team will support the experts in the preparation of Actions with background documentation, translation and in drafting documents and training materials. A result oriented facility, the SOCIEUX team will also ensure that mission reports and recommendations are delivered to partner institutions and European Commission services in due time.
The SOCIEUX team assists experts in all travel and accommodation arrangements.

The graphic below reflects the involvement of an expert throughout the different stages of a SOCIEUX Action:

### 3. Financial and logistical aspects

#### 3.1. Contracting

Following the formal approval of EuropeAid, the SOCIEUX team will contract the selected experts to undertake a SOCIEUX activity on the basis of a standard contract. The contract will be signed either with the experts and/or with their employer. A formal confirmation of availability for the respective SOCIEUX Activity\(^2\) signed by the expert and his/her hierarchical superior needs to be annexed to the contract.

*The contract needs to be concluded before the implementation of an Activity starts and at least a scanned version has to be submitted to the SOCIEUX team before the Activity takes place. The originals should be sent by mail to address mentioned in the contract.*

#### 3.2. Financial compensation

A **FAA** (Fixed additional allowance) of EUR 250 is granted per working day and effective travel day to the following categories of experts contracted to undertake SOCIEUX Activities: experts from public administrations and mandated bodies of EU Member States and partner countries (including retired staff), international organisations, academia and civil society.

Experts mobilised to Partner countries where the weekly working days are Sunday to Thursday are entitled to receive a FAA for Sunday, only if required to work on that day.

Experts belonging to the staff of the partner institutions in the partner countries receiving SOCIEUX assistance in the form of an Action/Activity are in principle not entitled to financial allowances.

**Private consultants contracted to undertake SOCIEUX activities are entitled to receive a Fee per working and effective travel day.**

The time spent travelling can be considered as working time and can be included in the time-sheet and invoiced, if the Expert is travelling on a mission (including during weekends) outside the Expert’s place of posting and provided for by the Terms of Reference for Experts. The time spent travelling other than for a direct assignment (e.g. departure on Saturday, for an

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\(^2\) A SOCIEUX activity is a mission of 1-2 weeks which is part of a longer Action consisting generally of several activities. In certain cases, an Action could have only one punctual Activity.
assignment on Monday) is not considered as working time and shall not be invoiced unless it can be demonstrated that it is the most economical option.

For preparation of the Activity all Experts are entitled to get paid one home working day for each two days worked on mission at the location of the Activity abroad. The maximum number of paid home working days is three home working days in total for preparation. For reporting purposes after finalization of the Activity the Expert is entitled to receive compensation for half a home working day. For issuing the final evaluation report of an Action with several activities one home working day for reporting purposes is paid.

3.3. Per diems

Experts contracted under the SOCIEUX programme who need to travel abroad in order to undertake a SOCIEUX action are entitled to receive a per diem for each overnight spent outside their normal place of posting, most often in a partner country. If an Activity does not require overnight stay, half the per diem is granted.

The per diem covers accommodation costs, meals, local travels and sundry expenses (like private telephone calls, minibar and other personal expenses) at the location and during the period of the Activity.

The exact per diem rate will be fixed in the contract. Any per diem to be paid for an Activity undertaken as part of this contract must not exceed the per diem rates published on the Web site: http://ec.europa.eu/europeaid/work/procedures/index_en.htm.

The per diems will be paid as lump sum, without evidence of actual costs, on the basis of the travel schedule and justified by boarding passes or other additional documents for missions not requiring travel by air.

3.4. Payment procedures

The per diems are paid before the start of the Activity as an advance payment after receipt of the signed contract (scan version).

The allowances: FAQs / Fees shall be paid to the bank account indicated by the Expert and/or the EU Member State public administration within 10 working days after receipt of the original signed contract (standard contract), submission of a proper invoice and approval of the Expert Mission’s report.

The recipient of the payments will bear his/her own banking fees.

Due to accounting reasons all payments made in advance have to be included in the invoice issued by the Expert/EU Member State public administration and have to be deducted from the total amount to be paid.

