

## TERMS OF REFERENCE FOR EXPERT PROVISION

### PROJECT

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<b>Project number</b>	TP-EMPL WP 17-40
<b>Project title</b>	Employment, Skills and Employability

### ASSIGNMENT SUMMARY

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<b>Title of this assignment</b>	<b>Support to National Employment Service of Serbia to expand labour market research instruments and analyses</b>
<b>Expected start date</b>	1 <sup>st</sup> July 2017
<b>Expected end date</b>	31 December 2017

## BACKGROUND INFORMATION

### 1. GENERAL: THE ETF

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The European Training Foundation (ETF) is a specialised agency of the European Union based in Turin, Italy. The ETF provides advice and assistance to the European Commission and 30 partner countries for the reform of human capital development policies under the European Union's external relations instruments. The ETF helps transition and developing countries to harness the potential of their human capital through the reform of education, training and labour market systems in the context of the EU's external relations policy.

### 2. SPECIFIC: BRIEF PROJECT INFORMATION RELEVANT FOR THIS ASSIGNMENT

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The National Employment Service of Republic of Serbia is the main producer of data and information on vacancies trends and labour demand in the country. Since 2011, a survey of employers' needs has been carried out on regular basis (annually). The research methodology has been refined over time.

The survey collects information on companies' needs for occupations, qualifications, knowledge and skills of the workforce they plan to hire in the following 12 months. One of the objectives is identification of mismatches between supply and demand in terms of education and skills. Research results inform human capital development and activation measures that in turn could reduce qualifications' gap and structural unemployment.

Field research is done with internal staff support – over 500 NES employees are involved at national and local level, while the planned coverage is 5000 enterprises, a representative sample of small, medium and large enterprises.

So far, the results of the employers' survey have been processed and interpreted, an annual report being compiled providing data on main trends in terms of vacancies and occupations in demand, key expectations of employers with regard to knowledge, competences and skills, regional distribution of future employment opportunities, etc.

The analysis includes a short term projection of labour demand. Some limitations of the instrument have been identified however, that impede a full analysis of labour market future trends. Also the resulting labour demand analysis (report) could be further expanded taking full advantage of information collected.

The authorities in charge of employment policies and programmes, i.e. Ministry of Labour, Employment, Veteran and Social Affairs (MOLVSA) and National Employment Service (NES), identified a number of aspects that could be improved as that NES survey provide a more reliable input to policy making:

- Explore missing or additional aspects of labour market analysis done yearly on the basis of employers' survey on workforce needs with a view to take full advantage of wealth of information collected and to draw more in depth conclusions and recommendations, that in turn would help a better or more tailored design of activation and skills development programmes implemented by NES or other stakeholders in Serbia;
- Check the labour market projections (i.e. occupational demand), made on the basis of employers' survey, against actual evolution of labour market demand and eventual adjustment of (short term) projection methodology (e.g. inclusion of complementary sources of data, such as Labour Force Survey, macroeconomic forecasts, additional qualitative methods to back projections etc.);

The above actions would result in a review of survey methodology for exploring employers' needs and improved labour market analyses to fully capture labour and skills demand and provide meaningful and reliable input to matching policies.

At the request of EU Delegation to Serbia, the European Training Foundation contacted the employment decision makers in the country, MOLVSA and NES, to discuss and clarify the shortcomings of current labour market research practices and needs for support. The present Terms of Reference reflect the outcomes of this consultation and foresee mobilisation of local expertise to help ETF in providing support to NES.

## ASSIGNMENT DETAILS

The objective of this assignment is to review the labour market research methodology (employers needs' survey) and resulted labour demand analyses (reports), propose recommendations for improvement of survey methodology and analysis and propose amendments of short term projection.

For this purpose, the ETF will recruit a **National Expert Cat II** and, in cooperation with NES, provide all the background information, documents and access to relevant databases. The national expert will have to comply with applicable privacy and confidentiality rules when accessing NES database.

