

NATO PARTNERSHIP FOR PEACE  
PROJECT FOR ASSISTANCE TO DISCHARGED DEFENCE PERSONEL  
WITHIN THE SCOPE OF DEFENCE SECTOR REFORM IN SERBIA

# PRACTICE NOTE ON SOCIO-ECONOMIC REINTEGRATION OF REDUNDANT DEFENCE PERSONEL



Project funded through a  
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and Implemented by  
the International Organization for Migration - Mission to Serbia



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**NATO PARTNERSHIP FOR PEACE**  
Trust Fund Project for Assistance to Discharged Defence Personnel  
in the Republic of Serbia

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PRISMA

Programme for Resettlement  
in the Serbian Ministry of Defence  
and Armed Forces  
**“PRISMA”**  
Directorate for Resettlement



IOM • OIM

International Organization  
for Migration  
**(IOM)**  
Mission to Serbia

## **PRACTICE NOTE**

### **ON**

## **SOCIO-ECONOMIC REINTEGRATION OF REDUNDANT DEFENCE PERSONNEL**

A PROJECT OF THE NATO - *PARTNERSHIP FOR PEACE* (NATO - *PfP*)  
IN SUPPORT TO  
SERBIA'S RESETTLEMENT PROGRAMME

# TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b>	<b>2</b>
<b>ACRONYMS AND ABBREVIATIONS</b>	<b>4</b>
<b>PREAMBLE</b>	<b>6</b>
<b>INTRODUCTION</b>	<b>7</b>
<b><u>1. PRINCIPLES OF DEFENCE REFORM AND THE IMPORTANCE OF RESETTLEMENT PROGRAMMES</u></b>	<b>9</b>
<b>1.1 AN OVERVIEW</b>	<b>9</b>
<b>1.2 IOM APPROACH TO THE DEFENCE REFORM PROCESS</b>	<b>10</b>
<b>1.3 REQUIREMENTS FOR EFFECTIVE DEFENCE REFORMS</b>	<b>11</b>
HOST NATION BUY-IN	11
INTERNATIONAL SUPPORT	12
LEGAL FRAMEWORK	13
<u>LESSONS LEARNED AND BEST PRACTICES</u>	13
<b>1.4 A STABILIZATION, PEACE-BUILDING AND DEVELOPMENT CATALYSER</b>	<b>14</b>
STABILISATION	14
PEACE-BUILDING	16
DEVELOPMENT AND ECONOMIC SUPPORT	16
<u>LESSONS LEARNED AND BEST PRACTICES</u>	17
<b><u>2. THE SERBIA EXPERIENCE</u></b>	<b>19</b>
<b>2.1 MOD HR STRUCTURE PRIOR TO REFORM</b>	<b>19</b>
<b>2.2 LEGAL FRAMEWORK DETERMINING RESETTLEMENT AND ASSISTANCE</b>	<b>21</b>
LAW ON THE SERBIAN ARMED FORCES	22
LAW ON CIVIL SERVANTS	23
LABOUR LAW	23
REGULATING AND ESTABLISHING THE RESETTLEMENT DIRECTORATE	23
<b>2.3 THE RESETTLEMENT PROCESS: MOD AND STAKEHOLDERS</b>	<b>25</b>
INITIAL PRECONDITIONS FOR OPERATIONALISING PRISMA	25
CONTEXTUAL REALITIES	26
ESTABLISHMENT OF A PROGRAMME IMPLEMENTATION COUNCIL	26
LABOUR MARKET SURVEY	27
<b>2.4 PUBLIC INFORMATION CAMPAIGN: STRATEGIC DESIGN &amp; IMPACT</b>	<b>28</b>
<b>2.5 PRISMA'S ORGANISATIONAL STRUCTURE AND COMPOSITION</b>	<b>30</b>
OPTIMAL CONFIGURATION OF PRISMA	31
STAFF COMPOSITION TRAINING, AND PROCESSING CAPACITY	31
ESSENTIAL COMPONENTS FOR A RESETTLEMENT PROGRAMME: 11 COMPONENTS OF THE PRISMA APPROACH	34
<b>2.6 RESETTLEMENT NEEDS ASSESSMENT</b>	<b>39</b>
<b>2.7 PRISMA: PROGRAMME IMPLEMENTATION</b>	<b>41</b>
APPLICATION FORM	42
ORIENTATION	43
RETRAINING FOR THE CIVILIAN WORLD	44

