



TAIEX - Guide for EU Public Sector Experts

TAIEX stands for **Technical Assistance and Information Exchange**. It is an instrument of the European Commission, which provides short-term, peer-to-peer assistance to government administrations in eligible beneficiary countries so as to support them, where appropriate, in:

- the understanding of,
- the convergence with,
- the approximation with,
- the alignment with,
- the implementation of,
- and the enforcement of

the EU *acquis* (i.e. the entire body of EU Law), EU policies, EU best practice and EU standards.

A. Types of events and role of the expert

Workshops:

The purpose of a workshop is to present aspects of the EU *acquis* to a wider audience (usually more than 20 participants) as well as to explain any legislative issues. It may be thematic and relate to the *acquis* in substance, or it may be more practical dealing with the implementation and the enforcement of the EU *acquis*.

Workshops typically involve more than one expert from more than one EU administration and usually last one to two days depending on the needs. The workshop has a single beneficiary or multiple beneficiaries (multi-country workshop).

Workshops can be organised in person in a beneficiary country or EU Member State, online or in a hybrid modality (in-person attendance of a limited number and online participation combined).

The expert is expected to attend and contribute to the workshop by making presentations and taking part in the general discussions for the entire duration of the event.

An expert can also be asked to act as a chairperson to moderate the discussion.

Within 15 days from the end of the event, the expert will complete a report of the workshop. See next sections for details.

Expert Missions:

Expert missions typically consist of sending EU expert(s) on a mission to a beneficiary country in order to provide advice and guidance to the beneficiary institution(s) in a specific field. The expert mission lasts usually up to five days and provides an opportunity to discuss draft legislation, present examples of best practice and lend concrete assistance to a limited audience (usually up to 20 participants).

The expert is entrusted with the task described in the agenda, which is developed in co-operation with the beneficiary/recipients' institution and TAIEX. Within 15 days from the end of event, the expert will draft a report describing if the objective of the mission was attained, the situation of the beneficiary/recipients' institution and recommendations. See next sections for details.

Expert missions can also be organised online or in a hybrid modality.

Work from Home:

Work from Home is requested by TAIEX in case more substantial examining or assessing needs to be undertaken prior to or after an event (workshop, expert mission, study visit). In this case, TAIEX will agree with an EU expert on the specific topics and the scope, including on financial compensation, of the work from home.

Transmission of presentations/speeches and evaluation:

For workshops and expert missions, experts will send by email to TAIEX a copy of their presentation/s (PowerPoint format) or speaking points (MSWord format) in the working language of the event no later than five working days before the starting date. Prior to the event these documents will be shared with interpreters to facilitate their work and preparation. By accepting a TAIEX assignment and its personal data privacy notice, the expert gives consent to the publication – electronic or in other forms – of his/her contribution (presentation/s/speech/es) on the TAIEX website:

<https://webgate.ec.europa.eu/TMSWebRestrict/resources/js/app/#/library/list>.

Should an expert disagree with the publication, the expert needs to inform TAIEX about this immediately, as per the privacy notice. See the last section for details.

Experts are requested to ensure that their presentation/speech does not contain any material for which they have no rights to authorise reproduction or distribution. Please note that the presentation/speech should not contain the European Commission or the TAIEX logo and should not exceed 10 MB.

The expert should submit his/her report within 15 days from the end date of the event. The report needs to be substantial, with a clear description of the sessions, the outcome of the events and possible recommendations as regards remaining issues to be fixed / improved as well as areas or topics, which could be covered in follow-up activities (be it TAIEX, Twinning, Technical Assistance support etc). The report will not be published on the website but can be shared with the beneficiary administration and/or European Commission services.

After the end of the event, the expert is requested to provide feedback via an online questionnaire on his/her satisfaction with the event, including the logistical aspects, the participation of the beneficiary/recipients' institution, the results achieved and the possible further assistance needs. Experts' opinions matter to us as it will provide useful input for improving future TAIEX assistance.

B. Financial compensation

As a general rule, TAIEX may grant a Per Diem according to the established rates applicable to the place to be visited. The Per Diem is a daily subsistence allowance to cover accommodation, meals, local transportation and sundry expenses. The costs of accommodation and meals directly provided by TAIEX or by third parties are automatically deducted from the total amount of Per Diem paid to the expert.

