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About SOCIEUX

The EuropeAid funded project "SOCIEUX - Social Protection EU Expertise in Development Cooperation", is a technical assistance facility to support the efforts of partner countries to better design and manage social protection systems by means of short-term peer-to-peer inputs to be delivered by experts drawn primarily from the European Union Member States' public administrations and mandated bodies. Practitioners from partner countries administrations can also be mobilised as experts to bring added value in a South-South and triangular cooperation.

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Welcome

Social protection lies at the heart of Europe's vision of cohesive societies in which all can benefit from shared prosperity. The European Union is indeed a point of reference for effective social protection: each Member State has responsibility for its own policies and systems, but all aspire to the provision of widespread social protection against the main risks of life. In February 2013, the European Commission adopted the Social Investment Package, which provides policy guidance to Member States for more effective and efficient social protection systems and social investment throughout life.

The 2012 *Communication on Social Protection in EU Development Cooperation* acknowledges the role that social protection can play in reducing poverty and supporting inclusive growth. It also articulates the commitment by the EU to support nationally owned social protection systems, particularly by supporting partner countries to set up their strategic, policy, legal and institutional frameworks, and to strengthen the administrative and implementation capacities of governments, implementing agencies, social partners and other non-state actors.

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SOCIEUX was born as a small initiative contributing to make this commitment a reality, alongside more substantial bilateral cooperation projects with a limited number of countries. It allows the wealth of experience in the field of social protection accumulated by the EU to be accessible to our partner countries through short-term peer-to-peer exchanges. It also enables sharing the experiences of other developing countries through triangular cooperation. In practice the interventions provided by SOCIEUX not only supply key technical inputs for our partners, but also provide a rewarding experience for the European civil servants who are exposed to innovative social protection experiences emanating from other countries of the world.

We are pleased to launch this first issue of "SOCIEUX in Action", which showcases the first actions of the project and look forward to sharing with you many more exciting actions from around the world in the future.

Ms H el ene Bourgade

**Head of the Employment, Social Inclusion and Migration Unit at EuropeAid,
European Commission**

SOCIEUX is governed by a **Programme Steering Committee** composed of members of the European Commission and a Consortium of partners from the EU Member States working in social protection and international cooperation.

SOCIEUX is implemented by the following Consortium:

Gesellschaft f ur
Versicherungswissenschaft
und -gestaltung e.V.



giz Deutsche Gesellschaft
f ur Internationale
Zusammenarbeit (GIZ) GmbH



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Social Protection in Jamaica

On 16th July 2014, the PIOJ officially launched the comprehensive Social Protection Strategy, an important step forward for the provision of effective social protection, as set out in the country's National Development Plan – Vision 2030 Jamaica. The *Social Protection Strategy* adopts a rights-based, social risk management approach to address social protection needs throughout the life-cycle. It pays special attention to financing through *resource mobilisation* and *prioritisation* at the Government budget level, *public-private partnerships* and *personal responsibility*.



SOCIEUX works through short-term peer-to-peer inputs delivered by experts from both the EU Member States and partner countries, to bring added value in a South-South and triangular cooperation. The photograph shows SOCIEUX experts Mr. Michel Rovers (3th from left) and Mr. Derek Osborne (5th from left) with some of the participants.

Technical capacity-building for financing social protection in Jamaica

Kingston, Jamaica 7th to 11th July 2014.- *SOCIEUX trained the Planning Institute of Jamaica (PIOJ) and other institutions dealing with social protection in the financing of social protection and discussed the costing of Jamaica's Social Protection Floor*

The Planning Institute of Jamaica (PIOJ), which is the main planning agency of the Jamaican Government, plays a critical role in the implementation of Jamaica's Social Protection Strategy, the success of which depends to a large extent on a financing that is robust enough to withstand economic shocks. This led the PIOJ to request SOCIEUX support in the form of a tailored training workshop on financing social protection and an on-site review of its costing process for the Social Protection Floor for Jamaica.

The training session covered various issues, ranging from trends, patterns and determinants of social expenditure to the nexus of economic growth and social protection, the role of taxation, innovative resourcing strategies and investing social protection reserves. The participants were introduced to the pros and cons of various types of financing approaches, such as pay-as-you-go and funded schemes, how to examine each approach, and which specific questions should be posed in assessing alternative options for financing.

The technical training course was attended by representatives of the PIOJ and other social-protection-related institutions, some of which also took part in a two-day round table discussion to revise costing procedures for the Social Protection Floor for Jamaica. The costing discussion led to various proposals, such as including a framework to specify what other policy priorities the Government has besides social protection and what they would mean in terms of budget reallocation or necessary cutbacks.