ADDITIONAL SUPPORT	45
<b><u>3. NATO - PARTNERSHIP FOR PEACE TRUST FUND FOR SERBIA</u></b>	<b>47</b>
THE TRUST FUND MECHANISM	49
3.1 ASSISTANCE TO REINTEGRATION	51
3.2 THE INFORMATION, COUNSELLING AND REFERRAL SERVICE (ICRS)	52
THE ICRS MECHANICS	52
INFORMATION TO BENEFICIARIES	53
DISSEMINATION OF INFORMATION TO STAKEHOLDERS	54
THE OUTREACH AND INFORMATION DISSEMINATION STRATEGY IS A KEY TOOL TO DISSEMINATE INFORMATION ABOUT THE PROJECT AND PROMOTE AWARENESS WITHIN THE MOD, AMONG POTENTIAL CANDIDATES ALREADY MADE REDUNDANT, AS WELL AS TO THE LOCAL GOVERNMENT AND BUSINESS COMMUNITIES. ADDITIONALLY, WITHIN THE FRAME OF THE INFORMATION DISSEMINATION STRATEGY, THE PROJECT HAS BEEN ABLE TO CONTRIBUTE TO THE PROMOTION OF THE POSITIVE IMAGE OF THE NATO - PARTNERSHIP FOR PEACE IN THE COUNTRY.	54
VISIBILITY	55
COUNSELLING "CHANGING MINDS" APPROACH	55
COUNSELLING TO MANAGE EXPECTATIONS:	57
REFERRAL SERVICES (RS)	57
THE ICRS REINTEGRATION FUND (ICRS RF)	58
SOCIO-ECONOMIC REINTEGRATION	59
LEGAL ADVICE	61
3.3 MONITORING AND EVALUATION	62
MONITORING INDIVIDUAL ICRS-RF PROJECTS	62
EVALUATING ICRS PROGRAMMES	63
3.4 TRANSPARENCY AND ANTI-CORRUPTION MEASURES	64
DONOR VISITS	65
<b><u>4. CAPACITY DEVELOPMENT OF GOVERNMENT INSTITUTIONS</u></b>	<b>67</b>
4.1 JOINT REVIEW PANEL	67
4.2 TRAINING ACTIVITIES	68
4.3 REFURBISHMENT AND EQUIPMENT OF OFFICES	68
4.4 UPGRADE OF THE IT SYSTEM	69
4.5 BUSINESS INCUBATORS	69
<b><u>5. CHECKLISTS</u></b>	<b>72</b>
5.1 CHECKLIST FOR PLANNING	72
5.2 CHECKLIST FOR DIRECT ASSISTANCE (ICRS & RF)	74
5.3 CHECKLIST FOR CAPACITY DEVELOPMENT AND EXIT STRATEGY	75
6.1 GENERAL CONCLUSIONS	76
6.2 SPECIFIC NTF-RELATED CONCLUSIONS	77
<b><u>7. ANNEXES</u></b>	<b>78</b>

## ACRONYMS AND ABBREVIATIONS

ABF	Academy of Banking and Finance
BICC	Bonn International Centre for Conversion
CPE	NATO Contact Point Embassy
CTP	Career Transition Partnership
DCAF	Geneva Centre for the Democratic Control of Armed Forces
DDR	Disarmament Demobilisation and Reintegration
EACP	Euro-Atlantic Partnership Council
EU	The European Union
FYROM	Former Yugoslav Republic of Macedonia
GDP	Gross Domestic Product
GoS	Government of Serbia
HR	Human Resources
ICRS	Information Counselling and Referral Services
IOM	International Organization for Migration
JRP	Joint Review Panel
LEPEZA	Macedonian Resettlement Programme
MBS	Manchester Business School
MoD	Ministry of Defence
MoU	Memorandum of Understanding
NATO	North Atlantic Treaty Organization
N.B.	Nota Bene, Latin expression meaning "note well"
NCOs	Non-Commissioned Officers
NES	National Employment Service
NGOs	Non-Government organizations
NTF	NATO - <i>Partnership for Peace</i> Trust Fund
OJT	On-the-Job Training
PfP	Partnership for Peace
PI	Public Information
PMU	Project Management Unit
PRISMA	Programme for Resettlement in the Serbian Ministry of Defence and Armed Forces

RF	Reintegration Fund
RRC	Regional Resettlement Centres
SAF	Serbian Armed Forces
SC	Steering Committee
SEE	South Eastern Europe
SME	Small and Medium Enterprise
SPECTRA	Separated Personnel Care and Transition Programme in Croatia
TC	Training Centre
ToR	Terms of Reference
UN	United Nations
VTCs	Vocational Training Centres
WB	World Bank

## Preamble

The 16 NATO - *Partnership for Peace* countries, under the lead of the Embassy of the Royal Kingdom of Norway to Serbia (in its capacity as a NATO - *Partnership for Peace* Trust Fund Lead Nation for Serbia), the Programme for Resettlement in the Serbian Ministry of Defence and Armed Forces (PRISMA) directorate of the Serbian Ministry of Defence (MoD) and the International Organisation for Migration (IOM) jointly embarked on this Practice Note project within the framework of the NATO - *Partnership for Peace* Trust Fund to document much of the work jointly undertaken over three years of fruitful and successful cooperation on resettlement programming in Serbia.

