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EU Expertise on Social Protection,  
Labour and Employment

## Mid-Term Evaluation – Terms of Reference

European Union Contribution Agreement NDICI CHALLENGE/2023/449-355:  
“Extension of the EU Expert Facility on Employment, Labour and Social Protection  
(SOCIEUX +)”

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## List of abbreviations

Abbreviation	Description
<b>AFE</b>	Action Evaluation Form
<b>AM</b>	Action Manager
<b>APO</b>	Associate Project Officer
<b>BM</b>	Backoffice Manager
<b>CI</b>	Collaborative Institution
<b>CO</b>	Coordinator of Operations
<b>COM</b>	Communication Officer
<b>CSDD</b>	Directive on Corporate Sustainability Due Diligence
<b>DAC</b>	Development Assistance Committee
<b>DCI</b>	Digital Convergence Initiative
<b>DoA</b>	Description of the Action
<b>DG</b>	Directorate-General
<b>DG INTPA</b>	Directorate-General for International Partnerships
<b>DG ENEST</b>	Directorate-General for Enlargement and the Eastern Neighbourhood
<b>DG MENA</b>	Directorate-General for the Middle East, North Africa and the Gulf
<b>DTA-SP</b>	Development and Technical Expert on Social Protection
<b>DTA-LE</b>	Development and Technical Expert on Labour & Employment
<b>DTL</b>	Deputy Team Leader
<b>EC</b>	European Commission
<b>EF</b>	Expertise France
<b>EU</b>	European Union
<b>EUD</b>	EU Delegation
<b>ESAP</b>	Employment and Social Affairs Platform
<b>FIAP</b>	Fundación para la Internalización de las Administraciones Públicas
<b>FMT</b>	Facility Management Team
<b>GG</b>	Global Gateway
<b>ILO</b>	International Labour Organization
<b>IPA</b>	Instrument for Pre-accession Assistance
<b>KD</b>	Knowledge Development
<b>KDE</b>	Knowledge Development Expert
<b>KDMEO</b>	Monitoring & Evaluation and Knowledge Development Officer
<b>KDO</b>	Knowledge Development Officer
<b>M&amp;E</b>	Monitoring and Evaluation
<b>MEKDC</b>	Monitoring & Evaluation and Knowledge Development Coordinator

Abbreviation	Description
<b>MS</b>	Member States
<b>MTE</b>	Mid-Term Evaluation
<b>NDICI</b>	Neighbourhood, Development and International Cooperation Instrument
<b>OECD</b>	Organisation for Economic Co-operation and Development's
<b>PC</b>	Partner Countries
<b>PI</b>	Partner Institution
<b>PO</b>	Programme Officer
<b>PMT</b>	Programme Management Tool
<b>PSC</b>	Project Steering Committee
<b>ROM</b>	Results-Oriented Monitoring
<b>SDG</b>	Sustainable Development Goals
<b>SDR</b>	SOCIEUX+ Programme Director
<b>SOP</b>	Standard Operating Procedures
<b>TAIEX</b>	Technical Assistance and Information Exchange
<b>TL</b>	Team Leader
<b>ToR</b>	Terms of Reference
<b>USP</b>	Universal Social Protection
<b>VET</b>	Vocational education and training

## Project synopsis

<b>Contribution Agreement</b>	DCI-HUM/2020/414-477
<b>Duration of the action</b>	48 months
<b>Notification</b>	July 9th, 2020
<b>Objectives of the action</b>	<p><b>General objective:</b> To expand and improve access to better employment opportunities and inclusive social protection systems in partner countries.</p> <p><b>Specific objective:</b> To support partner countries in developing employment and social protection policies, strategies and systems that are more inclusive, effective, and sustainable.</p>
<b>Stakeholders</b>	<ul style="list-style-type: none"> <li>• EU Member States in particular through the mobilisation of their experts from their employment, labour and social administrations and from their social protection agencies.</li> <li>• Other experts from partner countries, civil society, private sector, social partners and academic institutions when necessary or relevant.</li> <li>• European Commission, especially the Regional Sectoral Policy Analysis units (RESPAs) and European External Action Service, including geographic services, especially the EU Delegations.</li> </ul>
<b>Target group(s)</b>	Public authorities and mandated bodies at national, regional and local levels in the beneficiary countries with responsibilities in the fields of labour, employment and social protection: central governments, ministries, government bodies, mandated bodies implementing social policies, including social protection agencies, public employment services, labour inspectorates, local or regional authorities in charge of the provision of employment and social services, social partners (employers' and workers' organisations)
<b>Final beneficiaries</b>	Those who are facing social problems, risk of social exclusion and poverty, people who have limited access or no access to social protection and to income generating activities or employment in the formal and informal sectors in partner countries. Since women are more at risk in terms of discriminations, decent work deficits, poor access to labour markets and poor social protection coverage, the inclusion of gender related issues will be promoted as major objectives of the assistance. A particular focus will also be given to groups in vulnerable situations including persons living with disabilities, the elderly, migrants or displaced workers, and those working under unacceptable forms of work.
<b>Expected results</b>	<ol style="list-style-type: none"> <li>1. Institutional capacities of employment, labour and social protection institutions are strengthened and reinforced.</li> <li>2. Enhanced public capacities for improving access to employment and social protection to groups in poverty and vulnerable situations.</li> <li>3. Awareness and knowledge on social protection and decent work is increased.</li> </ol>
<b>Main activities</b>	<ul style="list-style-type: none"> <li>• Implementation of demand-driven actions, providing an adapted expertise and short-term peer-to-peer cooperation measures between experts from EU Member States and their peers in EU Partner Countries and triangular-technical-North-South-South cooperation.</li> <li>• Development and implementation of a business development strategy to increase the awareness on peer-to-peer cooperation approach supported by SOCIEUX+ towards institutionalisation of the approach.</li> </ul>

- Generation of knowledge development (KD) products strategy to enhance knowledge among different stakeholders, to illustrate the use of best practices and identification of good practices arising the peer-to-peer cooperation activities.
- Strengthening of the existing Monitoring and Evaluation (M&E) system to demonstrate the effects and feed in KD measures of the Facility.
- Strengthening of the existing communication strategy to support awareness raising on SOCIEUX+, it's approach, effects and strategic development.



# 1. Background

## 1.1. Purpose of these terms of reference

The present terms of reference are intended at presenting the background and expected consulting services for the Mid-Term Evaluation (MTE) of the EU-co-funded technical assistance facility SOCIEUX+, EU Expert Facility on Employment, Labour and Social Protection.

The first section of this document presents a birds-eye-view background of “SOCIEUX+ EU Expert Facility on Employment, Labour and Social Protection” (hereafter referred to as: SOCIEUX+, or, the Facility). This is followed by a more detailed overview of the Facility and its structures, in Section 2.

A description of the assignment to be commissioned is provided in Section 3. This includes a succinct rationale (overall and specific objectives) for the proposed MTE from the point of view of the main funding agency (The European Commission through relevant Directorates General, namely the Directorate-General for International Partnerships – DG INTPA, the Directorate-General for Enlargement and the Eastern Neighbourhood – DG ENEST and, the Directorate-General for the Middle East, North Africa and the Gulf – DG MENA), the Implementing Partners and the Facility Management Team (hereafter referred as “FMT”). It also outlines the expected deliverables, timeframe and general tasks to be further developed in technical proposal, to be submitted by interested consulting firms or consultants. Finally, the document summarises the profiles of expertise and estimated volume of work.

## 1.2. Employment, Labour and Social Protection in EU Development Cooperation

The current phase of SOCIEUX+ is implemented under the Global Europe: Neighbourhood, Development and International Cooperation Instrument (NDICI) Thematic Programme Global Challenges that sets out the global and multilateral dimension of implementation of EU’s political priorities and aims to strengthen the EU as a global actor, following the Commission’s geopolitical ambition of a ‘Stronger Europe in the World’<sup>1</sup>. It is one of the EU’s major tools for the delivery of the United Nations 2030 Agenda and the Paris Agreement to help eradicate poverty, reduce inequalities and achieve sustainable development with the implementation of the Sustainable Development Goals. It helps to put in place the Joint Communication on strengthening the EU’s contribution to rules-based multilateralism<sup>2</sup>. The Global Challenges programme complements and strengthens the country and regional dimensions of EU action to pursue and project EU’s interests and values in support of universal global agendas. Being a demand-driven technical assistance facility, SOCIEUX+ contributes to disseminating European expertise and values in the area of labour, employment and social protection. It acts at global level while complementing and strengthening the bilateral and regional EU development cooperation programmes with an on demand and short term, quickly operational support specifically tailored to the needs of the partner countries. Through the peer-to-peer approach, it builds trust and mutual learning between employment and social protection experts all around the world and offers opportunities for institutional partnerships. SOCIEUX+ contributes directly and indirectly to several SDGs, including the SDG 8 (decent work and economic growth), 1 (no poverty), 5 (gender equality), 10 (reduced inequalities) and 17 (partnerships for the goals).

Regarding the multilateral dimension, SOCIEUX+ responds to the International Labour Organization (ILO)’s June 2021 Global Call to Action for a human-centred recovery from the COVID-19 crisis that is inclusive, sustainable and resilient<sup>3</sup> and to the UN and ILO’s Global Accelerator on Jobs and Social Protection<sup>4</sup> to create 400 million jobs and extend social protection to 4 billion people currently without coverage.

<sup>1</sup> In particular, SOCIEUX+ contributes to the Specific objectives 1 ‘Investment climate, private sector, decent work, employment and trade’ and 4 ‘Global action to eradicate child labour’ under the priority area ‘Prosperity’ and to the Specific objective 6 ‘Social protection, inequality and inclusion’ under priority area ‘People’

<sup>2</sup> JOIN(2021)3 of 17.02.2021

<sup>3</sup> [https://www.ilo.org/wcmsp5/groups/public/---ed\\_norm/---relconf/documents/meetingdocument/wcms\\_806092.pdf](https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_806092.pdf) [Accessed 19 July 2023].

<sup>4</sup> [https://www.ilo.org/global/topics/coronavirus/impacts-and-responses/un/WCMS\\_837839/lang--en/index.htm#:~:text=The%20Global%20Accelerator%20on%20Jobs%20and%20Social%20Protection%20for%20Just,green%2C%20digital%20and%20care%20economies%2C](https://www.ilo.org/global/topics/coronavirus/impacts-and-responses/un/WCMS_837839/lang--en/index.htm#:~:text=The%20Global%20Accelerator%20on%20Jobs%20and%20Social%20Protection%20for%20Just,green%2C%20digital%20and%20care%20economies%2C) [Accessed 19 July 2023].