The discussions highlighted the potential value of a targeted costing model of programme expenditures for correct budget planning and allocation.

Experts deployed

- ♦ **Mr. Michel Rovers**, Director of the Strategy, Policy and Research Department of the Dutch Institute for Employee Benefit Schemes
- ♦ **Mr. Derek Osborne**, former Actuary at the National Insurance Board in the Bahamas

In the words of the experts

"It is expected that key results from this mission will be:

- Greater understanding of social protection programmes in other countries
- More involvement in internal discussion of alternatives and more consideration given to new ways of doing things
- Greater scrutiny of budgets and submissions from other departments
- More informed decision making"

Mr. Michel Rovers and Mr. Derek Osborne

The view of the PIOJ

"The interaction at both events was rich and mutually valuable, as the SOCIEUX experts were able to share perspectives not only from a technical angle, but also borne out by numerous country examples from Western Europe and the Caribbean. At the same time, participants, drawn as they were from distinct areas of practice within social protection delivery, brought informed and thought-provoking perspectives to the discussions".

Ms. Collette Robinson, Manager of the Social Protection and Gender Unit at the PIOJ



Ms. Maria Lidón Nebot and
Mr. Carlos García de Cortázar

The view of the ISSEG

What did SOCIEUX's input mean for your institution and how will you apply the results?

This input meant a lot to the ISSEG. Firstly, it helped us realise what the future can hold. In this way, we will try to learn from the European and Spanish experience to prepare for various possible scenarios for the ISSEG and Mexico. Previously, we had the impression that if we could just get over the "hump" of the demographic pyramid, then servicing our obligations would be easy. However, the advice given has opened our eyes and now we know that we will face other problems. We will apply the knowledge which the experts have passed on to create the tools necessary to be able to deal with any situation. For example: advocating a legal review of the granting of insurance and pensions; scheduling periodic socio-demographic and economic studies; and, finally, maximising links with various Mexican social security entities to share knowledge and successful practices.

Mr. Aldo Baruch. Planning Director at the ISSEG

Update on Pensions in Mexico

Guanajuato, Mexico 4th to 8th August 2014.- *Through an internal assessment and training exercise, SOCIEUX supported the capacity-building of the Social Security Institute of the State of Guanajuato (ISSEG) and other Mexican pension providers*

The Social Security Institute of the State of Guanajuato is faced with the challenge of effectively managing a system of contributory pensions for their clients in an environment characterised by intense financial pressure, an ageing population and changing socio-economic dynamics. In order to strengthen its administrative model, the ISSEG recently launched the "Challenges for 2018" strategic document. In the context of the crafting of this document, a request was made to SOCIEUX for a tailor-made training course on pensions as well as an on-site assessment of ISSEG's management needs.

The exercise organised by SOCIEUX addressed, on a comparative basis, reforms of pension schemes in Mexico – at federal and state level – and in European Union Member States, with special emphasis placed on the *White Paper: An Agenda for Adequate, Safe and Sustainable Pensions*.

The event was attended by some 50 officials from the ISSEG, the National Commission for the Pension System (CONSAR), the State's Employees' Social Security and Social Services Institute (ISSSTE), the National Pension Fund for State Employees (PENSIONISSSTE), the Mexican Social Security Institute (IMSS) and other pension providers from the states of Michoacán, Zacatecas and San Luis Potosí. Undoubtedly, their involvement was crucial when it came to assessing possible improvements in the internal management of the ISSEG and, by extension, all pension providers.

According to the representatives of the ISSEG, "SOCIEUX's input was decisive in helping us to position ourselves as a link between social security institutions and in confirming our leadership, on a national level, in the area of pensions. The ISSEG reiterates its commitment to consolidating a social security system which is efficient and state-of-the-art".

Experts deployed:

- ♦ **Mr. Carlos García de Cortázar**, Assistant Director-General of Social Affairs, Education, Culture, Health and Consumer Affairs, Ministry of Foreign Affairs and Cooperation, Spain
- ♦ **Ms. Maria Lidón Nebot**, Advisor with the National Institute for Social Security, Ministry of Employment and Social Security, Spain

In the words of the experts

"Working with the ISSEG officials was both demanding and rewarding. Their technical knowledge and ability to assess the situation faced by their institution made possible the identification and analysis of problems. Their analysis chimed in with our conclusions, which ranged from undertaking certain legislative modifications to recommendations on the institution's fund management and administration. In addition, we raised the idea of setting up peer-assessment mechanisms for the different reforms undertaken by the Mexican States, similar to that in the Social Protection Committee of the Directorate-General for Employment of the European Commission".