Countries of concern, IOM and NATO - *Partnership for Peace* member states have been working together on resettlement programming themes for almost 10 years, often under different frameworks, diverse political settings and with varying aims and objectives. The need for the institutionalization of such works is both necessary and timely.

This Practice Note is intended to assist readers and practitioners in understanding general resettlement practices and standards within a defence reform framework. It aims to serve as a generic guide for the eventual development and implementation of reintegration programmes that address staff being made redundant or being resettled by the same institution currently employing them.

Being developed within the framework of a NATO - *Partnership for Peace* Trust Fund, this Practice Note also aspires to provide guidance for future resettlement programmes, be they implemented by NATO, host countries or specialized partners. However, it is important to underscore that Practice Notes are not prescriptive, and as such require careful adaptation to the contextual realities on the ground.

## Introduction

Traditionally, the work of International Organization for Migration (IOM) has focused on emergency movement assistance, resettlement, return and reintegration of affected populations forced to move, assistance to refugees and internally displaced persons (IDPs) and similar emergency relief operations. However, since its founding almost 60 years ago, IOM has expanded its scope of activities in keeping with changing circumstances to provide a comprehensive set of responses for and policy advice on migration issues in all their complexity.

Since 1992, in fact, IOM has supported the design and implementation of some of the largest and most complex Disarmament Demobilisation and Reintegration (DDR) operations in the world, in peace-keeping and non peace-keeping contexts, where IOM's focus is on the latter, Reintegration

IOM now has over 15 years of worldwide experience in the resettlement and reintegration of regular and irregular military and security sector personnel. The reintegration of military personnel presents particular challenges, which have led IOM to develop a core of expertise capable of applying IOM reintegration methodologies to the unique situation of a given country.

Building on this expertise, over the past 10 years IOM has been engaged in several Defence Reform and Security Sector Reform initiatives; similar to DDR operations, these reforms comprise many inter-related aspects including, but not limited to, synchronised and coordinated political, military, humanitarian, security and socio-economic interventions.

In order to achieve long lasting sustainable stability and security, IOM always links its activities to the elected host government's' strategy, vision and priorities. The partnership with host governments further enhances their existing capacities in administering and executing such programmes, which are more often than not executed in adverse social and economic realities.

IOM's experience and interventions within Defence and Security Sector Reform programming have been documented to demonstrate how reintegration programmes act as a stabilizing factor during and immediately after crises, being equally supportive to nations experiencing social and geopolitical transformations and to governments undergoing political and economic reform processes.

This Practice Note is a joint contribution by the 16 NATO - *Partnership for Peace* countries financing the NTF under the lead of the Royal Kingdom of Norway, the Ministry of Defence of Serbia, and the International Organization for Migration to outline the various steps in establishing a resettlement programme to address the needs of downsized personnel following a defence reform effort by the Government of Serbia.

To better understand the content of this paper, it is important to note that it has been developed in a chronological manner. It looks at the rationale underlying defence reform in Serbia, identifies the difficulties and setbacks faced by the individual stakeholder, and highlights the solutions provided by the contributing actors. Finally, at the end of every section, lessons learned and best practises further underscore the optimal programme design for practitioners.

# 1. Principles of Defence Reform and the Importance of Resettlement Programmes

## 1.1 An Overview

Being a relatively recently conceived notion, especially within the Western Balkans context, Defence Reform has swiftly gained international recognition, especially by Balkan-neighbouring EU member states.

Defence Reform, often developed within a greater Security Sector Reform framework has garnered particular interest from NATO for evident reasons. NATO has paid special attention to Defence Reform initiatives in the Balkans and its diverse components: political, military, security and socio-economic dimensions, all of which are vital in the transition processes faced by former Yugoslav states. This attention has and continues to contribute to the development and overall recovery efforts of those states. Furthermore, scholars have recently asserted that Defence Reforms are an essential precondition to successfully passing through the development and transition phases of democracy development. Notably, NATO has gone as far as designating NATO Contact Point Embassies (CPE) <sup>1</sup> to lead trust funds addressing Defence Reform initiatives and activities in support of overall recovery efforts in countries that are undergoing defence reforms and, or, larger security sector reforms.

What is generally considered as Defence Reform? As the very name suggests, it is the strategic reform of a nation's defence institutions and military forces to be able to meet the challenges of the new era, whilst paying due consideration to the real defence needs and requirements vis-à-vis real threats.

Generally, defence reforms target both military assets and staff. Focusing on their human dimension, reforms usually entail the (re)building of a more professional and highly specialised army staff through hiring new staff (including civilian), training and retraining existing staff in accordance with the post-reform structure and the newly constituted army's respective needs.