SOCIEUX + helps to put into practice the commitments of the 2017 European Consensus on Development in the area of employment and social protection. Namely, SOCIEUX + contributes to promote adequate and sustainable social protection and decent work for all, social dialogue, effective implementation of labour standards and due diligence requirements to ensure decent employment conditions and decent wages for workers in both formal and informal sector and to combat child labour and forced labour. In doing so, it also supports the objectives of the 2012 Communication on “Social Protection in European Union Development Cooperation”, subsequently endorsed by EU Member States’ Council on 15 October 2012, which stresses the importance of supporting the development of nationally-owned social protection policies and programmes, including the Social Protection floors ‘initiative, in support of inclusive development.

The action works on fostering the social dimension of the green and digital transitions, by reinforcing the concept of “just transitions” and building on its potential, while mitigating its risks and negative effects on the most vulnerable. The action is also instrumental in providing the EU contribution to Global Partnership for Universal Social Protection 2030 (USP 2030)<sup>5</sup>. SOCIEUX+ will further provide support to help address the requirements of the forthcoming Directive on Corporate Sustainability Due Diligence (CSDD). It can support partner countries’ legal and policy systems in order to build enabling frameworks to assist local businesses in adopting socially sustainable production patterns.

The action contributes as well to the Gender Action Plan III<sup>6</sup> with gender mainstreaming applied in all its actions. It thus addresses the commitment of the 2017 Consensus to “focus on concrete actions to meet the specific needs of youth, particularly young women and girls, by increasing quality employment and entrepreneurship opportunities,”. SOCIEUX+ applies the Human Rights–Based Approach thus promoting the application of human and labour rights. It also plays a role in implementing the European Green Deal through the work on green jobs and supporting labour market shifts in line with societal transformations along a low-carbon and climate resilient pathway. The Facility can further be instrumental in achieving the ambition of the Global Gateway Initiative for its projects to achieve the highest labour standards.

## 2. Overview of SOCIEUX+

SOCIEUX+ is a technical assistance facility set-up and co-funded by the EU (through DG INTPA, DG ENEST and DG MENA), France, Spain and Belgium. The Facility is operated by a partnership composed of five members (hereafter: “the Implementing Partners”): Expertise France, leader of the Implementation Partnership, France Travail, Fundación para la Internalización de las Administraciones Públicas (FIAP), the Belgian Federal Public Service for Social Security and Belgian Development Agency (Enabel).

The **general objective** of SOCIEUX+ is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries.

The **specific objective** is to support partner countries in developing employment and social protection policies, strategies and systems that are more inclusive, effective and sustainable.

SOCIEUX+ supports the efforts of Partner Countries (PCs – the list of eligible countries is provided in Annexe A) of the EU in the reform, development and extension of their social protection systems and the strengthening of labour & employment policies. The Facility aims at enhancing the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable labour and employment strategies and social protection systems through peer-to-peer short-term technical assistance and knowledge development. Additionally, from this current phase, SOCIEUX+ will also support actions that help address the requirements of the Directive on Corporate Sustainability Due Diligence (CSDD). For example, it can support partner countries’ legal and policy systems in order to build enabling frameworks to assist local businesses in adopting socially sustainable production patterns. The establishment of SOCIEUX+ therefore asserts the position of its Implementing Partners and of the EC relevant DGs in:

- Recognising the impact of social protection and employment in reducing poverty and vulnerability;
- Supporting the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems;
- Complementing the efforts made through other European Union initiatives.

<sup>5</sup> The USP2030 is a multi-stakeholder Partnership, launched in 2016, that brings together governments, international and regional organisations, civil society organisations, social partners and other organisations. USP2030 is co-chaired by the International Labour Organization (ILO) and the World Bank.

<sup>6</sup> JOIN(2020)17 of 25.11.2020

SOCIEUX+ aspires to drive the political agenda at PC level with regards to its scope of work and privileges actions that contribute to:

- Advocacy for increased spending in the areas of SOCIEUX+ scope of work;
- Institutional strengthening; and,
- Regulatory and policy reforms.

Cross-cutting issues are duly considered in the assessment of request, design and implementation of actions. These include but are not limited to good governance and democracy, the promotion of human rights, gender equality, non-discrimination, children's rights, and rights of persons with disabilities.

SOCIEUX+ is currently in its fourth Phase: Phase 1 established in April 2013 on social protection; Phase 2 initiated in 2016 to address social protection and labour & employment, as well as the development of global knowledge on both fields, and comes to its end in September 2020; and Phase III which started in July 2020, with an initial planned end date of July 2024. It was subsequently extended, at no additional cost, until the end of December 2025 in order to finalise the Western Balkans top-up, which was signed in October 2022.

The fourth phase of SOCIEUX+, to which these terms of reference refer to, started in January 2024 with the aim to allow the Facility to respond to the increasing demands from PCs, while at the same time stepping up strategic coordination with European geographic and thematic actions, in close partnership with Regional Sector Policy Analysis units and EU Delegations, in order to target specific priority countries, among which middle-income countries.

## 2.1. Scope of work

SOCIEUX+ makes European public expertise quickly available with minimal transaction costs for partner institutions. It draws on the expertise of public or mandated bodies, non-governmental organisations, and relevant civil-society organisations of EU Member States and international specialised organisations. In particular cases, it can also support triangular cooperation through the mobilisation of practitioners from partner countries in collaboration with EU public expertise, in the framework of triangular technical assistance activities.

The role of SOCIEUX+ as a technical assistance facility differs substantially from what is understood as “classical” cooperation programmes. The latter have narrow target groups and predefined goals, objectives and results associated with those groups. Implementation plans can be derived from these, and own programmes’ resources aim at delivering expected results. A technical assistance facility, by contrast, is demand-driven, in the most literal sense, as requests are processed on an ad hoc manner as their origin and scope cannot be foreseen. A facility even fosters in its communication activities at broadening the geographic, type or requests and partners with which it works. The implementation of packets of work (activities) does not rely on the own resources of the Facility. SOCIEUX+ instead matches the demand of eligible institutions from partner countries with appropriate European expertise. The mechanisms of a technical facility should ensure a flexible mobilisation of expertise. The portfolio of requests and actions supported by SOCIEUX+ would be highly diversified on these premises. Diversity, in fact, reflects the success of SOCIEUX+ as a demand-driven, flexible and versatile technical assistance facility.

SOCIEUX+, by design, does not have the technical resources to design, plan or implement on its own large-scale cooperation programmes at country level. Thus, the sustainability of an action requires ownership by partner institutions. Implemented actions are independent micro-projects, for which objectives, results and deliverables are set by requesting organisations in partner countries. These should still be encompassed in the objectives of SOCIEUX+, but they remain very contextualised.

The reliance on a pure peer-to-peer approach between public experts is at the same time a strength and weakness (risk) inherent to the design of a facility such as SOCIEUX+. Thus, the successful implementation of an action depends on the individual experts mobilised, who are not employees or dedicated members of the implementation team or structures of SOCIEUX+.

### 2.1.1. Areas of work

The core business of SOCIEUX+ lies in the formulation, organisation, implementation and follow-up of micro-projects’ activities. However, with the transition from SOCIEUX to SOCIEUX+, a new component was included on Knowledge Development. This component extends the activities of SOCIEUX+ to the analysis, development and exchange of knowledge related to social protection, labour and employment. For the fourth phase of SOCIEUX+, the component was further strengthened and a corresponding updated strategy developed to guide the

implementation of this component.

The areas of work of SOCIEUX+ include broad horizontal and vertical dimensions of social protection, labour & employment. The areas of assistance categorised according to the International Labour Organisation Taxonomy (<http://www.ilo.org/inform/online-information-resources/terminology/taxonomy/lang--en/index.htm>) to ensure consistency in the classification and reporting of requests and actions statistics (and indicators). These dimensions enable a detailed classification and subsequent classification of requests to identify recurrent themes.

In addition, requests and actions are also classified using, Sustainable Development Goals (SDGs), gender relevance and disability relevance. These multiple classifications are for reporting purposes only.

### **2.1.1.1. Labour and employment**

SOCIEUX+ focuses its efforts in the area of labour and employment on supporting eligible partner institutions in ministries of labour and related agencies in low and middle-income countries which face serious challenges in the design and implementation of effective employment strategies and labour market policies. These include:

- Comprehensive employment strategies across the 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 and 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;
- Green jobs and supporting labour market shifts in line with the green transition;
- Working conditions including occupational health and safety issues;
- Nonstandard forms of employment; and,
- Social dialogue.

For this phase, SOCIEUX+ will also support actions that help address the requirements of the Directive on CSDD. This will build on and extend the existing experience of the facility in facilitating Actions that strengthen public-private partnerships around sustainable business practices, as well as in evidence generation and social dialogue to address issues faced by workers in the informal economy.

### **2.1.1.2. Social protection**

SOCIEUX+ addresses main challenges in PCs on the design and operationalisation of social protection systems and programmes that have better and more targeted coverage, more equitable and inclusive, efficient, appropriate, and fiscally feasible and sustainable. The Facility favours support to eligible PIs in low and middle-income countries. Such support covers, but is not limited to:

#### *Interventions*

- Legal and institutional framework 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 and cross-sectorial policies and issues related to social protection;
- Advocacy and capacity building for sustainability of domestically funded social protection systems and programmes; and
- Empowering of civil society and social partners on social protection.

### Themes

- Technical assistance 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.);
- Portability of social benefits and rights at national and regional levels;
- Social protection coverage and targeting measures; inclusion of migrant workers, employed informally or in atypical form of work;
- 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 deinstitutionalization process;
- Capacity building for social workers and professionalization of social protection staff;
- Poverty reduction policies and methods; and
- Human right-based disability assessment and transition to community-based services.

## 2.1.2. Actions and activities

### 2.1.2.1. Principles

SOCIEUX+ actions are micro-projects implemented through short-term technical assistance interventions. These actions take the form of a single or several short-term activities addressing needs and/or shortcomings on the areas covered by the SOCIEUX+ scope of work as described in the previous section. All actions and their activities are based on the principles of:

- Ownership – requests and actions are driven by the demand and needs of PIs;
- Peer-to-peer dimension – implemented activities are based on peer-to-peer approaches between institutions, experts and practitioners;
- Public expertise preference – mobilised experts are mainly from public or mandated EU Member States' ministries, agencies and authorized service providers;
- Diversification of expertise – mobilised expert and collaborative institutions providing expertise are as far as possible from more than one country;
- Institutional collaboration – actions should foster institutional cooperation between EU Member States and PCs institutions;
- Structured approach – activities of structural action (with more than one activity) are articulated to achieve the specific objectives of the action;
- Gender and Rights Based Approach – the formulation and implementation of activities should proactively integrate a human-right based approach and a gender perspective;
- Triangular technical assistance – actions and activities that mobilise experts from PCs and EU Member States (to some extent triangular cooperation can be promoted through this approach);
- No-overlap and complementarity – actions should not overlap but complement and create synergies with existing cooperation programmes financed by the EU or other relevant international partners;
- Results-oriented management – actions/ activities are defined in a way that tangible results are obtained and pave the way to further achievements. This also allows a management of activities.; and,
- High quality – deliverables of activities meet high standards of quality but still under cost-effectivity constraints.