Mr. Carlos García de Cortázar and Ms. Maria Lidón Nebot



The view of the ONPR

"We are confident that all the participants displayed a keen interest in this training by participating actively and by following its different themes closely as well as by taking as much as possible from it in order to better serve, and respond to, the great objective of "ensuring proper social security for all". We are therefore very satisfied with this course, which is going to really contribute to improving the operationalisation of social protection in general and social security in particular.

From the speech by Dr. Onesphore Baroreraho, General Director of the ONPR, at the closing of the training workshop



Practical training: M. Pancrace Gahungu, Head of the Agencies Department of the National Social Security Institute, presents a potential new pension system with SOCIEUX'S expert M. Aymeric Peltzer.

Building capacities of key stakeholders on pensions in Burundi

Bujumbura, Burundi 11th to 24th June 2014.- SOCIEUX provided support for the capacity development of the National Office for Pensions and Occupational Risk (ONPR) and other pension provision institutions through a five-day training course followed by an institutional needs assessment

In a country where only 3.8% of the population entitled to a pension effectively receives it, the recently established National Office for Pensions and Occupational Risk (ONPR) faces the challenge of efficiently managing a new contributions-based pension and professional risk schemes for civil servants. SOCIEUX responded to the institution's request for a tailored training course on pensions, followed by an on-site institutional needs assessment.

The training course dealt with various issues, from the basic ingredients of a social protection system to analysing different pension systems, actuarial methodologies and the role and tasks of a pension institution. The experts addressed the key issue of sustainability in a world of increasing longevity, focusing on the equilibrium between pensions balance and intergenerational equity. They shared the key message that "if a larger generation enters the labour market, we should not use the extra contributions to increase the current benefits but rather invest and build reserves for future ones". The course also dealt with how to manage the transition towards a contributory scheme and the importance of extending social protection to informal workers and vulnerable groups.

The workshop was attended by some 45 staff from the ONPR, the National Social Security Institute (INSS), the Permanent Executive Secretariat of the National Commission for Social Protection (SEPCPS) and the Ministry for Public Administration, Labour and Social Security. All of them took part in a practical exercise to design their own pension system based on the principles of equity, solidarity and sustainability. The result of this exercise was consensus in proposing systems that are universal, include social pensions and contain the same conditions for all professional categories. Key attendees participated in the subsequent five-day institutional needs assessment, which took into account the existing relationship between the ONPR, the INSS and the SEPCPS. It immediately became clear that it was in the interests of these bodies to "pool" their resources and means and coordinate their working methods.

Experts deployed

- ♦ **Mr. Francois Durin**, President of the French Research Centre on Social Solidarity and former director of several French retirement pension funds
- ♦ **Mr. Aymeric Peltzer**, Head of the Belgian Regional Pension Office of Brabant-Wallon and Brussels

In the words of the experts

"After a week devoted to training, almost all ONPR contributors were met, department by department, in the course of their daily work. Furthermore, working sessions were organised not only with members of the ONPR board of directors, but also with the INSS and the permanent secretariat of the SEPCPS commission for social protection. The fact that there were common or cross-cutting problems for the INSS, the ONPR and the SEPCPS led to a framing of the mission around these three bodies. Scope for improvement in the functioning of the pension system centres on the three key areas of pension fund management: *strategic management, administrative management of benefits and contributions and support functions*".

Mr. François Durin. From the Needs Assessment Report on training and technical support for the ONPR.



SOCIEUX experts Ms. Lăcrămioara Corches and Mr. Selwyn Jehoma visited the Bomi pilot SCT programme.

The view of the National Social Protection Secretariat

"Both the SCT Secretariat at the Ministry of Gender and Development and the National Social Protection Secretariat in the Ministry of Finance and Development Planning benefited from the extensive experience of the SOCIEUX experts in social protection, particularly in providing guidance for building a social protection system, identifying capacity gaps for implementing an effective social cash transfer programme and enhancing awareness of the importance and impact of social protection with examples of good practice from their countries and worldwide".