With regard to experts mobilised from their public administrations, TAIEX may also grant a Flat Daily Allowance (FDA) of €350 per working day, and additional FDAs for writing and submitting a report and for preparatory work. The scope and the content of reporting and preparatory work is to be defined by TAIEX, and depends on the agenda and the ambition of the event.

With respect to travel days falling on a working day, if the flight on the day of departure is scheduled to leave:

- before or at 2.00 pm, full FDA is applicable;
- after 2:00 pm, half FDA (€175) is applicable;
- after 6:30 pm, no FDA is applicable.

Similarly, on the day of return if the flight is scheduled to arrive:

- before 9:00 am, no FDA is applicable;
- before 12:00 am (noon), half FDA (€175) is applicable
- after or at 12:00, full FDA is applicable.

Exceptions can be made if experts work in a city different to that in which the airport is located. If an event takes place during a weekend, these days count as working days as well (except if weekend days are travel days).

Any proof of payment for claiming reimbursement shall be submitted no later than 30 days of the end date of the event together with original supporting documents. If the original tickets and proof of purchase sent to the service provider within the deadline stated above are scanned copies, experts are reminded that they must keep the originals for five years.

Payment of any additional FDA to experts mobilised for a mission, including peer-review mission and workshops, for drafting of their mission report shall only be undertaken upon the submission of the report to TAIEX. Failure for experts to submit a mission/workshop report in 30 days may have consequences on the payment of this additional FDA. TAIEX may request a Work from Home in case of more substantial preparatory or reporting needs.

In the event that you are not a public sector expert in active public service – either temporarily, because you are taking prolonged leave of absence – or permanently, because you left your administration or you are retired, please inform TAIEX immediately as the rules covering your engagement with TAIEX differ. Please see or request the guide for private sector experts in this case.

C. Practical arrangements

TAIEX relies on an external service provider for the organisation of the logistical aspects. The service provider will, in principle, arrange all international transportation, accommodation, conference venues, interpreters and other logistical arrangements necessary for the organisation of the event. Please note that email is the preferred method of communication, and all emails regarding an event should include the five-digit event reference number.

To start off the preparation of the event, TAIEX will send the link for online registration, which needs to be submitted by the speaker at the latest four weeks before the start date of the event.

When completing the online registration attention should be paid to the following:

- All fields marked in red must be provided, otherwise the registration cannot be accepted;
- All data must be in English only;
- All names must be written with Latin letters;
- Accents or other symbols such as (), ", *, ' must not be used;
- Title Case (only use capital letters to start the principal words) is to be used (not lower and uppercase);
- Full and accurate job titles have to be provided;
- Only the following titles can be used: Ms, or Mr (no Prof., Dr. etc. can be accepted);
- No abbreviations will be accepted;
- Surnames and names have to be encoded exactly as written in the passport of the participants;
- One valid email address, preferably a professional email address as opposed to a private email address (Yahoo, Gmail, Hotmail, etc.), and phone numbers, including a mobile phone number (for use in case of emergency), have to be provided;
- Full and accurate address and contact details (street name and number, city and postal code) as well as name and address of bank, the name of the beneficiary account holder, IBAN code and SWIFT/BIC code have to be provided;
- The preferred method of Travel and Airport of Departure as well as the need for a hotel to be booked are also requested to be provided.

In all cases, it is of the essence to follow the formatting and to ensure a correct encoding.

Before accepting participation in a TAIEX event, the European Commission strongly advises you to check the security/travel advice issued by the national authorities of your country of residence and to take all necessary measures in that respect.

You are kindly reminded that when on a TAIEX mission, you remain under the responsibility of your own administration.

1. Travel and accommodation arrangements

International travel and accommodation arrangements are organised by the service provider - i.e. booking flights, issuing tickets, hotel reservations.

The service provider will book a 4-star (if available) international standard hotel, covering the duration of the event and as required by the travel schedule.

Important: the service provider will not finance or reimburse any other arrangements made by the expert unless written authorisation from TAIEX is obtained in advance.