### 2.1.2.2. Type of actions

Actions can address structural or institutional shortcomings or be *ad hoc* know-how and technical assistance to strengthen existing capacities or respond to punctual needs. Possible types of actions include:

- Gaps and needs assessment for capacity building;

- Design of capacity building and development measures;
- Sector and functional analysis (and recommendations);
- Systems 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 specific objectives of SOCIEUX+.

No financing or purchasing of equipment or infrastructures is possible in the framework of SOCIEUX+. The overall objective, specific objectives, expected results, implementation methodology and work-plan for an action are set in a participative process between the FMT and the PI.

### **2.1.2.3. Type of activities**

An action consists in either one or a series of activities (up to a maximum of 4 activities excluding fact-finding missions). The overall objective, specific objectives, expected results, deliverables, implementation methodology and work plan for an action are set in a participative process between the FMT and the PI.

Activities are generally implemented through technical assistance missions onsite, although they can be replaced or complemented by distance-support. The activities take different forms including:

- Expert advice and consulting on specific technical issues;
- Screening and reviews of documents/programmes;
- Expert support in drafting legislation/strategies;
- “Train-the-trainers” seminars;
- Technical trainings;
- Roundtable discussions;
- Thematic workshops; and,
- Any other type of measure that can be provided through a short-term peer-to-peer exchange.

Onsite activities are implemented through short-term missions of one to three weeks carried out in general by a team of two mobilised experts. Expected deliverables of each mission and activity are agreed between the FMT and the PI. The implementation of activities is monitored by SOCIEUX+ coordination of operations. The EU Delegation (EUD) in the partner country/ relevant Instrument for Pre-accession Assistance (IPA) beneficiaries, as well as the relevant EC DGs, might support and/or participate in a mission when appropriate. Actions may also be partly implemented via study visits (one of the activities) to provide practical and operational knowledge and experience on the set up of social infrastructure in EU member states. This type of exercise can also help to establish and support institutional collaborations in line with the principles of SOCIEUX+ set out above.

Online activities such as trainings are implemented through SOCIEUX+ e-learning platform (<http://elearning.socieux.eu/>) where the experts create personalised interactive courses for each activity and monitor participation. In some cases, the e-learning platform supports the deployment of onside training activities too (hybrid activities).

Financial support to the production of materials or logistics of workshops other than on Knowledge Development measures was excluded from the type of activities that SOCIEUX+ and the FMT can support. Also, the support to study visits is limited to the identification of host institutions and to the minimum financial and logistics support, in the form of airfares and full per diems.

Triangular cooperation may be fostered in the framework of SOCIEUX+ actions. Triangular technical assistance, where regional or non-EU experts are teamed with EU public experts, can be implemented when it is of added value or essential to accommodate particular contexts of the PC or PI.



## 2.1.3. Eligibility

### 2.1.3.1. Partner countries (geographical scope)

Countries from the following regions covered by the NDICI Global Europe<sup>7</sup> and IPA III<sup>8</sup> are identified as potential beneficiaries:

- Latin America and the Caribbean, Asia (including Central Asia) and the Middle East;
- African, and Pacific Countries; and
- European Neighbourhood Countries.

The extension of the project allows the Facility to respond to the increasing demands coming from these regions, while at the same time stepping up strategic coordination with geographic and thematic actions through increased coordination within DG INTPA, DG ENEST, DG MENA and with the EU Delegations.

### 2.1.3.2. Partner institutions (institutional scope)

SOCIEUX+ mainly targets public authorities and mandated bodies at national, regional and local levels in the beneficiary countries with responsibilities in the fields of labour, employment and social protection. The following types of institutions are concerned: central and local governments, ministries, government bodies, mandated bodies implementing social policies, including social protection agencies, public employment services, labour inspectorates, etc. The target groups of beneficiaries consist of the staff of these institutions.

Social partners (employers' and workers' organizations) involved in formal social dialogue also constitute important stakeholders and the engagement of CSOs/NGOs advocating for women's rights, informal workers, youth and people with disabilities and for the most socio-economically disadvantaged groups is promoted.

## 2.2. Management and governance

### 2.2.1. Facility Management Team

The Facility Management Team (FMT) is responsible for the daily management and implementation of SOCIEUX+. The FMT is responsible for the entire project cycle of actions from the reception and assessment of requests to their formulation, approval, preparation, implementation and monitoring & evaluation (excluding external evaluation). The FMT is split between Paris, Brussels and Madrid. The team is composed of:

1. The SOCIEUX+ Programme Director (SDR), based in Paris, France;
2. The Team Leader (TL), based in Paris, France;
3. The Deputy Team Leader (DTL), based in Paris;
4. The Programme Officer (PO), based in Madrid;
5. The Coordinator of Operations (CO), based in Brussels;
6. The Monitoring & Evaluation and Knowledge Development Coordinator (MEKDC), based in Brussels;
7. The Monitoring & Evaluation and Knowledge Development Officer (KDMEO), based in Brussels;
8. The Knowledge Development Expert (KDE), based in Brussels;
9. The Knowledge Development Officer (KDO), based in Brussels;
10. The Development and Technical Expert on Social Protection (DTA-SP), based in Brussels;
11. The Development and Technical Expert on Labour & Employment (DTA-LE), based in Paris;
12. The six Action Managers (AM);

<sup>7</sup> REGULATION (EU) 2021/947 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

of 9 June 2021 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, amending and repealing Decision No 466/2014/EU and repealing Regulation (EU) 2017/1601 and Council Regulation (EC, Euratom) No 480/2009

<sup>8</sup> REGULATION (EU) 2021/1529 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 15 September 2021 establishing the Instrument for Pre-Accession assistance (IPA III) [https://neighbourhood-enlargement.ec.europa.eu/countries\\_en](https://neighbourhood-enlargement.ec.europa.eu/countries_en)

13. The two Associate Project Officers (APO), based in Paris and Madrid;
14. The Associate Programme Officer (APO) for Knowledge Development and E-Learning Manager, based in Brussels;
15. The Backoffice Manager (BM), based in Paris;
16. The Communication Officer (COM), based in Brussels.

### 2.2.2. Steering Committee

The SOCIEUX+ Project Steering Committee (PSC) is the governing body of the Facility. The PSC areas of decision-making relate to the overall steering and strategic guidance. The PSC ensures close cooperation between the FMT, the Partnership members and EC relevant services. It provides a forum for discussion and decision-making on the inputs and outputs of the Facility. Its contributions and decisions ascertain the high-level commitment of all stakeholders to the achievement of SOCIEUX+ objectives and its smooth implementation.

The PSC is chaired by DG INTPA and co-chaired by EF. The PSC members are classified into voting and non-voting members. The PSC meets in principle every 6 months.

## 2.3. Information management

### 2.3.1. Programme Management Tool

SOCIEUX+ Programme Management Tool (PMT) is a web-based database which serves among others to:

- Store non-sensitive documents such as actions documentation, deliverables and evaluations;
- Enable the registration of interested experts;
- Storage and manage personal and business information of experts (including curriculum vitae), contacts and focal points;
- Submission of requests by interested institutions in PCs;
- Storage and extraction of data for reporting and indicators calculation; and
- Monitor the overall progress of actions.

The data stored in the PMT is the main source for statistics and quantitative reporting of the Facility on performance indicators set under the Agreement, such as number of actions by status, number of expert working days, etc.

### 2.3.2. Data repository (shared folders)

A secured shared folder is only accessible and managed by the FMT through the Microsoft SharePoint account of the Belgian Federal Public Service for Social Security. This folder is used for the storage of all relevant documentation of SOCIEUX+ and in particular sensitive documentation such as electronic copies of contracts with experts, suppliers and others. Data on the shared folder is managed in line with the Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation)

## 2.4. Standard Operating Procedures

Being a demand-driven facility, SOCIEUX+ needs clear and efficient processes and procedures. The Standard Operating Procedures of SOCIEUX+ describe and regulate the processing and management of requests and actions. They are based on the business processes developed at the beginning of the existing phase of SOCIEUX+ and regularly updated as lessons on the processing of requests and implementation of actions are gained. The overall project cycle of actions is guided by these business processes and best practices as set under the European Commission Aid Delivery Methods – Project Cycle Management Guidelines. The project cycle complements SOCIEUX+ knowledge development approach to contribute to the overall and specific objectives of the Facility. The manual of Standard Operating Procedures (hereafter: “the SOP Manual”) of



SOCIEUX+ provides the FMT and Partnership members with guidance and regulation for the implementation of SOCIEUX+ specifically for the processing of operations associated to the delivery of short-term technical cooperation action.

A review of the SOP Manual and the business processes was recently conducted during the Inception phase, in order to take into account the reorganisation of the FMT and new roles of Implementing Partners to maintain the efficiency of SOCIEUX+, and to ensure the SOP is fully aligned with the Implementing Partners own rules.

## 2.5. SOCIEUX+ in numbers

Under SOCIEUX, the first request for technical assistance was received in January 2014. Till today, in January 2026, 398 requests had been received from 91 partner countries. So far, the FMT has supported the implementation of 685 activities/missions with 21,779 days of expertise provided to PIs. The majority of requests, missions and days of expertise processed relate to countries from middle income countries. From the time of the beginning of this phase of SOCIEUX+ only (01 July 2024) SOCIEUX+ implemented/is implementing 51 actions, benefitting 47 partner institutions in 27 partner countries. 33 of these actions related to Labour and Employment and 18 to Social Protection.

A substantial share of the total number of requests received (91%) deals with Capacity Building, divided into Institutional Capacity, Organizational and Individual Capacity Building. A minority of requests (9%) are related to Awareness Raising. As per the International Labour Organization Taxonomy, Work is a field of intervention in 33.4% and Social Protection in 45.7% of the requests submitted.