Additionally, defence reforms often go hand-in-hand with the revision of a state's budget and financial spending as it relates to the defence sector. It is estimated that consolidated democracies, on average, spend less than 5% of their annual GDP on defence institutions. Both the professionalization of defence institutions and the

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<sup>1</sup> "The **NATO Contact Point Embassy (CPE)** network was created in 1992 to support the activities of the North Atlantic Co-operation Council (which became the **Euro-Atlantic Partnership Council (EAPC)** in 1997). Contact Point Embassies have also been established in the countries of the **NATO Mediterranean Dialogue** and **Istanbul Co-operation Initiative**. In every Partner Country, an Embassy of one of the NATO Member States operates as a NATO Contact Point, operating as a channel for disseminating information and facilitating programs" [www.nato.int/structur/oip/sponsors/intro.htm](http://www.nato.int/structur/oip/sponsors/intro.htm)

revision of financial allocations consistently result in the release and de facto reduction of military infrastructure, as well as a considerable reduction in the number of defence personnel. The latter reduction the principle focus of this document – is more commonly referred to as downsizing and triggers the need for the establishment of a resettlement mechanism to cater to the needs of affected personnel. The compound values for such a mechanism are discussed at greater length and detail later in this document. It is important to note that that being made redundant is a traumatic experience for the individual military personnel, because they not only give up their uniform but to a large extent also lose their identity, their status and perhaps several benefits once enjoyed as government employees, such as facilitated access to education, training and financial services. Ensuring a swift transition for these personnel from the military structures to the civilian world is essential in maintaining social stability in the communities of their return.

## 1.2 IOM Approach to the Defence Reform Process

In the case of Serbia, the Programme for Resettlement in the Serbian Ministry of Defence and Armed Forces (PRISMA) is the resettlement mechanism and is an institutional structure embedded within the Serbian Ministry of Defence. In contrast to other contexts, where resettlement structures are created ad-hoc and for the temporary purpose of carrying out the downsizing activities, the Serbian Ministry of Defence has created a permanent structure that deals with the reintegration of discharged defence personnel independently from the duration of the downsizing related to the defence reform. IOM supported PRISMA with a joint needs assessment and gaps analysis that lead to the development of a support programme focusing on the execution of specific components of the PRISMA programme, and at the same time developing the capacity of PRISMA staff. This support programme was then discussed with Norwegian representatives in Belgrade to be implemented as a NATO - *Partnership for Peace* initiative.

This joint IOM/MoD approach was essential in light of the vision that the PRISMA structure would continue to exist after the downsizing is completed; PRISMA's primary goal will, in fact, shift from assisting personnel currently being made redundant to supporting everyone leaving the defence system: professional soldiers, officers, NCOs, and civilians exiting the military at the end of their contract or career.

This document looks into the steps leading to and undertaken for the establishment of PRISMA and its further development with the support of the NATO - *Partnership for Peace* Trust Fund. This document also highlights the best practices of the same, serving as an example for similar resettlement programme development in other settings.

IOM's reintegration and resettlement programmes represent a modest, yet essential, component for the development of local and regional stability in a challenging political and economic environment. Recent evaluations of IOM activities in Serbia confirm that the NTF programme was successful in its objective to facilitate

the military to civilian transition of former military personnel and that the programme had improved, with minor exceptions, the economic circumstances of its beneficiaries.

Furthermore, recognising the empirical importance of host nation cooperation and leadership, IOM always links its operations to the host government's strategy, vision and priorities. It continues to emphasize capacity development and enhancement to improve administration, financial management, and project planning, design and implementation throughout all phases of the programme cycle from the very onset. Another comparative advantage of IOM in this area is its programme design which incorporates an exit strategy from the inception of the programme that is jointly developed between IOM and MoD stakeholders.

### 1.3 Requirements for Effective Defence Reforms

#### **Host Nation Buy- In**

Sizable institutional transformations are characterized by clear strategic goals and objectives backed by the host nation(s). In the case of a reform as significant in size as that of Serbia's defence institutions (and those being simultaneously undertaken in other SEE countries), the Stability Pact of South Eastern Europe<sup>2</sup> provided the primary framework, in agreement with the Government of Serbia.

The Stability Pact, amongst many other challenges, embarked on restructuring and downsizing military forces and institutions in the former Yugoslav republics and other countries of the SEE region, by providing the frameworks and technical assistance for such a transformation. This reform was necessary in the wake of the new geographic divisions, improved security situation, and the economic realities of the nations once constituting Yugoslavia.

In agreement with the EU, through the Stability Pact, the Government of Serbia has committed itself to comprehensive defence reform and the development of a reduced, more professional and modernized Armed Forces. The reduction of the army's size was later elaborated by the Government of Serbia (GoS) in a MoD *White Paper* which highlighted the services no longer required in the new constituency. The *White Paper*, which amongst other items includes specific recommendations in addressing the redundancy of MoD staff, paved the way for the establishment of PRISMA, subsequently supported by the IOM-implemented NATO - *Partnership for Peace* Trust Fund for Serbia.

