

14 January 2021

**Call for expression of interest:**  
**EIOPA Practitioners Network on Pension Tracking Systems**  
**Application Deadline: 31 January 2021**

EIOPA is setting up a Practitioners Expert Network on Pension Tracking Systems (hereafter: the Network). The aim is to strengthen and complement EIOPA's expertise with regard to the internet-based applications that provide citizens with an overview of their future retirement income, based on their entitlements from all pension schemes in which they participate.

The expertise gathered from the Network should benefit current work of EIOPA to identify best practices for the set-up of a National Pension Tracking System tool following the [call for advice made by the European Commission](#). In this regard, EIOPA will provide technical advice on several items, ranging from the front-end of the tracking tool (i.e. its functionalities, presentation and user experience), to the back-end of the tool (i.e. the technical aspects such as data inputs, collection of data, governance of the framework, etc.), in addition to the legal aspects. This policy work has to be finalised by 1<sup>st</sup> December 2021.

**Description of the main tasks**

The Network would meet and discuss regularly to share technical expertise and evidence with the Project Group responsible for drafting the Technical Advice in particular with regard to the following:

- the mapping of functional features for the individual to have a simple, attractive and comprehensive view of his/her income at retirement;
- the outline for the presentation of the information in the tracking tool, including the summary of key information;
- an appropriate implementation approach for launching the tracking tool and the accompanying communication initiatives;
- the identification of the relevant data points from pension products across the different sources (i.e. state-run pensions, occupational pensions, personal pensions, etc.) and the relevant sources/entities;
- the design, set-up costs and governance of the framework, including parties responsible for holding of data, the interface for accessing the system, etc.
- ensure the consistency in the estimates and projections of an individual's financial position at retirement;
- ensuring the interconnectivity with the European Tracking Service (ETS);
- the main barriers encountered and lessons learnt from previous pension tracking systems;
- aspects in relation to data security, GDPR considerations and other risks.

## **Selection criteria and selection process:**

The members of the Network are expected to be highly knowledgeable professionals with extensive practical experience with the design, use and/or management of pensions tracking system tools developed both within and outside the European Economic Area. In particular, EIOPA seeks representatives from public entities, pension funds associations, companies, non-profit organisations and the European Tracking Service (ETS).

Candidates should have proven competences and professional experiences, including:

- Technical knowledge and practical experience with internet-based information tracking tools and/or digital solutions.
- Experience with developing national tracking tools across or outside the EU.
- Knowledge of pension schemes and products, their information requirements and their main features.
- Experience in working in an international, cross-sectoral environment.
- Excellent command of English – both oral communication and writing skills.

Members of the Network will be chosen based on their personal merits and are expected to express their own personal views rather than representing their respective organisations or Member State. They are bound by confidentiality requirements regarding any non-public information that will be shared with them while performing their tasks.

The Network is expected to be an active, small forum, based on a high individual engagement of its members, and will entail a significant commitment by the members in terms of time and efforts to be spent.

The working language is English.

One should expect to participate in several meetings (up to six meetings) or video calls on a frequent basis. Given the pandemic situation, most of the meetings will be held virtually. Should the situation improve substantially, EIOPA could decide to hold one or two physical meetings in its premises.

Generally, travel expenses are not reimbursed and there will not be any compensation for services provided by the members of the Network. Members representing consumer organisations or academia may be eligible for reimbursement of travel expenses according to EIOPA's policies.

Members are selected for a one year term, to kick-start from the date of the appointment. As the work could continue over the next year, the membership can be consecutively extended for one more year, taking into account the progress of the work and the priorities.

**Application procedure:**

Interested experts are invited to submit their application (in English), which shall contain:

- a cover letter explaining the applicant's motivation for answering this call and stating the relevant expertise; and
- a Curriculum Vitae (CV)

Applications must be submitted by email to [pensions@eiopa.europa.eu](mailto:pensions@eiopa.europa.eu) no later than **Sunday, 31 January 2021 23.59 CET**.

EIOPA can only accept applications from individuals (natural persons), not organisations. Alternates of the Practitioners' Network members will not be allowed. Candidates, who are not selected initially, may be placed on a list of experts with the possibility to become a member of the Network at a later stage.

For any further information please contact: [pensions@eiopa.europa.eu](mailto:pensions@eiopa.europa.eu).