### 2.5.1. Collaborative institutions

SOCIEUX+ also relies for the mobilisation of expertise on European institutions identified as the most appropriate to provide technical expertise for the needs of an action. Such a *Collaborative Institution (CI)* may have been proposed based on:

- Its nature as centre of excellence in the area of expertise;
- The expressed interest of the institution to build long-term cooperation with the PI; and,
- The potential of creating intra-European collaboration to foster transfer of expertise towards PCs.

The collaboration between SOCIEUX+ and CIs may be formalised by a Collaboration Agreement that does in no case bind SOCIEUX+ to the exclusive reliance on the CI for the implementation of a specific action or actions in general. Such an Agreement does not consist of a framework-like contract that would guarantee in any form the CI to a minimum number or expert or expert-working-days mobilisation. It does however outline the conditions under which the CI makes its experts available for SOCIEUX+ activities.

### 2.5.2. Monitoring and evaluation

#### 2.5.2.1. Indicators

Indicators monitored in the implementation of the extension of SOCIEUX+ actions include (as per SOCIEUX+ Logframe - see Annexe B):

- Impact indicators:
  - Average proportion of population covered by social protection floors/systems in the partner countries (SDG 1.3.1).
  - Average proportion of informal employment in total employment in the partner countries (SDG Indicator 8.3.1).
- Outcome indicators:
  - Number of laws and/or government policies that have been adopted by the partner countries with EU support.
  - Percentage of partner institutions with competencies in the field of employment, labour and social protection that have implemented best practices and/or new management tools delivered through the intervention.
- Output indicators:

- Number of countries which have benefitted from EU support to strengthen their social protection systems (Matching GEF 2.31).
- Number of countries which have benefitted from EU support to strengthen their labour and employment systems and policies.
- Number of partner institutions that have developed and/or revised their public management tools (procedures, data basis, social services, etc.) in the field of employment, labour and social protection with the support of the intervention.
- Number of public managements tools (procedures, data basis, social services, etc.) that have been developed and/ or revised in the field of employment, labour and social protection with the support of the intervention.
- Number of partner institutions that have developed specific strategies and/or activities for assisting local stakeholders in applying the new Directive on Corporate Sustainability Due Diligence-CSDD with the support of the intervention.
- Number of specific strategies and /or activities for assisting local stakeholders in applying the new CSDD Directive developed with the support of the intervention.
- Number of regulatory adjustments and/or policy reforms that have been developed and/or revised with the support of the intervention in the area of labour, employment and social protection.
- Number of European institutions that have been actively involved in the peer-to-peer cooperation strategies implemented through the intervention to share experiences and best practices.
- Percentage of people, staff of the competent authorities and/or other key stakeholders who have improved their knowledge for the design and implementation of labour, employment and/or social protection strategies and services, including strategies and activities related to the new CSDD Directive.
- Number of knowledge tools that have been developed with the support of the intervention to increase the available information and the awareness on social protection, decent work and labour standards in the targeted countries.
- Number of European and partner countries' experts that have been involved in SOCIEUX+ networking activities to share knowledge and good practices on social protection, decent work and labour standards.
- Number of people who have received relevant information on social protection, decent work and labour standards and policies through the awareness-raising initiatives developed in coordination with the targeted countries.

To complement the indicators of the SOCIEUX+ current extension's logical framework, other key performance indicators are normally monitored, to provide an overview of the operation's workload, efficiency and allocation. Examples of KPIs include:

- The number of experts registered in SOCIEUX+ Project Management Tool;
- The number of experts mobilised in actions;
- The number of expert-days provided through actions;
- The number of focal points in EU Member States (EU MS);
- The median time between reception of request and their approval;
- The median time between reception of request and their rejection;
- The number of request received;
- The number of actions implemented (approved and completed); and,
- The level of satisfaction of PIs, mobilised experts and other institutions<sup>9</sup>.

Those indicators guide the FMT and Partnership in the result-based management of the processing of request and implementation of actions, and communication and awareness raising activities towards PIs, potential experts to mobilise and collaborative institutions.

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<sup>9</sup> Measured through Microsoft Form feedback questionnaires delivered after each activity.

### **2.5.2.2. Monitoring**

SOCIEUX+'s monitoring deals with three different levels of the Facility's operations: the overall Facility functioning and performance, Actions and Activities. Monitoring takes place at these three levels to make it possible to understand how each level is performing, which related outputs are being produced, and the status of the progress towards the achievement of the expected outcomes.

The monitoring of experts' activities and missions is under the SOCIEUX+ Action Managers (unless otherwise agreed with the thematic coordinator). He/she is in regular communication with mobilised experts at all stages of activities' preparation, implementation and finalisation (provision of deliverables). The Action Managers may recommend any appropriate and reasonable measure to secure results and deliverables of activities.

### **2.5.2.3. Evaluation of actions**

For the evaluation process of activities and actions, several tools and formats have been designed and adopted along with the life of SOCIEUX+, to better ensure the collection of quantitative and qualitative information, including complementary information of cross-cutting themes identified as relevant and for a proper reporting to key stakeholders.

Standard evaluation and feedback questionnaires are sent to relevant contact persons at the end of each activity. These questionnaires are simple forms that include scales of satisfaction on various dimensions of activities. They are standardised to enable monitoring of the satisfaction of SOCIEUX+'s "clients". The questionnaires are filled online, enabling so the collection and processing of data.

The FMT carries out a short-term final evaluation of each Action (through the Action Evaluation Form – AFE) based on information collected from feedback questionnaires, reports, deliverables and debriefings with stakeholders and experts. The assessment covers all relevant aspects, including results, logistics, organisation, finance, conclusions and recommendations.

In addition, SOCIEUX+ members are also interested in assessing the level of attainment of actions' results and objectives and the added value of SOCIEUX+ contribution to regulatory adjustments/policy reforms and/or to the organizational strengthening of the PIs, as defined in SOCIEUX+ Logical Framework. This, in order to inform about the results that SOCIEUX+ contributed to achieve towards the provision of technical assistance, accomplishing the results-oriented management approach. For such purpose, an ex-post evaluation strategy for SOCIEUX+ was developed, and includes ex-post feedback questionnaires, ex-post remote interviews and ex-post field missions of a sample of completed actions.

## 3. Description of the assignment

### 3.1. Overall objective

In line with best practices in project cycle management and in accordance with the commitments taken by the Implementing Partners of SOCIEUX+, a Mid-Term Evaluation is to be commissioned to independently assess the current state of implementation of the extension of SOCIEUX+, paying attention to the different levels of its intervention logic and to provide recommendations for improving current and potential future interventions (beyond December 2027).

The overall objective of the MTE is to:

*“Contribute to the success of the Facility by compiling key lessons and recommendations to guide all stakeholders of the Facility towards the achievement of the objectives and results formulated in the initial project document of the extension of SOCIEUX+ for the period 2024-2027 (four years).”*

To do so, the commissioned consulting MTE Team will:

- Assess the progress achieved by SOCIEUX+ to draw conclusions on the strengths and constraints of the SOCIEUX+ mechanism for enhancing social and employment policies in partner countries.
- Examine the added value and effectiveness of the SOCIEUX+ peer-to-peer cooperation model as a core feature of the Facility.
- Assess the contribution of SOCIEUX+ to the Global Gateway Agenda, including its alignment with Global Gateway principles (sustainability, values-driven partnerships, human development), its ability to support conducive employment framework conditions that support GG investment, and its potential to reinforce EU visibility and strategic positioning.
- Assess the effectiveness and efficiency of the current management structure in implementing the Facility.
- Assess what measures (short-term, non-structural) could be introduced in this phase of the project to improve the effectiveness of SOCIEUX+ and what more structural measures should be considered for future phases or to be integrated in similar mechanisms.
- Analyse the realized complementarities with other instruments– such as (non-exhaustive list) : Inclusive societies programme in LAC, TEI Sub-Saharan Africa social protection, Digital Convergence Initiative DCI, TAIEX and Twinning , Employment and Social Affairs Platform (ESAP 3; Western Balkans), other EU-ILO programs. The complementarity must be assessed within the current implementation period and forward looking in case the programme ends.
- Evaluate the methodologies used in monitoring the consistency of the implemented actions, namely at the level of the institutional memory acquired and how these results are retained and perpetuated in the future.
- Recommend how the contribution of SOCIEUX+ activities and interventions to wider reforms, can be better captured and analysed and contribute to knowledge development and quality improvements.
- Provide insights on the best way forward after the current phase, including both recommendations for an exit strategy and alternatively, the prospective design of a possible follow-on phase of SOCIEUX+.

### 3.2. Specific objectives

The specific objective of the evaluation is to provide the Implementing Partners and the EC with sufficient information to respond at least to the following question:

- 1) How far have the objectives and expected results of SOCIEUX+ been achieved?
- 2) How likely are the objectives of SOCIEUX+ to be achieved without changes in the current implementation?
- 3) To what extent SOCIEUX+ is complementary and can work in synergy with other programs and strategies on the same thematic domain (such as those mentioned above)?
- 4) Are there changes that can be made to the current implementation plan and structure to achieve the

objectives and results set for SOCIEUX+?

- 5) Are there any changes that can be made to the final targets of the SOCIEUX+ logframe indicators to better reflect the current volume of work and the implementation capacity of the Facility for the remaining two years of the contract?
- 6) Does the governance mechanism of the intervention allow for a suitable and efficient representation of the interests of key stakeholders?
- 7) How effectively is the Knowledge Development (KD) component encouraging attention to relevant topics and promoting the dissemination and uptake of lessons learned and good practices among key stakeholders and the broader sector?

### 3.3. Methodology

*This section outlines the main guiding principles for the MTE. The consultants shall base their technical proposal on these. The proposal should demonstrate their understanding and professional approach to the needs of the target audience of their final product (here understood as the Implementing Partners of SOCIEUX+ and the relevant EC DGs). The selection of the type of evaluation is crucial and directly impacts the methodological approach and the selection of Evaluation Questions, as set below.*

#### 3.3.1. General principles

The MTE will cover the implementation of the extension of SOCIEUX+ since January 2024, including the transition of activities from the previous phase<sup>10</sup>. The MTE team will base their assessment of the current stage of implementation and success of SOCIEUX+ on a review of the indicators of the logical framework developed for the Facility for its extension (see Annexe B). This logframe remains a main reporting framework and assesses the delivery of the Implementing Partners and FMT. Considerations in the use of the logframe shall apply.

The commissioned consultants will have to consider the implementation, effect and likely outcomes of individual actions supported by SOCIEUX+, taking into account the particularities of the design and nature of SOCIEUX+ as technical assistance facility (see Section 2.1).