3.5. International Travel

Experts attending an Activity abroad are entitled to have their international travel arranged and paid for. Flight tickets are booked on the basis of an economy class ticket, the boarding passes have to be kept and submitted to the SOCIEUX team in original.

In case an airline charges extra costs for Activity-related checked-in luggage (e.g. training materials), the corresponding amount can, with prior agreement of the SOCIEUX team, be reimbursed to Experts with required justifications and supporting documents in original.

Cost for inter-city trips in the country where the Activity takes place as well as inter-city travel costs in the home country linked to international travel will be reimbursed upon submission of a proper invoice and supporting documents as outlined below.
Experts who need to travel to the airport longer than 24 hours are entitled to receive a corresponding per diem to cover their travelling and accommodation costs to and from the international airport.

In case of use of train or boat transport, a "first class" ticket shall be reimbursed, except for high speed train services such as TGV, Thalys, Eurostar etc. where the booking should be done for "second class". For high speed trains also “first class” tickets may be reimbursed, if proof is provided that this option is more economical than “second class”. Premium tickets may be used if cheaper than "first class".

Taxi fares linked to international travel may be reimbursed to Experts in addition to the per diem only in the following cases:
- For a journey to and from the airport, if no public transport is available;
- For flights leaving before 9 a.m. and arriving before 7 a.m. or after 10 p.m.;
- For trains leaving before 8 a.m. and arriving after 10 p.m.

3.6. Accommodation
The Experts are provided with suggestions for hotels, the booking and payment should be done by the Expert him/herself. In case of booking of a hotel by the SOCIEUX team on the basis of a specific arrangement with the Expert, payment of hotel costs on the spot should nevertheless be done by the Expert. Only in exceptional cases the booking and payment of the hotel is operated by the SOCIEUX team. In the latter case, the accommodation costs have to be deducted from the per diems.

3.7. Visa
Experts who may need visa are responsible for obtaining it themselves. The SOCIEUX team will however assist the Expert(s) by providing useful information regarding the visa procedures and by intermediating the preparation and delivery of an invitation letter by the partner institution. Visa costs will be reimbursed to the Expert(s) upon request and provision of an invoice.

3.8. Insurance and vaccinations
The insurance for Experts carrying out a SOCIEUX Activity abroad is provided and covered by the programme in addition to the per diem. The insurance is valid for the whole duration of the mission including the travel and it covers:
- International health insurance- unlimited (medical treatment, pharmacy services, patient transport)
- Accident insurance:
  - Disability (up to a maximum of EUR 460,000)
  - Return transportation costs (up to a maximum of EUR 100,000)
  - Salvage costs (up to a maximum of EUR 25,000)
  - Subsidy for health resort treatment (up to a maximum of EUR 25,000)
  - Cosmetic surgery (up to a maximum of EUR 25,000)
  - Daily allowance in case of coma (up to a maximum of EUR 200/day up to two years)
  - Daily allowance in case of hospitalization (up to a maximum of EUR 50/day)
  - Assistance services (medical and travel assistance)
- Travel insurance:
  - Travel cancellation (up to a maximum of EUR 5,000)
  - Delayed means of transportation > 4 hours (up to a maximum of EUR 350)
  - Delayed luggage > 4 hours (up to a maximum of EUR 300)
  - Lost luggage > 48 hours (up to a maximum of EUR 1,500)
Upon request the detailed insurance terms and conditions can be sent to Experts for information.

Experts need to take care themselves of vaccinations necessary for the travel and during the mission. The costs for vaccinations specifically required for an Activity will be reimbursed to the Expert(s) upon request and provision of an invoice.

3.9. Reimbursement of costs
Costs related to participation in an Activity can only be reimbursed upon receipt of a proper invoice and required supporting documents.

For the reimbursement of travel costs the original tickets, boarding passes and other supporting documents shall be sent along with the invoice.

Any expenses incurred in another currency shall be reimbursed at the exchange rate specified in INFOREURO (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_de.cfm) which is published monthly by EuropeAid.