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<sup>2</sup> "The Stability Pact for South Eastern Europe was launched in 1999 as the first comprehensive conflict prevention strategy of the international community, aimed at strengthening the efforts of the countries of South Eastern Europe in fostering peace, democracy, respect for human rights and economic prosperity" [www.stabilitypact.org](http://www.stabilitypact.org)

## International Support

NATO was designated as the Task Force Leader of the Stability Pact Initiative on Defence Reform and Conversion in SEE countries, and in more instances than one, bilateral programmes were appositely developed with individual nations for this undertaking.

In Serbia, NATO - *Partnership for Peace* supported the resettlement programme in Serbia through the establishment of a bilateral NATO - *Partnership for Peace* Trust Fund with the Kingdom of Norway as Lead Nation for the initiative. Similarly, BiH was another beneficiary of a NATO - *Partnership for Peace* Trust Fund programme, which also aimed to support the reintegration of redundant defence personnel. Croatia and FYRoM received bilateral assistance from Norway. FYRoM and Slovenia also benefited from EU assistance and support for their reforms outside a Trust Fund framework.

NATO - *Partnership for Peace* partners provided technical expertise, financial resources and leadership throughout the various phases of the reform and, in the case of Serbia, by specifically financially supporting the resettlement programme element of the reform. NATO - *Partnership for Peace* and the Serbian MoD identified IOM as the executing agency for specific resettlement components within the overall defence reform. To identify the specific areas of intervention, IOM and MoD conducted a joint assessment, which was also essential to determine cooperation modalities and priorities.

International support is also important at the implementation level. These programmes are often multi-annual, and the presence of international partners can ensure programmatic continuity even in cases where there is a change of government or legislation. On the other hand, the lack of such a presence may result in a stagnation process or allow prevailing internal bureaucratic and administrative processes to hinder the programme's effective implementation.

Agencies such as DCAF, BICC, York University, Columbia University, SUBUR Consulting and others have evaluated and/or analysed Serbia's defence reform's resettlement component, many of them also providing coverage of the steps, concepts and achievements of PRISMA and the NATO - *Partnership for Peace* Trust Fund. These evaluations carried by academia and/or specialised agencies have helped to adjust and improve programmatic implementation in accordance to the changing settings and sometimes new, emergent legal frameworks. Additionally, because the majority of those documents<sup>3</sup> are available to the public, stakeholders are better able to follow up on programme's developments. At the same time, these reports serve as a foundational learning model for other countries involved at different stages of developing and/or implementing similar programmes.

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<sup>3</sup> Reports, evaluations, assessments and other such documents can be found on file with the IOM mission to Serbia and the Emergency and Post Crisis unit in IOM HQ - [www.iom.int](http://www.iom.int)

## **Legal Framework**

As indicated above, and as evident as it may sound, legal frameworks that guide the implementation and execution of all aspects of defence reform and its various components are an indispensable and crucial element.

In Serbia, the EU's Stability Pact provided the necessary backdrop for the overall reform, which in turn facilitated the NATO - *PfP* role in defence reform, resulting in the establishment of PRISMA. At a later stage, the NTF instrument was devised as support to the defence reform process, specifically assisting in building the capacity of PRISMA as well as the implementation of some of its tasks.

As mentioned, the creation and/or revision of an adequate legal framework is the basis for developing any reform and remains an important element throughout the reform's implementation. Considering the multi-year duration of the reform, changes to the legal framework should be anticipated and might occur at any stage of its implementation. In certain instances, such changes might require small corrections in plans or procedures while in others, they might prevent the implementation of some planned activities.

Furthermore, the legal framework needs to be considered in its wider connotations and not only limited to defence matters. Security sector reforms also affect the social and economic aspects of a country and can be compromised in their effectiveness by laws that are not directly related to security/defence issues. Within the Serbian context, a change in the laws regulating the managing and disbursement of loans had a direct impact on the budget of the NTF requiring the allocation of additional funds for the implementation of that specific programme component. The need for due attention on the importance of legal frameworks in relation to operational programme activities is discussed in more depth later in this document.

## **Lessons Learned and Best Practices**

- √ Resettlement programmes are not inexpensive as much as they are intricate. Often they can not be implemented by countries in transition due to their lack of expertise on the subject as well as the lack of specific funding allocated in their own state budgets for such activities. External, neutral specialist agencies and specific (internal and/or external) funding help develop government expertise and ensure the timely and effective execution of such programmes.
- √ Joint (host nation and international supported) implementation has proven to be the most ideal and effective combination in the implementation of national reforms. Such joint effort is able to ensure continuity of the programmes both in terms of financial support and political commitment.