By explaining why progress is happening or is not happening as planned, recommendations for improvements of the current implementation of SOCIEUX+ shall be made considering the timeframe of the Facility's funding, i.e. it should be possible to integrate in the short-term. Furthermore, any medium-term recommendations shall be considered as possible design options for a follow-on phase of an EU-funded technical assistance facility on social protection, employment and labour. Lessons learned for similar development cooperation instruments financed through the EC should be underlined too.

The MTE will follow the six evaluation criteria endorsed by the Organisation for Economic Co-operation and Development's-Development Assistance Committee (OECD-DAC): relevance, coherence, effectiveness, efficiency, sustainability and impact<sup>11</sup>. The consultants will also evaluate the implementation of SOCIEUX+ according to the specific criterium for development programmes financed through the EU, namely the EU added value.

The MTE team shall also consider the results of the Results-Oriented Monitoring (ROM) conducted by an independent consulting team commissioned directly by DG INTPA in 2023. It should however be noted and well considered that the ROM exercise differs in its scope output format from what is expected as a product of the MTE. The MTE team shall also take in account the key conclusions of the MTE of the previous phase of SOCIEUX+, conducted by external consultants between August and November 2023.

#### 3.3.2. Evaluation criteria and questions

*The following sections will list the main questions that should be answered for each of the OECD-DAC and EU specific evaluation criteria. As part of this assessment internal strength and weaknesses of SOCIEUX+ should come to light. The following evaluation questions are indicative. Following initial consultations and document analysis, the evaluation team will discuss them with the FMT and propose in their Inception Report a complete and finalised set of Evaluation Questions with related data collection sources and tools.*

<sup>10</sup> The MTE Team should consider that, in 2024, the FMT simultaneously oversaw the completion of ongoing actions under phase three while also initiating the execution of actions under phase four.

<sup>11</sup> Considering that this evaluation will be performed mid-way during the implementation of the extension of SOCIEUX+ and also that it will be conducted remotely, the analysis of impact is limited to the assessment of early signs of impacts and/or to the estimation of likely impact.

### 3.3.2.1. Relevance

To what extent were, and still are the:

SOCIEUX+ objectives and expected results; and,

The peer-to-peer approach of short-term technical assistance by public experts of SOCIEUX+;

relevant to:

The policy and programme framework set for the development cooperation of the EU on social protection, labour and employment; and

The needs expressed by PIs in their requests for technical assistance and their institutional framework?

To what extent are the planned knowledge development products and activities of SOCIEUX+ relevant to advance the social protection, employment and labour implementation in partner countries of the EU and reinforce EU positioning, including under Global Gateway?

To what extent is the peer-to-peer modality relevant and aligned with the specific institutional needs, capacities and expectations of partner institutions?

### 3.3.2.2. Effectiveness

To what extent were, and still are the:

The management, governance and implementation of SOCIEUX+; and,

Outputs of SOCIEUX+ the technical assistance

effective in:

Delivering the SOCIEUX+ objectives and expected results; and

Responding to the needs expressed by PIs in their requests for technical assistance (adequate, acceptable and of satisfactory quality)?

Were there external factors that contributed in hindering or making it possible to achieve the objectives and expected results of SOCIEUX+?

### 3.3.2.3. Efficiency

How cost-efficient was the technical assistance mobilised by SOCIEUX+ when comparing its actual cost, the quality of its deliverables and its value for money<sup>12</sup> to market prices?

Were structural constraints, such as availability of public expertise, formulation of needs by requesting partner institutions or others, adequately addressed by the management and implementation structures of SOCIEUX+?

Were monitoring, evaluation and reporting mechanisms sufficient to ensure satisfactory feedback for steering SOCIEUX+ and make use of lessons learned?

How efficient is the SOCIEUX+ peer-to-peer cooperation model versus alternative forms of technical assistance (e.g., individual consultancy, TAIX missions), considering mobilisation time, expert availability and responsiveness?

### 3.3.2.4. Impact

Considering the attribution gap between the outputs, objectives and expected results, to what extent has SOCIEUX+ already achieved, or is likely to achieve, its outcomes (objectives and expected results)?

Were there positive or negative unexpected externalities (spill overs) resulting from SOCIEUX+?

### 3.3.2.5. Sustainability

*To what extent has SOCIEUX+ technical assistance put in place institutional mechanisms that promote the sustainability of the interventions?*

Considering that this was not an explicit objective or expected result, did the mobilisation of experts and associated peer-to-peer exchanges in SOCIEUX+ activities result in potential or actual institutional collaborations

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<sup>12</sup> It is understood that the MTE Team shall not attempt a cost-benefit or other economic evaluation on a financial base. However, the consultants shall make a reasonable assessment on the likelihood of the cost-efficiency of technical assistance mobilised by SOCIEUX+ taking into account the actual cost of formulating to implementing activities (including overheads) and their best knowledge of similar agencies such as consulting firms, specialised agencies or/and development agencies.

between EU Member States and partner countries' institutions on social protection, labour and employment?

### **3.3.2.6. Coherence**

Were policies and strategies of Partner Countries considered when formulating SOCIEUX+ technical assistance and knowledge development activities?

What is the degree of synergy of the SOCIEUX+ assistance with the other forms of assistance provided under other EU instruments, *such as TAIEX and Twinning*, the EU development coordination policy and co-funding EU Member States?

### **3.3.2.7. European development cooperation funding and programmes added value**

To what extent does SOCIEUX+ complement partner countries' policies and other donors' interventions?

To what extent is SOCIEUX+ complementary to other development cooperation initiatives to social protection, labour and employment from the EU and EU Member States co-funding the intervention?

### **3.3.2.8. Cross-cutting issues**

The MTE Team should also consider cross-cutting development issues in its assessment of all criteria and questions below, in particular gender equality and reduction of inequalities. This additional dimension should however keep in mind the logic of intervention as presented in the logframe of SOCIEUX+ and the nature of the Facility.

## **3.3.3. Minimum tasks**

*As guidance, the MTE Team may follow the steps described below. An indicative timeframe for the MTE tasks and completion is provided in Annexe D.*

### **3.3.3.1. Desk Phase**

During the desk phase, the experts shall review the key project documentation which will be provided in electronic version by the FMT, as well as documents shaping the wider policy framework (e.g., the 2012 Communication on SP in EU Development Cooperation, the 2017 European Consensus on Development, United Nations 2030 Agenda for Sustainable Development, The EU development cooperation strategy, etc.) to become acquainted with the nature of the SOCIEUX+.

Subsequently, a meeting will be organised in Brussels between the MTE Team, the FMT and the EC, to clarify any remaining question of the consultants on their assignment and expectations of the contractor.

Based on the information collected, the MTE Team shall prepare **an inception report** which:

1. Summarises the objectives, scope and outputs of the evaluation.
2. Comments on the evaluation questions suggested or, where relevant, propose an alternative or complementary set of evaluation questions, justifying their relevance.
3. Presents the methodology for the overall evaluation.
4. Presents a draft work plan for the field and reporting phases including:
  - a. a list of key stakeholders to be interviewed, criteria of selection of those as necessary and indicative questions to be covered during the structured or semi-structured interviews; and,
  - b. a detailed timeframe and workload associated with any travel and onsite visits (note that no visits to partner countries are to be planned in the framework of the MTE).

The draft work plan will be commented by the FMT. The comments shall be incorporated by the MTE Team prior to the start of the data collection phase of the MTE.

### **3.3.3.2. Data collection Phase**

The phase will start upon approval of the inception report by the FMT. The data collection phase will involve interviews to all Implementing Partners (in Brussels, Paris and Madrid). As far as possible, virtual meetings shall be preferred and organised.

The MTE Team cannot be provided with unlimited access to the Sharepoint/data repository of SOCIEUX+ as this is hosted on the secured servers of the Belgian Federal Services for Social Security. *Ad hoc* accessible folders may be created for the purpose of this assignment. The MTE Team may be also provided with copies of the documentation on request.



Access to the Project Management Tool (PMT) of SOCIEUX+ will be provided at PSC Members restriction level, assuming a prior written commitment by the MTE Team members for the limited and confidential use of the data for the sole purpose and duration of their assignment.

The MTE Team will not be provided with working space by the contractor or any of the Implementation Partners during any phase of the MTE. Access to the offices of the Implementation Partners will be restricted and on-demand only. The MTE Team is responsible for the logistics of interviews, i.e. set up of appointments, transportation, virtual or phone teleconferencing facilities, etc. The FMT may assist punctually with the latter logistics without obligation or prior commitment.

A debriefing session with the FMT shall be organised in Brussels (or by teleconference) at the end of the data collection phase to review the main findings and preliminary recommendations of the MTE.

### **3.3.3.3. Reporting Phase**

This phase is mainly devoted to the preparation of the MTE Report based on the work done during the data collection phase and taking into consideration the outcomes of the debriefing meeting with FMT.

As set in the rationale and objectives of the MTE, the MTE Team shall formulate relevant and, most importantly, feasible (in scope, institutional and timeframe), recommendations for the reorientation of SOCIEUX+ in its implementation and purpose.

Recommendations shall be classified in their application into:

- Immediately-applicable: Recommendations that can directly and with minimum resources and efforts be applied to improve mainly effectiveness and efficiency of SOCIEUX+. Such recommendations may be implemented by the FMT even before the MTE final report is approved by SOCIEUX+ PSC.
- Short-term: Recommendations that can be implemented in a period of six months to improve effectiveness, efficiency, impact, sustainability and coherence of SOCIEUX+.
- Medium-term: Recommendations for that shall be applied by latest at the closure phase of SOCIEUX+, e.g. type of events to be organised, products to be capitalised on. These recommendations shall aim at improving the overall impact and sustainability of SOCIEUX+ as a Facility rather than individual technical assistance actions.
- Long-term: Recommendations that can only be considered for the design of a potential new phase of SOCIEUX+. These should particularly look at questions of relevance, impact, sustainability, coherence and EU development cooperation policy added value of SOCIEUX+ as a Facility but also of technical actions in general.

The recommendations shall also identify the individual stakeholders to be responsible for their implementation. Assumptions for the implementation of the recommendations shall be formulated, and be an integrated part of the recommendations made by the MTE Team.

In the formulation of their recommendations, the MTE should also take into account external opportunities that can be taken advantage of and threats that can be mitigated through direct changes in the implementation of SOCIEUX+ or through the Implementing Partners and the EC.

The MTE Team is expected to make an in-person presentation of the findings and key takeaways of the study in the FMT office in Brussels.