2. Travel options

Flights: flight tickets are arranged and purchased by the service provider. The service provider will select fares and flight times, which offer the best value for money according to pre-defined standards. Departure and return times shall be as close as possible to the starting and ending times of the event, according to the agenda. In line with the principle of sound financial management of public funds, the least expensive ticket should be chosen unless there is a specific professional or personal/family justification for a different choice. If the participant nevertheless insists on a more expensive travel option than the one proposed, the difference between the costs of the two flight options shall be deducted from the Per Diem.

Train: TAIEX will either book and purchase train tickets, or reimburse the real cost of the ticket purchased by the expert upon receipt by the service provider of the original tickets and a proof of purchase. Experts may travel in "first class" except on high-speed trains such as TGV, Thalys or Eurostar, where "second class" tickets shall be booked. A premium tickets can be used only if this ticket is not more expensive than a "first class" ticket, or in the case of high-speed train services, not more expensive than "second class" tickets.

Other means of transport: only under exceptional circumstances and if written agreement is obtained from TAIEX in advance.

3. Visa arrangements

The expert should check before the visit whether s/he will need a visa or not and if his/her passport/ID meets the required validity period. Experts are solely responsible for making all the necessary arrangements for obtaining their visa in due time.

If needed to support the visa application, experts should request TAIEX to issue an invitation letter as soon as possible. However, TAIEX will not contact Embassies or Consular Offices directly on behalf of experts.

Upon request, and subject to the prior agreement of TAIEX, all costs related to obtaining the visa (excluding health insurance, unless obligatory for visa, but including travel costs, if relevant, and any fees incurred by private companies in relation to obtaining the visa in cases when it is compulsory to use such services) can be entirely reimbursed upon receipt of original ticket invoices and proof of payment within 30 days of the end date of the event.

4. Confirmation letter

A confirmation letter providing information about travel arrangements, accommodation, the Per Diem and other practical details, including an emergency contact number, is provided by the service provider shortly before the event and can be used as proof of attendance.

In principle only electronic tickets are issued (no paper tickets). Boarding passes are to be collected at the

check-in-desk of the respective airline at the airport of departure.

Unless stated otherwise, accommodation and international transportation are paid by the service provider. If any additional payments for either accommodation or international transportation are requested, the service provider shall be contacted immediately.

In case of an emergency regarding travel or accommodation, outside office hours, please contact the service provider emergency number as indicated in the confirmation letter. For emergency during office hours, please contact the service provider's event organiser (*i.e.* the person who organised your practical arrangements).

5. Change of issued flight ticket's dates and/or routing

Issued flight tickets are not transferable and no changes will be made in routing or dates.

If the outbound part of a return-ticket is not used, the inbound part will automatically be cancelled by the airline. If you cannot board the outbound ticket please inform the service provider immediately in order to minimise the financial loss caused by your 'no-show'.

6. Steps to follow if the expert's participation needs to be cancelled

Should an expert not be able to attend, s/he must immediately contact TAIEX and the service provider to explain the situation. S/he should make sure that TAIEX is informed and confirms receipt of the message.

Please note that, in case the expert is not able to take the flight, part of the flight price can be recoverable if the expert informs the service provider prior the departure time of the flight.

The expert needs to return to the service provider any travel tickets or payments received. Further details of the procedure will be provided if this situation arises.

7. Transfer of Per Diem and FDA

The service provider will, in principle, transfer Per Diem and FDA payment to the bank account(s) indicated by the expert within 20 working days after the end of the event. The cost of the bank transfer is paid by TAIEX, unless otherwise agreed. Full and accurate bank details shall be provided to ensure that the transfer is executed without delay. The Swift/BIC Code and/or the IBAN number shall be indicated as these are mandatory for payments within the EU Member States. Without this information, no payment can be made to the experts.

8. Additional expenses to be paid by the expert

The costs of private telephone calls and all other personal expenses are not reimbursed by TAIEX.

9. Local transport expenses at the event venue

The costs of local transport (*e.g.* from the airport/train station to the conference venue and back) are not reimbursed by TAIEX.

On an exceptional basis taxi fares related to international travel may be reimbursed if no public transport is available (*e.g.* for transfers between Larnaca Airport and Nicosia) or if safety and/or health reasons so advise, and only upon receipt of a duly completed and signed expense report and the original taxi bill within 30 days of the end date of the study visit. In these cases, prior written agreement from TAIEX is needed.