Mr. Gabriel Fernandez, National Social Protection Coordinator, Ministry of Planning and Economic Affairs

Upcoming SOCIEUX actions

Future SOCIEUX technical assistance agreed with the National Social Cash Transfers Secretariat includes conducting training workshops for its staff in the management and administration of the cash transfers scale-up. Though these actions are on hold due to the severe Ebola outbreak, social protection has been recognised as an important component in post-Ebola recovery.

Support for the scale-up of social cash transfers in Liberia

Monrovia, Liberia 14th to 25th July.- SOCIEUX undertook an institutional capacity assessment of the National Social Cash Transfers (SCT) Secretariat of Liberia with a view to evaluating the resources required to scale up social cash transfers from Bomi and Maryland counties to other most food-insecure counties. SOCIEUX experts' recommendations were presented to the National Social Protection Steering Committee, chaired by the Minister of Gender and Development.

The Government of Liberia is committed to incrementally expanding nationwide the pilot social cash transfer programme implemented in the Bomi and Maryland counties. The National Social Protection Secretariat sought SOCIEUX's support for the Cash Transfer Secretariat, responsible for implementing the scale-up, in evaluating the institutions' capacities for this expansion and in providing proposals both for improving the SCT programme itself and for reinforcing its staff.

The experts deployed by SOCIEUX reported that early indicators from impact assessments of the SCT are very encouraging as they show that the programme, which now covers close to 3800 households, has very positive socio-economic impacts. However, even though preliminary findings confirm a relatively successful implementation of the SCT programme, it is clear that the staff need to improve their knowledge, skills and competency and that the programme is highly reliant on technical assistance and funding from donors.

SOCIEUX experts conducted bilateral meetings with a wide range of social protection actors, including not only the SCT Secretariat staff, but also several line ministries, other international donors in the social protection sector as well as civil society and the beneficiaries of the programme. After a visit to the pilot SCT programme in Bomi, the experts informed us that they had had the opportunity to "witness first-hand the positive impact of the programme on beneficiaries, who also expressed to them their sincere appreciation of the programme".

The experts' recommendations were presented on 24 July at the National Social Protection Committee meeting chaired by the Minister of Gender.

Experts deployed

- ♦ **Dr. Lăcrămioara Corches**, General Director for Social Assistance, Romanian Ministry of Labour, Family and Social Protection
- ♦ **Mr. Selwyn Jehoma**, Managing Director of the South African Economic Policy Research Institute

In the words of the experts

Recommendations made by the SOCIEUX experts refer to the Social Cash Transfer programme's design, processes and structures. "Our key recommendations include strengthening the current organizational structures, identifying clear job descriptions, roles and responsibilities, and developing a robust training programme. This would enhance the capacity of the Social Cash Transfer pilot programme and provide a sustainable foundation on which to build a national one. A phased approach is advised".

On the proposed selection of counties by the Government of Liberia, the experts recommended that the scale-up be undertaken by two neighbouring counties adjacent to both Bomi and to Maryland. Together they would then become "regional hubs" of the programme.

Mr. Selwyn Jehoma



The South Asian Conference on Labour (SALC)

The South Asian Conference on Labour brought together over 250 representatives of labour and social affairs ministries from the Federal Government of Pakistan and the SAARC countries, representatives of employers' and workers' organisations, civil society, selected dignitaries from neighbouring countries and EU representatives. It is the first step towards regional collaboration to promote labour productivity and improve working conditions and rights. "We, the representatives of the Governments, Employers and Workers, from South-Asian countries (Afghanistan, Bangladesh, Bhutan [could not attend], India, Maldives, Nepal, Pakistan and Sri Lanka) do hereby recognize the need to work jointly and in close coordination to accomplish the objectives; and, for the purpose, agree to formulate and develop a regional cooperation strategy". From *the Declaration to Forge Regional Cooperation for Promoting Decent Work in South Asia*, drawn up on the occasion of the conference.



Attendees of the South Asian Conference on Labour

Providing European expertise to the South Asia Conference on Labour

Lahore, Pakistan – 24th to 26th April 2014. - *SOCIEUX provided an EU Member State Expert in Social Protection to take part in the South Asia Labour Conference organised by the Government of Punjab, to share a European overview of coordination practices*

Mr. Vit Holubec, Acting Head of Unit for the Coordination of Social Security at the Ministry of Labour and Social Affairs of the Czech Republic, participated in the "South Asia Labour Conference" (SALC) as a SOCIEUX expert in the area of coordination of social security schemes for migrant workers. The conference, a three-day ministerial-level forum, was organised within the framework of Pakistan's membership of the South Asian Association of Regional Cooperation (SAARC) by the Provincial Government of Punjab.