## **3.3.4. Outputs**

For each output, the FMT will send the Contractor consolidated comments or the approval of the output itself within 25 calendar days. The revised reports addressing the comments shall be submitted within 15 calendar days from the date of receipt of the comments. The MTE Team should provide a separate document explaining how and where comments have been integrated or the reason for not integrating certain comments, if this is the case.

### **3.3.4.1. An Inception Report**

The inception report will draw the structuring phase of the evaluation and set out detailed planning of the assignment activities, including the work plan. If necessary, it will reformulate and clarify the evaluation questions. It will also describe how the proposed method will be implemented in light of examining the quality and appropriateness of existing data and how the method can provide answers to the questions and respective judgements.

Therefore, the inception report should contain at least the following points: characterisation of the object of the evaluation, consideration of cross-cutting issues, objectives, the evaluation matrix, methodological proposal with the associated tools and methods to answer the questions, a detailed work plan associated with the timeline and possible constraints observed in carrying out the evaluation. The work plan will contain the plan for interviews and



the sending of questionnaires if necessary and the analysis of the information, with proposed dates and names of persons.

### **3.3.4.2. An Evaluation Report**

The MTE Report should answer the evaluation questions agreed in the inception phase in line with the content of section 3.3.1 of these terms of reference, and meet all the objectives and requested services. It will take into account the results of quality assessments and discussions with the European Commission, FMT and the Implementation Partnership members insofar as they do not interfere with the independence of the MTE Team opinions.

The outline of the final Report will be agreed during the inception phase. Testimonials and/or successful stories can be included to the final report to collect evidence and convey the impact of the Facility.

The outline of the final Report will be agreed during the inception phase. For guidance on the structure of the final report, please refer to Annexe C; the final report should contain at least: introduction with the objectives, purpose and scope of the evaluation, background and context of the intervention evaluated, methodology used, limitations encountered, answers to the evaluation questions, evaluation findings, conclusions, lessons learned and good practices and recommendations. A list of annexes, which will include, among others: the detailed methodology (techniques and tools applied such as interview scripts, questionnaires, etc.), list of documents analysed, as well as a list of the people who have been interviewed or sent a questionnaire.

Findings and conclusions should be structured in such a way that they clearly answer the evaluation questions. The conclusions and recommendations of the report should be derived from the findings. Lessons learned should be drawn only if they represent contributions to general knowledge and are strongly supported by the findings and conclusions. Recommendations should be linked to the conclusions, should be limited in number avoiding generic wording, and should indicate suggestions for their implementation and to whom they are addressed, as they should be able to serve as guidelines for future action.

The final Report shall include an executive summary. Maximum of 4-5 pages, in clear and concise language and including at least: introduction (with the objectives, purpose and scope of the evaluation), methodology used, a synthesis of the main findings and conclusions for each of the evaluation questions and the recommendations associated with each conclusion.

### **3.3.4.3. Summarised Presentations: PPT and Infographic**

The final Evaluation Report should be accompanied by at least two different summarised visual presentations, summarising the key findings of the evaluation, lessons learned and recommendations, which will be distributed to the Implementing Partners and other stakeholders.

Two visual presentations are proposed, although the provider may propose additional developments and products to meet this output:

- 1) Power Point Summary, conceived as a slide narrative presentation with the key findings, data, lessons and recommendations presented in a schematic, visual and engaging way.
- 2) Infographic Summary: conceived as an infographic piece from 1 to 3 pages, with the key elements, ideas and insights presented in a visual document, in easily shareable formats (basic pdf, interactive pdf, doc, jpg, png, etc).

These presentations will be designed and written in a way as to make findings and recommendations clear and easily accessible to a broad audience.

All raw files (ppt, pdf, graphic files, visual elements, etc) will be sent to SOCIEUX+ for its future use and further applications.

## **4. Mid-Term Evaluation Team**

### **4.1. Volume of work**

The assignment will be implemented by one senior expert (team leader), and two thematic experts. The estimated number of days for the assignment per team member expert is provided in Section 4.2. The total estimated amount for the entire MTE Team is 80.

A careful combination of experts' profiles is essential for the success of the assignment. The Team Leader will have the overall responsibility for the coordination of the work.

## 4.2. Profile of experts

Table 1 Expected experts profile

Expert 1	Senior expert (Team Leader)
<b>Area of expertise</b>	Monitoring and evaluation of capacity development interventions in social affairs
<b>Qualifications</b>	Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, social protection, labour or/and employment policies. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience.
<b>Experience</b>	At least 10 years of professional experience in the evaluation of development cooperation projects in the area of capacity building and institutional development;  Excellent applied knowledge of the principles and working methods of project cycle management and European development cooperation delivery methods;  Practical experience in knowledge development measures design and implementation; and,  Significant working experience in capacity development in relevant areas of social protection, labour or/and employment fields, with recognised development cooperation agencies.
<b>Volume of work</b>	40 working days <u>including travels to Brussels, Paris and/or Madrid</u>
Expert 2	Social protection expert
<b>Task</b>	Expert on Social Protection
<b>Qualifications</b>	Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, social protection. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience.
<b>Experience</b>	At least three years of experience as evaluator in development cooperation.  5 years' experience in development project management and/or academic research in the field of social protection in the context of low and middle income countries.  Demonstrated international or multilateral experience.  Skills in stakeholder engagement and comparative policy analysis.
<b>Volume of work</b>	20 working days <u>including travels to Brussels, Paris and/or Madrid</u>
Expert 3	Labour and employment expert
<b>Task</b>	Expert on labour and employment
<b>Qualifications</b>	Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, labour or/and employment policies. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience;

<b>Experience</b>	At least three years of experience as evaluator in development cooperation.  5 years' experience in development project management and/or academic research in the field of labour and employment in the context of low- and middle-income countries.  Demonstrated international or multilateral experience in employment-related projects or social policy. Skills in stakeholder engagement and comparative policy analysis.
<b>Volume of work</b>	20 working days <u>including travels to Brussels, Paris and/or Madrid</u>

### 4.3. Working language(s)

The working language of SOCIEUX+ are English, French and Spanish. All documents and templates used by the FMT to assess a request and implement an action are in these three languages. However, requests in Portuguese and Russian are also accepted.

All MTE experts will need to speak, read and write excellent English. At least, one of the experts need a working level (read and speaking) of French and, at least one other, need a working level (read and speaking) of Spanish.

The outputs of the MTE will be submitted in British English.

## 5. Proposal submission

Consulting firms are invited to present technical and financial proposals in accordance to [Table 2](#). Proposals received after the deadline will not be accepted. The consulting firm will be selected based on the evaluation of the technical and financial proposal as outlined below. Proposals may be submitted in English, on *PLACE*, the French government's electronic public tender platform. It enables companies to view and submit bids for tenders issued by government departments, public institutions and entities subject to the Public Procurement Code. The link to access the tender consultation space and to submit an offer is: <https://www.marches-publics.gouv.fr>

### 5.1. Technical proposal

The proposal should demonstrate the understanding of the tasks set forth above, the consulting firm capability to perform the assignment and the professional approach to the needs of the target audience of their final product (here understood as the Implementing Partners of SOCIEUX+ and the EC).

The presentation of the following is recommended:

- Description of the object to be evaluated.
- Background and context of the evaluation.
- Methodological approach
- Evaluation matrix
- Schedule and work plan including the tasks to be developed and the time each team member will dedicate to the evaluation.
- Description of the products to be delivered with the evaluation and proposal for expansion or improvement.

The technical proposal shall not exceed 3000 words without annexes, figures and tables. The proposal shall outline the specific roles of each member of the MTE Team. The consultants shall take into account in their methodology development the annexes of this ToR.

Detailed updated curricula vitae in Europass Format of the proposed MTE Team members shall be annexed to the proposal. Biosketches of maximum 400 words shall be provided for each member of the MTE Team. These biosketches shall underline the key experiences and skills qualifying the team member for the successful implementation of the proposal. Documentation may be requested at any time to prove the veracity of the

experience indicated in the requirements set forth in [Table 1](#).

## 5.2. Financial proposal

The financial proposal shall be submitted separately. The proposal shall present the volume of work (working days) for each member of the MTE Team and individual unit costs. Any overheads or auxiliary costs shall be included in the unit costs. No reimbursing costs shall be foreseen. All assumptions made in developing the financial proposal must be made explicit.

In addition, a breakdown shall include the percentage of workload for each profile, in relation to the products contemplated for the evaluation and the estimated budget associated with each product for its achievement.

## 5.3. Conflict of interest

The MTE Team members must not have had a direct role in the formulation, planning or implementation of the SOCIEUX+.

## 5.4. Proposals evaluation

### 5.4.1. Technical proposal

The evaluation table in Annexe F shall apply for the evaluation of the technical and financial proposals. All technical evaluation criteria shall be scored from one (lower qualification) to five (higher qualification). Criteria that do not meet the minimum qualification shall be scored as zero.

All technical proposal with a total score of lower than 65% or any Yes or No individual criteria scored with “No” shall be invalidated.

The technical proposal shall account for 80% of the total evaluation score.

### 5.4.2. Financial evaluation

The financial proposal shall account for 20% of the total evaluation score. Financial proposals that are considered abnormally low in their estimation of costs may be rejected but only after assessment of the written explanation on the reasons for low estimated cost.

### 5.4.3. Overall evaluation

The final and overall evaluation score for the proposals will be calculated as per the following formula:

$$Score = \frac{F_{lowest}}{F} \cdot X + \frac{T}{T_{highest}} \cdot (1 - X)$$

Where:

Score = the score of the overall proposal

$F_{lowest}$  = the total value of the lowest financial proposal

F = the total value of the evaluated financial proposal

$T_{highest}$  = the total score of the technical proposal with the highest score

T = the total score of the evaluated technical proposal

X = the ponderation of the financial proposal on the overall score of the proposal (equal to 20%)

During the evaluation process of the proposals received the Contracting Authority reserves the right to interview remotely shortlisted candidates. The consulting firm will be expected to commence services on the date specified in the contract.

Table 2 Chronology of proposals submission and selection process

Formal publication of ToR	30 January 2026
Proposal submission	22 February 2026, at 23:59.
Communication of selected candidate	03 March 2026
Formalising and contract signing	30 March 2026
Activities to commence	01 April 2026

## 6. Annexes

# Annexe A - List of countries eligible to SOCIEUX+ support<sup>13</sup>

## *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 Barthélemy (FR), Sint Eustatius (NL), Sint Maarten (NL), St. Pierre and Miquelon (FR), Wallis and Futuna Islands (FR).