### Activities

**The contract of National expert will include a number of 25 working days and will cover the following activities:**

#### **Activity 1 – Employers' survey and labour market analyses**

- Review the database of information collected through employers surveys done in 2014, 2015 and 2016, and labour market analysis reports from respective years.
- Provide recommendations for improvement of the questionnaire and employers survey implementation methodology;
- Provide recommendations for improvement of data analysis, including additional areas and methods of data interpretation to support drawing more in-depth conclusions and policy recommendations;
- Propose a revised structure and indicative content (outline) of labour market analysis reports;

#### **Activity 2 – Projection methodology**

- Evaluate whether labour market projections for 2015 and 2016 (done on the basis of employers' survey) reflect key trends registered in the respective years, using for example results of Labour Force Survey, macroeconomic and other relevant data sources;
- Propose amendment of projection methodology (e.g. inclusion of complementary sources of data, such as Labour Force Survey, macroeconomic forecasts, additional qualitative methods to back projections etc.);

The expert is expected to meet regularly NES designated coordinators and access NES database (at NES premises), in line with applicable rules.

## **3. ASSIGNMENT DELIVERABLES**

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The Contractor is responsible for monitoring all deadlines and transmission of deliverables to ETF. The selected expert is responsible for respecting agreed deadlines and production of deliverables in English and Serbian. The selected expert and ETF will ensure that the Contractor is in copy in any email exchange regarding adjustment of deadlines, submission and approval of deliverables.

The selected expert is requested to produce the following deliverables:

1. Report on review findings and recommendations for improvement of survey questionnaire, implementation methodology and improvement of data analysis, including a revised outline of labour market analysis reports – around 25 pages, excluding annexes, in English and Serbian (first draft 5<sup>th</sup> August; final report 31<sup>th</sup> August 2017);
2. Report on comparison results between labour demand projections and actual evolution of labour demand, including concrete recommendations to amend the projection methodology –

around 20 pages, excluding annexes, in English and Serbian (first draft by 20<sup>th</sup> September; final report by 15<sup>th</sup> October 2017)

Deadlines may be adjusted in consultation with the ETF and NES.

#### 4. EXPERTS' ACTIVITIES, WORKING DAYS AND RELATED TRAVEL

In order to provide to ETF the requested deliverables, the expert will carry out the below activities expressed in man-days of work.

1 National expert Cat II			
Description of the work	Place	Date (tentative)	N° of work days
1. Review employers needs' survey and labour market analyses, including draft a report on key findings and recommendations (Activity 1)	Home based and NES headquarter (Belgrade)	First draft 5 August; final by 31 August 2017	14
2. Review labour demand projections and actual labour market trends, including draft a report summarising results and propose amendment of projection methodology (Activity 2)	Home based and NES headquarter (Belgrade)	first draft by 20 <sup>th</sup> September; final by 15 <sup>th</sup> October 2017	11
<b>TOTAL</b>			<b>25</b>

*Reimbursables: for travel expenses (if applicable), translations, printing of materials, other related services, as requested.  
The budget for reimbursables will be managed and used following the procedures in place. The prices for these services will be agreed with the ETF in advance and the costs will be reimbursed to the contractor upon submission of related supporting documents.*

400 EUR

*N.B. In execution of the activities, in all contacts with third parties the selected expert(s) will safeguard the reputation of ETF and will inform ETF (through their contractor) of any situation that may put its reputation or achievement of its work programme objectives at risk.*

#### 5. PROFILE OF THE EXPERTS

The ETF requires the below expert profile to carry out this assignment. CVs will be assessed according to this profile.