- √ Legal frameworks have to be revised or adapted before launching reform activities, but it has also to be taken into consideration that changes might continue to happen even during its implementation. Projects implementing and supporting those processes must therefore be designed with a certain degree of flexibility, especially in countries in transition.
- √ Legal frameworks must be considered at large and not only limited to the defence sector. Different aspects of the reform can be challenged by laws that may change during its implementation.
- √ Systematic and objective assessment of activities/projects implementing reform processes should be integral parts of the planning and design process as well as the management cycle. Assessments should continue to be conducted even after the implementation period. The aim of these actions is to primarily provide managers and stakeholders with regular feedback and early indicators of progress or lack thereof but also provide guidance on areas for possible improvement in order to achieve the intended results.
- √ Donors and member states appreciate objective assessments as it provides further assurance on the direction of the project, its activities and policies. They also contribute to the transparency of the actions and increase mutual trust and confidence among all stakeholders.

#### 1.4 A Stabilization, Peace-Building and Development Catalyser

The Republic of Serbia has committed itself to comprehensive defence reform. A reformed modernized Serbian Armed Forces (SAF) sets the precondition for as a security ally to EU and NATO member states. At the same time, Serbia's dedication to such a paramount undertaking is central to long-term peace, stability and prosperity in the Western Balkans and beyond.

In line with this commitment and within the wider defence reform effort outlined in the MoD's *White Paper* on Defence, the Ministry of Defence of Serbia initiated PRISMA. As stated above, this tool provides for a number of solutions within the large-scale redundancy plan scheduled to last until 2010. This section demonstrates how an apparently unpretentious resettlement programme can be influential – and at times spearhead - on stabilisation, peace-building and development paradigms.

##### **Stabilisation**

Almost a decade after the end of conflicts in Yugoslavia, the Stability Pact continued to provide the necessary pretext to further ensure long-lasting stability in the countries of SEE<sup>4</sup> by supporting five of the six countries formerly constituting

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<sup>4</sup> Albania, Bosnia, Bulgaria, Croatia, FYRoM, Moldova, Montenegro, Romania and Serbia

Yugoslavia (Bosnia, Croatia, FYRoM, Montenegro and Serbia<sup>5</sup>) with their respective defence reform programmes. This regional, hands-on intervention supported by the international community provides a new dimension to national military structures by enhancing the professionalization of armed forces and security structures as well as demilitarising some military infrastructures throughout the region. More importantly, this intervention by the Stability Pact has provided the much required assurance by all five countries that mutual reduction and transformation of the forces was taking place nearly simultaneously across the entire region.

As stated, Serbia's commitment to defence reform is in itself an indicator of its dedication to long-term stability in the region. However, decisions and plans must include objectively verifiable indicators ensuring and assuring that the intentions and goals are successfully met. One of the more challenging and daunting tasks, where such indicators are essential, is the plan to reduce the military forces by approximately 19,500 persons without disrupting the delicate social, security or political cadre of Serbia in its transition to a fully-fledged democratic nation. The PRISMA and NATO - *PfP* Trust Fund intervene in such contexts, ensuring that over the five years of the programme implementation that at least 5,100 high-risk persons are resettled as efficiently as possible during the country's transition and defence-reform undertaking.

It is not uncommon to see long-serving MoD staff made redundant, especially when MoD modernization and restructuring are the core reason for such an undertaking. Research has proven and documented time and again that, regardless of the context, as a result of their dismissal from the MoD, downsized staff have a common sense of betrayal towards their own Ministry, and in turn the very state which they have loyally served in times of both peace and conflict. These feelings proportionally increase with the number of years the staff has been serving in Ministry of Defence. As long-term serving military personnel, their knowledge of the 'civilian world' is as limited as would be a civilian's of military structures. Often unarmed with the necessary skills to face the civilian world, they might become the attention of people that are interested in using their knowledge of weaponry and military affairs. This is certainly not the case for all settings, but in countries of transition where rule of law itself may be in transition, this may provide the foundation for possible irregular and illicit activities.

Furthermore, some countries have gone as far as identifying clear statistical links between the incidence of poverty, social exclusion and the areas where former defence personnel reside. Some findings include the categorization of these geographic locations as having a number of development standards impeding human development. PRISMA and NTF programme for Serbia are the types of interventions that are among the most effective responses to such situations. They are stabilisation programmes that deliver concrete assistance to redundant, downsized

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<sup>5</sup> At the time PRISMA was inceptioned, Serbia and Montenegro were one country. Now Montenegro is required to develop its own separate programme addressing the resettlement of MoD personnel. On the other hand, Slovenia, Paradoxically found out it had to increase its military staff which it did by recruiting and training reservists.

personnel by providing the necessary assistance in the transition from military to civilian life while ensuring that stability is maintained and improved in time.