## *Eligible countries under the 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

<sup>13</sup> Source: 2021.1 - Countries Eligible under EU procurement provisions

## Annexe B - SOCIEUX+ logical framework

Logical Framework (logframe) of SOCIEUX+ extension (2024-2027)

Level	Results chain: Main expected results	Indicators: (at least one indicator per expected result)	Baselines (2024-01-01)	Targets (2027-31-12)	Sources of data	Assumptions
Impact	Increased employment opportunities and inclusive social protection systems in partner countries	IMP.1. Average proportion of population covered by social protection floors/systems in the partner countries (SDG 1.3.1) <i>Disaggregated by sex and country</i>	46.9 (at 2020, last aggregate data available)	48.7	Global SDG Indicators Database (UNSTAT)	Not applicable
		IMP.2. Average proportion of informal employment in total employment in the partner countries (SDG Indicator 8.3.1) <i>Disaggregated by sex and country</i>	57.8 (at 2024)	57.4	ILOSTAT	
Outcome	Improved policy and institutional frameworks for the development of labour, employment and social protection in partner countries, based on an inclusive and sustainable approach	OC.1. Number of laws and/or government policies that have been adopted by the partner countries with EU support. <i>Disaggregated by sector and country</i>	0	16	FMT monitoring and evaluation system (Expert Mission Report, internal/external ex-post evaluation reports, follow-up surveys)	The economic situation in the partner countries remains stable, maintaining current employment trends and enabling the estimated public investment in the employment promotion policy and social protection system.
		OC.2. Percentage of partner institutions with competencies in the field of employment, labour and social protection that have implemented best practices and/or new management tools delivered through the intervention. <i>Disaggregated by sector and country</i>	0	80%	FMT monitoring and evaluation system (Expert Mission Report, internal/external ex-post evaluation reports, follow-up surveys)	The geopolitical situation remains stable in the region where the intervention is being implemented, with no new crises negatively impacting the political and trade relations of the participating countries.



Level	Results chain: Main expected results	Indicators: (at least one indicator per expected result)	Baselines (2024-01-01)	Targets (2027-31-12)	Sources of data	Assumptions
Outputs	<b>Output 1</b>  Improved technical capacities of partner institutions in the design and implementation of employment, labour and social protection policies, strategies and mechanisms	OP.1.1. Number of countries which have benefitted from EU support to strengthen their social protection systems (Matching GEF 2.31), <i>disaggregated by type of assistance</i>	0	16	FMT monitoring system (PMT database)	Decision-makers and institutional representatives remain open to policy dialogue among peers and to the incorporation of other international experiences and/or good practices
		OP.1.2. Number of countries which have benefitted from EU support to strengthen their labour and employment systems and policies, <i>disaggregated by type of assistance</i>	0	32	FMT monitoring system (PMT database)	
		OP.1.3. Number of partner institutions that have developed and/or revised their public management tools (procedures, data basis, social services, etc.) in the field of employment, labour and social protection with the support of the intervention. <i>Disaggregated by country and sector</i>	0	20	FMT monitoring and evaluation system (Expert Mission Report, follow-up surveys)	The National Governments of the participating countries remain committed to incorporating new mechanisms and procedures that enable the effective inclusion of the most vulnerable groups in the labour, employment, and social protection systems
		OP.1.4 Number of public managements tools (procedures, data basis, social services, etc.) that have been developed and/ or revised in the field of employment, labour and social protection with the support of the intervention. <i>Disaggregated by country and sector.</i>	0	30	FMT monitoring and evaluation system (Expert Mission Report, follow-up surveys)	

Level	Results chain: Main expected results	Indicators: (at least one indicator per expected result)	Baselines (2024-01-01)	Targets (2027-31-12)	Sources of data	Assumptions
		OP.1.5. Number of partner institutions that have developed specific strategies and/or activities for assisting local stakeholders in applying the new Directive on Corporate Sustainability Due Diligence-CSDD with the support of the intervention. <i>Disaggregated by country</i>	0	3	FMT monitoring and evaluation system (Expert Mission Report, follow-up surveys)	
		OP.1.6 Number of specific strategies and /or activities for assisting local stakeholders in applying the new CSDD Directive developed with the support of the intervention. <i>Disaggregated by country.</i>	0	3	FMT monitoring and evaluation system (Expert Mission Report, follow-up surveys)	
Outputs	<b>Output 2</b>  Strengthened capacities of partner countries' institutions in the effective inclusion of the most vulnerable groups (women, youth, persons with disabilities, etc.) in labour, employment and social protection systems	OP.2.1. Number of regulatory adjustments and/or policy reforms that have been developed and/or revised with the support of the intervention in the area of labour, employment and social protection. <i>Disaggregated by sector and country</i>	0	27	FMT monitoring and evaluation system (Expert Mission Report, follow-up surveys)	
		OP.2.2. Number of European institutions that have been actively involved in the peer-to-peer cooperation strategies implemented through the intervention to share experiences and best practices. <i>Disaggregated by sector and type of institution</i>	0	80	FMT monitoring system (PMT database, attendance list of knowledge events)	

Level	Results chain: Main expected results	Indicators: (at least one indicator per expected result)	Baselines (2024-01-01)	Targets (2027-31-12)	Sources of data	Assumptions
		OP.2.3. Percentage of people, staff of the competent authorities and/or other key stakeholders who have improved their knowledge for the design and implementation of labour, employment and/or social protection strategies and services, including strategies and activities related to the new CSDD Directive. <i>Disaggregated by sex, country and sector</i>	0	90%	FMT monitoring and evaluation system (feedback questionnaires)	
Outputs	<b>Output 3</b>  Increased awareness and knowledge exchange among competent institutions of partner countries on social protection, decent work, labour rights and responsible business conduct	OP.3.1. Number of knowledge tools that have been developed with the support of the intervention to increase the available information and the awareness on social protection, decent work and labour standards in the targeted countries. <i>Disaggregated by type of tool and sector</i>	0	20	Knowledge tools and products	
		OP.3.2. Number of European and partner countries' experts that have been involved in SOCIEUX+ networking activities to share knowledge and good practices on social protection, decent work and labour standards. <i>Disaggregated by country of origin, type of institution and sector</i>	0	200	Networking activities attendance list	
		OP.3.3. Number of people who have received relevant information on social protection, decent work and labour standards and policies through the awareness-raising initiatives developed in coordination with the targeted countries. <i>Disaggregated by country</i>	0	450	Awareness-raising initiatives attendance list	

**Assumptions for activity level**

- National governments and other key stakeholders continue to be interested in training and capacity building strategies, allocating the necessary technical and human resources.
- Member States' institutions and other European organisations remain willing to participate in the policy dialogue and knowledge exchange initiatives.
- Partner Institutions in partner countries continue to be interested in increasing their capacities around the new directive on Corporate Sustainability Due Diligence, as well as in disseminating knowledge to other key actors at the national level.
- SOCIEUX + participants remain open to share experiences, good practices and success stories to feed the knowledge management and institutional learning platform and strategies promoted through the interventio

## Annexe C - Reports structure

### General considerations

The report shall be provided in **standard formatting of SOCIEUX+ documents**. The template Microsoft Word will be provided to the MTE Team.

All deliverables (reports and presentation), intermediary/draft or final shall be provided in **English**. The authors shall take particular attention in their writing style to ensure an easy understanding of messages and information across all the report but most particularly in the Executive Summary of the report<sup>14</sup>. Figures may be favoured to complement to the main text. Tables and figures with their captions should be understandable on their own.

The authors shall use internal reference and multilevel numbered sections and subsections titles to ease the logical structure of the content of the report.

All intermediary/draft deliverables are to be provided in electronic editable versions (Microsoft Word and/or PowerPoint) directly by email to [dijana.mirvic@socieux.eu](mailto:dijana.mirvic@socieux.eu) and to [andrea.dallapalma@socieux.eu](mailto:andrea.dallapalma@socieux.eu).

The MTE Team shall also transfer any electronic files used to generate tables, charts or figures used in the deliverables.

In addition to the electronic versions, the Final MTE Report shall be provided in hardcopy: in full colour, paper cover and plain paper. Hardcopies are to be mailed or delivered to:

Géralda Michaud Thelusma

SOCIEUX+

Human Capital and Social Development Department

EXPERTISE FRANCE

40 Bd de Port-Royal, 75005 Paris

Costs of editing, publishing, printing or any other service required to finalise the deliverables is to be covered by the MTE Team.

### Inception Report

The draft final inception report should **not exceed 5,000 words excluding tables, charts and annexes**. The document shall cover all the below aspects:

1. Summarising of the objectives, scope and outputs of the evaluation;
2. Comments on the evaluation questions suggested or, where relevant, propose an alternative or complementary set of evaluation questions, justifying their relevance.
3. Presentation of the methodology for the overall evaluation.
4. Presentation of a draft work plan for the field and reporting phases including:
  - a. a list of key stakeholders to be interviewed, criteria of selection of those as necessary and indicative questions to be covered during the structured or semi-structured interviews;
  - b. a detailed timeframe and workload associated with any travel and onsite visits (note that no visits to partner countries are to be planned in the framework of the MTE).

*The Inception report and its work plan will be commented by the FMT, the Implementing Partners and the EC. The comments shall be incorporated by the MTE Team prior to the start of the Field Phase of the MTE.*

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<sup>14</sup> The authors may use "[The Economist Style Guide](#)" and "[English Style Guide – Handbook for authors and translators in the European Commission](#)" as a references for their writing style and spelling, respectively.