Expert profile N° 1 National Expert	
ETF requests CVs of <b>national</b> experts of Category II (5-10 years of experience)	
CVs received that fulfil these basic requirements will be assessed according to the following criteria:	
Criteria 1. Specific area of expertise required	<p>Extensive knowledge and experience of approaches and methodologies for conducting labour market demand and enterprise surveys, as well on labour market analysis</p> <p>Experience in implementing surveys, including hands-on expertise in questionnaire design and analysing survey data and statistics</p> <p>Experience in forecasting labour market trends and/or occupational demand</p>

	Knowledge and experience required above should be proven by relevant reports and/or research projects and consultancy assignments
Criteria 2. Country specific knowledge/ experience	Experience in similar assignments supported by national or international partners and organisations in Serbia
Criteria 3. Drafting / presentation skills	Good drafting and analytical skills, proven by a list of policy reports and/or research papers
Criteria 4. Language skills	Excellent English, reading, written and spoken (C1 level) Excellent Serbian, reading, written and spoken (C2 level/mother tongue)

With a view to ensuring continuity of project implementation, effective achievement of work programme objectives and efficient use of resources, ETF may propose to continue to work with the same selected expert(s) in a new closely related assignment under subsequent activities/phases of the same project, provided an identical expert profile is required. Proposal of such a continuation is at the discretion of the project team, subject to successful completion of all activities/deliverables on the part of the expert(s) in this assignment, and upon approval of ETF work programme and related budget. Any such new assignment will be implemented through the same Framework Contractor and will be confirmed only upon issue of a new signed order form.

## **6. BUDGET & PAYMENTS**

The maximum assignment budget will be that quoted by the contractor in its financial offer and subsequently stated on the signed order form.

**The contractor must take into account the following in the preparation and use of the budget:**

- The Contractor is requested to provide ETF with a detailed budget proposal based on the agreed fees in the framework contract and the specific needs of the assignment as outlined above.
- **For expert fees:** Any proposed changes to the distribution and/or total number of expert working days must be justified and agreed in writing with ETF before the changes take effect.
- **For expert travel/missions:** In the case of expert travel outside of the place of residence, the contractor must provide ETF with proposed travel schedules and price, indicating the number of per diem this would imply, for ETF to give its approval before travel takes place. (Calculation of the number of per diem to which experts are entitled is decided by ETF based on the number of nights spent away from the place of residence for the purpose of the assignment.)
- **For all reimbursable items:** The Contractor should always endeavour to find the best value for money for travel, meeting venues, accommodation, or other costs related to individual assignments.
- The budget may include a reserve up to a maximum equivalent to 5% of the total budget. The use of the reserve will need to be justified and approved in advance in writing by ETF.

**Payments will be made as follows:**

One final payment 50% final payment within 60 days from receipt of the invoice upon approval of final deliverables. **OR** in case of order forms of a value €25,000 and above

- 50% pre-financing payment upon receipt of a correct invoice/request for payment
- 50% final payment within 60 days from receipt of the invoice upon approval of final deliverables

## **7. REPORTING BETWEEN THE CONTRACTOR AND ETF**

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**7.1** The contractor will ensure the provision of **the Deliverable(s)** produced by the expert(s) as described under point 3. above, within the specified deadlines. In accordance with the framework contract, the contractor will ensure that all deliverables undergo a quality check from a language point of view and where relevant, language will be improved before sending to ETF.

**7.2** The contractor will ensure that regular communication is kept with ETF, in English by phone and email, as necessary to ensure clarity on the progress of the assignment and that **the following reports are provided to ETF within the deadlines stated:**

- **Assignment deliverables:** The contractor will ensure that all deliverables, produced by experts for specific assignment are supplied to the ETF in high quality English (and/or other specified language) in accordance with the TOR and within stipulated deadlines. Deliverables (reports, studies, survey, slides etc.) must be produced following the ETF Guide for Authors which can be found on <http://www.etf.europa.eu/authorssite.nsf/>
  - **Assignment closure reports:** Upon completion of each assignment, the Contractor must provide to ETF:
    - a) A brief technical report describing – as applicable- achievements, deliverables, any specific problems or risks in the course of the assignment and
    - b) A financial report and final invoice, in Euro, for the cost incurred under the assignment. The financial report will consist of a clear numbered list in English of working days and other expenses claimed per expert accompanied by document to support amounts claimed. Supporting documents for working day fees and for per diem: time sheets signed by experts and contractor; for international travel: a copy of the ticket clearly showing price and original passes; for other reimbursable items: original invoices and receipts.
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