10. Local transport expenses in the expert's home country

If there are any additional transport costs in the home country of the expert linked to international travel, TAIEX should be notified as soon as possible. The costs may be reimbursed to the experts if duly justified and upon prior agreement by TAIEX.

Taxi fares linked to international travel may be reimbursed to experts in the following cases:

- To and from the airport/station/port, if no public transport is available;
- For transportation leaving before 8 am and arriving before 8 am or after 11 pm.

Reimbursement of local transportation costs will be processed only after receipt of a duly completed and signed expense report and the proof of payment and original tickets, where applicable, within 30 days of the end date of the event.

11. Insurance arrangements

TAIEX does **not** provide any insurance, e.g.:

- Travel;
- Coverage for health care costs due to sickness and accident (in-patient and emergency out-patient);
- Emergency repatriation;
- Transportation to medical centre;
- Sending of a medical service provider;
- Emergency dental care costs;
- Death, repatriation of the body to the place of origin.

Insurance costs will not be reimbursed by TAIEX.

TAIEX and the service provider shall be under no liability in respect of sickness, accident or medical expenses incurred by the experts in connection with their assignment. This includes also capital indemnity in case of death or invalidity due to accident or sickness/illness.

12. Technical equipment

For in-person workshops, technical equipment is organised by the service provider.

13. Event attendance

For in-person workshops, participants and experts also need to sign on a signing-in attendance list, which needs to be signed every day of the event in the morning and in the afternoon. The photographing or copying of the list is prohibited. For any persons who do not wish to have their names included on the list, alternative arrangements may be put in place; affected persons should inform the TAIEX Project Officer at the time of registration.

Experts are expected to stay throughout the entire event and should not leave for other purposes. Any unauthorised absences may lead to an adjustment of the Per Diem and the FDA.

14. Evaluation

After the event, experts will be requested to provide feedback via an online questionnaire on their satisfaction with the outcome of the event, the logistical aspects and possible further needs for assistance.

15. Reimbursement

If a travel ticket or any other cost is to be reimbursed, it must be agreed in advance with TAIEX. A duly completed and signed expense report and supporting documents (original tickets and proof of payment) should be provided to the service provider within 30 days of the end date of the workshop. Complete bank account details, including the full account name, SWIFT code, IBAN code, and address of the bank should be provided.

If the original tickets and proof of purchase sent to the service provider within the deadline stated above are scanned copies, participants must keep the originals for five years.

D. Personal Data Protection

Personal data related to the LCO, participants and experts will be processed in accordance with the privacy statement of the TAIEX instrument:

[Twinning and TAIEX privacy statements \(europa.eu\)](https://ec.europa.eu/taxation_customs/taieex/privacy-statement)

and in compliance with Regulation (EU) 2018/1725, of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC.

Please note that according to the above privacy statement, experts agree to share their personal data with the Commission, the participants and the organisers.

The Commission and the logistic provider keep the personal data in an IT application (TMS) and share as little as possible of this data with other parties involved in the event. Sensitive personal data is deleted after 6 months after the event, while other personal data is not available for any processing after five years.

If any personal data, such presentations, photos, or web-stream are made publicly available, a special agreement will be sought.

With regards to the above, the following arrangements should be noted:

- The chairperson of the TAIEX event is asked to advise all persons attending the event that photographs/pictures should only be taken during a set period of time to allow those persons, who do not agree to have their photograph taken, to leave the room; unless all of the attendees agree to having their photograph taken.
- In the case of live web streaming and video recording, the alternative to the participants attending the event is to provide them with the opportunity to watch the live web streaming or the opportunity to watch the video of the event.
- Experts are advised that the presentations made at workshops or expert missions are made available to a wider audience through the TAIEX website, unless they object to it.
- Participant and experts are also advised that the agenda, which may include the name of both participants (mainly study visits) and experts (all events), is also made available through the TAIEX website. Participants, who do not wish to have their name included on the agenda, should inform the TAIEX Project Officer at the time of registration or before the preparations of the event have been concluded.

The names of all participants and experts are also included on a signing-in attendance list which needs to be signed by the participant or expert as relevant. This list is stored in TMS and available only to the Commission and the contractor. The photographing or copying of the list is prohibited. For the persons who do not wish to have their names included on the list, alternative arrangements may be put in place with the LCO or the Host Institution of the event.

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