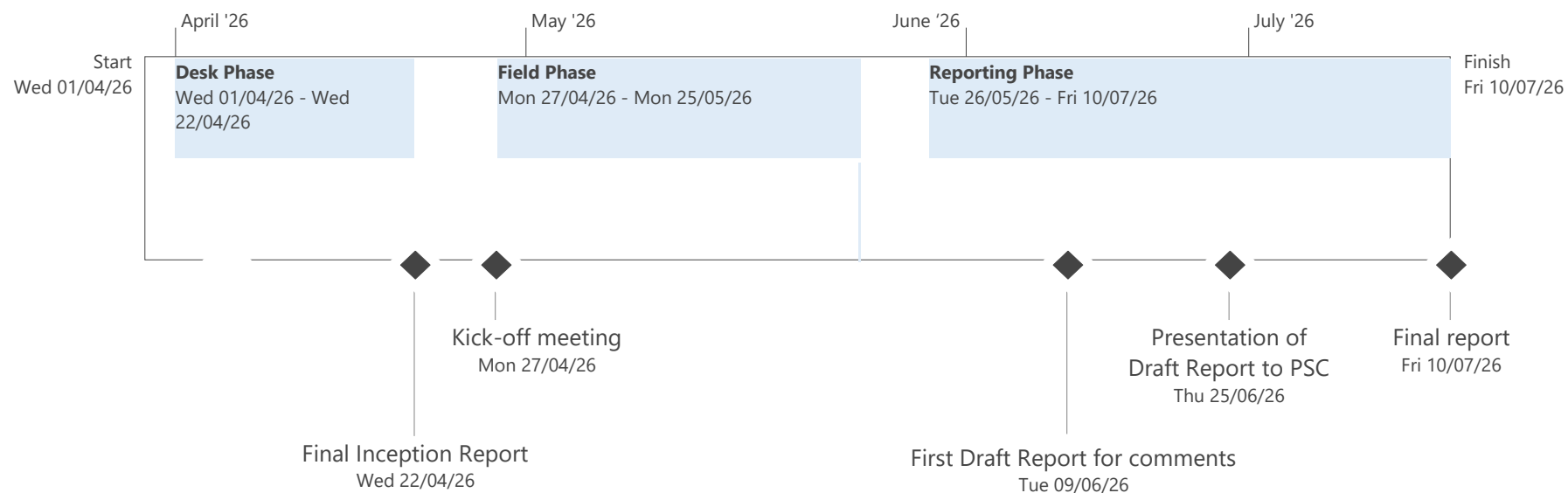
**Report structure (Indicative)**

The draft final report should **not exceed 30,000 words excluding tables, charts, executive summary and annexes**.

*The MTE team shall in the formulation of the content take into account the instructions provided in the present ToR.*

- Cover page (in SOCIEUX+ format without authors reference or company logos)
- Title page (with imprint including authors references and standard disclaimers)
- Table of contents
- List of tables
- List of figures/charts
- List of acronyms
- Executive summary (2500 words maximum)
- 1. Introduction
  - 1.1. Overview of SOCIEUX+ (brief presentation of the Facility)
  - 1.2. Purpose and objectives of the MTE
- 2. Methodology (brief outline of the methods used only; presentation of the research questions; refer to annexes for list: of documents consulted, list of interviewed, reproduction of semi-structured questionnaires, final agenda of mission, etc)
- 3. Findings (reporting of the findings of the evaluation, structured according to the evaluation criteria and research questions)
  - 3.1. Evaluation criteria
    - 3.1.1. Relevance
    - 3.1.2. Effectiveness
    - 3.1.3. Efficiency
    - 3.1.4. Impact
    - 3.1.5. Sustainability
    - 3.1.6. Coherence
    - 3.1.7. European development cooperation policy added value
  - 3.2. Overall assessment– synthesis of the findings/answers on the research question.
  - 3.3. Lessons learned (in bullet format) – this section should only present new key lessons that add to the knowledge and results of previous key publications on SOCIEUX and SOCIEUX+ (SOCIEUX MTE report; SOCIEUX Final Report; SOCIEUX+ Interim report; etc.)
- 4. Recommendations (in bullet format)
  - 4.1. Immediately-applicable recommendations
  - 4.2. Short-term recommendations
  - 4.3. Medium-term recommendations
  - 4.4. Long-term recommendations
- 5. Conclusions– this section shall wrap up simple language the content of the findings and recommendation sections. It should be structured in maximum three to four key messages that can easily be shared with executives of SOCIEUX+ executives.
- Annexes
  - Table of annexes
  - (Numbered annexes)

## Annexe D - Implementation timeframe<sup>15</sup>



<sup>15</sup> This timeframe is indicative; it could be adjusted during the inception phase.

## Annexe E - Key documentation for the MTE

The following documents should serve as reference:

- SOCIEUX+ Project Document
  - DoA
  - Communication strategy
  - Knowledge Development strategy
  - Monitoring and Evaluation strategy
  - Business development strategy
- Interim Progress Reports
- Result Oriented Monitoring (ROM) report, 2023
- Mid-term Evaluation of the previous phase of SOCIEUX+, 2023
- Standard Operating procedure Manual
- Minutes of Project Steering Committees
- SOCIEUX+ actions documentation, including evaluation reports of activities made by mobilized experts; final evaluation of actions made by the FMT and; results of short-term feedback questionnaires to Partner Institutions, to mobilized experts and to other institutions that participated to trainings and seminars
- Other Strategic documents.



## Annexe F - Technical proposal evaluation criteria and weight

Criteria	Score (0-5)	Weight
<b>Organization and Methodology</b>		<b>40%</b>
<b>The TOR evaluation matrix is completed in detail and quality</b>		<b>10%</b>
<b>The evaluative approach, methods and tools associated with the evaluation are detailed and of high quality</b>		<b>10%</b>
<b>The work plan, based on the schedule, is detailed and offers a work agenda in accordance with the scope of the evaluation</b>		<b>10%</b>
<b>Added value to the minimum methodological principles, criteria and tasks proposed in the ToR, or additional outputs proposed</b>		<b>10%</b>
<b>Consultants' expertise</b>		<b>60%</b>
At least one consultant has a working level of French	Yes/No	
At least one consultant has a working level of Spanish	Yes/No	
At least one consultant has demonstrated experience in data analysis with Excel, Power BI, Python, R, Tableau, or other similar data visualisation software	Yes/No	
<b>Team Leader</b>		<b>30%</b>
At least 10 years of experience as evaluator of development cooperation interventions (those that have been published should be attached)	Yes/No	
At least 10 evaluations carried out, as team leader or team member (those that have been published should be attached)	Yes/No	
Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, social protection, labour or/and employment policies. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience		5%
Specific experience in :		
monitoring and evaluation of EU-funded capacity building and institutional development programmes		5%
applied knowledge of the project cycle management of EU-funded programmes		5%
knowledge development and management		5%
capacity development in the area of social protection		5%
capacity development in the areas of labour & employment		5%
Other skills :		
Proficiency in English	Yes/No	
<b>Social protection expert</b>		<b>15%</b>
At least three years of experience as evaluator in development cooperation	Yes/No	
Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, social protection. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience		5%
Specific experience in:		

project management in the field of social protection		3%
development project management in low- and middle-income countries		3%
academic research on social protection policies and systems		4%
Other skills		
Proficiency in English	Yes/No	
<b>Labour and employment expert</b>		<b>15%</b>
At least three years of experience as evaluator in development cooperation	Yes/No	
Master's Degree (or equivalent diploma) in a field related to economic development, social sciences, human development, labour or/and employment policies. In its absence, the master degree can be replaced by 5 years of professional experience in one or more of these fields, in addition to the minimum general professional experience		5%
Specific experience in :		
project management in the fields of labour and employment		3%
development project management in low and middle income countries		3%
academic research on labour and employment policies and services		4%
Other skills		
Proficiency in English	Yes/No	
<b>Grand Total Score</b>		<b>100%</b>

## Annexe G - Glossary

The full *Glossary of Key Terms in Evaluation and Results Based Management* used in the framework of the evaluation criteria of the OECD-DAC is available at: <http://www.oecd.org/dac/evaluation/2754804.pdf>

<b>Relevance</b>	<p>The extent to which the aid activity is suited to the priorities and policies of the target group, recipient and donor.</p> <p>In evaluating the relevance of a intervention or a project, it is useful to consider the following questions:</p> <ul style="list-style-type: none"> <li>• To what extent are the objectives of the intervention still valid?</li> <li>• Are the activities and outputs of the intervention consistent with the overall goal and the attainment of its objectives?</li> <li>• Are the activities and outputs of the intervention consistent with the intended impacts and effects?</li> </ul>
<b>Effectiveness</b>	<p>A measure of the extent to which an aid activity attains its objectives.</p> <p>In evaluating the effectiveness of a intervention or a project, it is useful to consider the following questions:</p> <ul style="list-style-type: none"> <li>• To what extent were the objectives achieved / are likely to be achieved?</li> <li>• What were the major factors influencing the achievement or non-achievement of the objectives?</li> </ul>
<b>Efficiency</b>	<p>Efficiency measures the outputs -- qualitative and quantitative -- in relation to the inputs. It is an economic term which signifies that the aid uses the least costly resources possible in order to achieve the desired results. This generally requires comparing alternative approaches to achieving the same outputs, to see whether the most efficient process has been adopted.</p> <ul style="list-style-type: none"> <li>• When evaluating the efficiency of a intervention or a project, it is useful to consider the following questions:</li> <li>• Were activities cost-efficient?</li> <li>• Were objectives achieved on time?</li> <li>• Was the intervention or project implemented in the most efficient way compared to alternatives?</li> </ul>
<b>Impact</b>	<p>The positive and negative changes produced by a development intervention, directly or indirectly, intended or unintended. This involves the main impacts and effects resulting from the activity on the local social, economic, environmental and other development indicators. The examination should be concerned with both intended and unintended results and must also include the positive and negative impact of external factors, such as changes in terms of trade and financial conditions.</p> <ul style="list-style-type: none"> <li>• When evaluating the impact of a programme or a project, it is useful to consider the following questions:</li> <li>• What has happened as a result of the programme or project?</li> <li>• What real difference has the activity made to the beneficiaries?</li> <li>• How many people have been affected?</li> </ul>
<b>Sustainability</b>	<p>Sustainability is concerned with measuring whether the benefits of an activity are likely to continue after donor funding has been withdrawn. Projects need to be environmentally as well as financially sustainable.</p> <ul style="list-style-type: none"> <li>• When evaluating the sustainability of a programme or a project, it is useful to consider the following questions:</li> <li>• To what extent did the benefits of a programme or project continue after donor funding ceased?</li> </ul>

	<ul style="list-style-type: none"> <li>What were the major factors which influenced the achievement or non-achievement of sustainability of the programme or project?</li> </ul>
<b>Coherence/</b> Complementarity	<p>This criterion may have several dimensions:</p> <ul style="list-style-type: none"> <li>Coherence within the Commission's development intervention</li> <li>Coherence/complementarity with the partner country's policies and with other donors' interventions</li> <li>Coherence/complementarity with the other Community policies</li> </ul>
European development cooperation funding <b>added value</b>	The extent to which the project/intervention adds benefits to what would have resulted from Member States' interventions in the same context.



## 7. About SOCIEUX+

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, the Belgian Development Agency (Enabel), and the Fundación para la Internacionalización de las Administraciones Públicas (FIAP) from Spain.

The Facility's general objective is to expand and improve access to better employment opportunities and inclusive Social Protection systems in Partner Countries. Its specific objective is to enhance Partner Countries' capacity to design, manage, and monitor inclusive, effective, and sustainable employment strategies and Social Protection systems through short-term, peer-to-peer technical assistance and knowledge development.

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:** [www.socieux.eu](http://www.socieux.eu)