The SOCIEUX expert presented the European approaches and led the Social Protection technical group, which put forward its recommendations to the conference's concluding session. He pointed out the challenges in addressing the possible adverse impact of moving from one social scheme to another on the social rights of migrants. At EU level, coordination principles such as equal treatment, the application of a single law, the aggregation of insurance periods, exporting benefits and administrative cooperation between Member States are common practice. Moreover, even though the EU legislation does not replace the different national social security systems, legal instruments include several regulations on coordination, and some soft-law methods of cooperation are proving to be effective.

The conference showed that formal social security systems in the countries of the South Asian region are very limited, making the issue of real integration somewhat premature. Under these circumstances, EU social security coordination rules are not immediately applicable. However, two important concepts were considered to be relevant:

- Adopting a multilateral formal legal instrument on the protection of the social security rights of migrant workers,
- Establishment of a collaborative platform for the exchange of best practices and mutual learning like those operating within the EU: Open Method of Coordination, the European Platform Against Poverty and Social Exclusion and the Social Protection Committee.

Both suggestions were included in the recommendations to the plenary session *Endorsing the way forward*.

In the words of the experts

"Given the considerable difference between the established social security schemes of the EU Member States and the fragmented situation in the South Asian region, the existing EU practices in coordination at the international level are not fully transferable. However, certain concrete parallels can be identified and, overall, the EU achievements in the field of regional integration can serve as a success model and vision for future international cooperation within South Asia".

Mr. Vit Holubec

The view of the EU Delegation to Pakistan

"Though it is difficult to establish a direct link between the SALC and concrete outputs in terms of policy, it will surely contribute to improving collaboration and cross-fertilisation between SAARC countries, especially on labour migration and protection schemes associated with it"

Ms. Zoe Leffler, Development Advisor, Human Rights and Gender, EU Delegation to Pakistan

Ongoing and upcoming actions

Europe

- ♦ SOCIEUX is supporting the efforts of the Moldovan Ministry of Labour to set up rehabilitation services for people with disabilities. The first step of this action entailed a study visit on vocational rehabilitation services to Ireland from 29 September to 3 October. The visit was organised together with the Rehab group, the National Disability Authority and the Disability Federation of Ireland and other institutions. Further activities will include a general needs assessment for the department and capacity building of its staff.

In the upcoming months, SOCIEUX will provide support and capacity building to:

Latin-America and the Caribbean

- ♦ The Peruvian Ministry of Labour in negotiating and drafting social security agreements for migrant workers. Lima, Peru, 27 to 30 October
- ♦ The Department of Health in Colombian Cundinamarca Region in the process of formulating a public policy for the disabled. Bogota, Colombia. October 2014 to March 2015
- ♦ The Planning institute of Jamaica and other agencies in the areas of Monitoring and Evaluation of Social Protection. Kingston, Jamaica, to November

Africa

- ♦ The State Secretariat of National Solidarity in Djibouti in assessing their institutional needs to establish a Permanent Secretariat within the Social Protection Committee
- ♦ The Ministry of Gender, Children and Social Protection in enhancing the effectiveness and coordination of social protection in Ghana

On Social Protection

New project EuropeAid has recently signed a contribution agreement with the OECD Development Centre for the new project "Supporting the establishment of sustainable and inclusive social protection systems", which will be implemented in partnership with the Government of Finland. In collaboration with partner countries, the project will develop a methodology to assess the feasibility of national social protection policies and programmes and will then provide support to 10 partner countries to apply the assessment in order to make necessary adjustments to their plans for implementing national social protection policies with a view to establishing sustainable and inclusive social protection systems.

Report The World Bank launches the *State of Social Safety Nets 2014* report using data from 146 countries, which provides new estimates on social safety net programs and highlights emerging innovations.

Report The new ILO World Social Protection Report 2014-15, *Building economic recovery, inclusive development and social justice* presents the latest social security trends and finds that most people lack adequate social protection at a time when it is most needed.

Submit your request

Interested partner institutions are invited to send their requests by email, letter or fax. Requests should specify the name, position and contact details of the applicant and the government body or institution they represent, together with a brief outline of the area of assistance, needs and estimated timing. Please download the Guide for Partner Countries and Request Form from our website.

Experts: work with us

Interested social protection experts from EU Member States or partner countries public administrations or mandated bodies are invited to send their application by email, letter or fax. The application should specify the name, position, contact details and CV of the applicant and the represented public administration or mandated body. Please download the Guide for Experts and Application Form from our website.

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