IOM has been working with host governments on such programmes intended to address the above mentioned challenges to stability, by supporting local, regional and national level recovery of lost resources and capacity, and providing the transitional bridge towards longer term development plans. Within that context, a specific IOM methodology called ICRS has been developed. IOM's ICRS<sup>6</sup> concept was adapted to fit into the NTF programme for Serbia and complement PRISMA's efforts in addressing some of the defence reform challenges.

### **Peace-building**

Although peace-building has seen several definitions, the authors hereby define peace-building as a long-term process that usually occurs after a conflict, which constitutes the strengthening of local structures and their respective actions or programmes to maintain and solidify peace, thereby avoiding any potential relapse into conflict.

At least in their initial phase, resettlement programmes in the Balkans have been mostly connected to defence reforms, and the downsizing of sizeable military institutions deemed no longer necessary as a result of the peace agreements reached amongst the concerned countries. Aspects related to the establishing of professional armies and the need to assist contract soldiers at the end of their careers were in this context kept marginal. The Stability Pact further strengthened the principles posed by these agreements by delineating more concrete measures to this undertaking. In Serbia, PRISMA constituted that programme which strengthened the reformed MoD structures to address the social and economic needs of a certain category of the population, that, if not adequately reintegrated into civilian life could pose a threat to the peace and stability achieved over recent years. Tasks related to the building of a professional army were also included in the portfolio of the PRISMA, but not seen as the main priority at the beginning of the reform.

Similar programmes in the region, such as SPECTRA in Croatia, LEPEZA in FYRoM, and the NTF for BiH are also part of an internal reform process but maintain elements of reconciliatory programming and manifestations of goodwill to sustain the efforts to achieve long-lasting, sustainable peace in the region. These programmes must be praised, especially against the backdrop of the previous overblown military spending and oversized military structures.

### **Development and Economic Support**

Defence reforms and the programmes designed at assisting the socio-economic reintegration of redundant personnel include two evident developmental factors. The first, and perhaps more apparent, is that the reduction of defence staff and

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<sup>6</sup> IOM's ICRS is a stabilization tool, specifically designed to support a smooth and peaceful socio-economic reintegration of select segments of the community while simultaneously enhancing the absorption capacity of the very same receiving communities.

infrastructures directly translates into reduced government budgetary allocations on military expenditures, but also increased earnings through the sale or alternative utilisation of military facilities and assets. The greater a country spends on its defence as a percentage of its GDP, the less money it will have to spend on other crucial aspects such as education and health. Therefore, the 'savings and earnings' resulting from a reform may have a direct impact on recovery and development efforts, thus significantly impacting the development of a nation as a whole.

Equally, resettlement programmes play an extremely important role in the development of a country by contributing to existing government development programmes and schemes. Programmes such as PRISMA provide former MoD staff with initial psychological support and counselling as well as relevant training and resettlement assistance. In combination with ad-hoc programmes such as the NTF for Serbia, they can also provide direct assistance and financial support for economic reintegration through jointly developed socio-economic income-generating activities. The latter focuses on grants for the establishment of micro-businesses, in turn requiring the purchase of products on the local market for the delivery of goods and services to the community at large.

Where possible, reintegration projects to assist redundant personnel should be developed in accordance with government economic development plans and as being complementary to government-sponsored initiatives such as the revamping of a specific sector, such as the tourism industry. In summary, resettlement programmes not only provide a financial injection to the local economy, but also contribute to boost local economies and specific government-prioritised sectors.

### **Lessons Learned and Best Practices**

- √ In areas such as the Balkans, where military personnel are usually well qualified and trained, reintegration programmes properly linked with national development programmes, Millennium Development Goals, and other external support schemes help in accelerating the country's endeavours from transition to development
- √ To base resettlement processes only on pension schemes and early retirement packages would add pressure on government institutions and national budgets for prolonged periods of time, especially when considering that some resettled staff may well be young enough to benefit from such assistance for decades. Moreover, the use of such schemes may suggest preferential treatment for resettled staff over civilian populations to the community at large.
- √ Economic support should be tailored to the specific situation of a country. An assessment of the human development indexes of the geographic areas of residence of personnel to be discharged or made redundant may help define the degree of assistance and support required by the discharged personnel.
- √ Regarding the delivery of social-economic reintegration assistance, it is better to focus on the "how and when" of assistance rather than the "amount".

- √ During programme inception, it is recommended to assess the stabilization and peace-building needs for better programme design and response design.
- √ Psychological support is an essential component of the project; only through a “changing mind” process are redundant personnel able to make the best use of the provided assistance and successfully reintegrate into civilian life.

## 2. The Serbia Experience

The Republic of Serbia, within the framework of its security sector reform, aspires to build an efficient and economically sustainable defence system by 2010, reform their armed forces to be capable of achieving the task set forth in the Constitutional Charter, and, together with other security sector forces, join international integration and efficiently respond to challenges, risks and threats.

Upon developing the programmatic and operational mechanisms to ensure the successful implementation of the reform, it soon became evident that to achieve the preset objectives a rather significant downsizing process had to be exercised that would target approximately 19,500 Ministry of Defence and Armed Forces personnel. In order to complete this task efficiently and without causing major social-economic turmoil, the creation and development of an adequate resettlement<sup>7</sup> programme was devised and launched under the name of PRISMA.

### 2.1 MoD HR Structure Prior to Reform

The *White Paper* on Defence outlines the human resources structure at the beginning of the reform process as follows<sup>8</sup>:

*The Ministry of Defence is comprised of professional military personnel (officers, non-commissioned officers, and contracted soldiers), conscripts and civilian employees. The trend of reducing the percentage of conscripts will continue until the Armed Forces become fully professional by 2010. There is a recognised discrepancy in the share of specific categories; for example, there is a lack of civilian employees, a constant lack of craftsmen, and a surplus of administrative staff. There is a discrepancy between higher and lower-ranking officers when compared to standards of modern armies.*

*The unfavourable material and social status in particular makes it more difficult to have adequate staffing with contracted soldiers. In accordance with the overall commitment towards the gradual professionalization of the Armed Forces, contracted soldiers will staff key specialties in the sphere of combat system crews until modern army standards are met.*

*The average age of officers is 41, of non-commissioned officers is 33, of contracted soldiers is 29, and of civilian employees is 43. Such an age structure imposes the need to undertake measures to have younger professionals to complement officers in particular. One of the measures that will directly bring about an improvement in the overall age structure of professional cadre will be retirement of a large number of higher-ranking*

<sup>7</sup> The term resettlement used in and throughout this paper refers to transition from military to civilian life or career change, -be it as a result of the redundancy process, or of a staff's ending military career vis-à-vis MoD needs.

<sup>8</sup> Source: White Paper on Defence of the State Union of Serbia and Montenegro, April 2005, p.32-35 (This document was developed while the State Union of Serbia and Montenegro still existed.)

*officers and civilian employees.*

*In addition, the plan addresses the need to reflect the multi-ethnic and multi-religious reality of Serbia proportionally equal to their percentage among the general population.*

With the above setting in mind and recalling the role of PRISMA to address the issues related to resettlement of personnel made redundant through the reform, it is clear that the MoD human resources structure was to be put to the test in such an important and complex process. The main challenges identified were:

- Military system was burdened with institutions dealing with issues that modern armies consider as “non-military” such as publishing houses, schools, and civilian medical institutions, which also affected the structure and number of the army staff;
- An unfavourable age structure for the reintegration in civilian life of officers and MoD civilian employees;
- Unfavourable distribution of ranks among officers - lack of officers with junior ranks versus a surplus of officers ranked major or higher;
- A series of social problems directly affecting military staff, primarily housing that would further complicate the reintegration into civilian life of those people. As the *White Paper* was being drafted, there were more than 17.000 defence personnel lacking any housing. In addition, a large number of defence personnel were the sole breadwinners in the family and therefore their salaries were the only source of household income.

These challenges inherently made the resettlement process more difficult.

However, the fact that PRISMA was seen as a permanent structure and not as an ad-hoc tool to deal with the reform processes was a positive sign. In order to carry out the downsizing process in a systematic, fair, transparent and effective manner, PRISMA was tasked to define tailored forms of resettlement support, paying due attention to the legal, operational, social, and economic implications for both the new MoD and for the discharged staff member him/herself.

### **Lessons Learned and Best Practices:**

- ✓ Although the *White Paper* reveals the purpose and objective behind the establishment of the PRISMA programme, the lack of in-county expertise and funding might be detrimental to the implementation of a well articulated plan.
- ✓ International support from NATO - *Partnership for Peace* countries is essential in the Balkan context (in Serbia, primarily Norway, United Kingdom, Netherlands, Denmark, Italy, etc.).
- ✓ A detailed analysis of the problems and needs of the military staff should be conducted before the planning of any resettlement activities.
- ✓ Military structures normally provide support to their staff that is often not

provided by civilian employers. Host countries must therefore evaluate the social implications that will be faced by those who will leave the service. This ensures better programme design to compensate for these ‘losses’.

## 2.2 Legal Framework Determining Resettlement and Assistance

In developing the assistance frameworks that would guide the development of assistance to be delivered by PRISMA and its partners in this endeavour, and to create a solid legal basis for a long-term PRISMA plan, a team of MoD experts paid special attention to the following legislation:

- Law on the Army of Yugoslavia;
- Labour Laws of the Republic of Serbia and the Republic of Montenegro;
- Law on Pension and Disability Insurance of the Republic of Serbia;
- Law on Employment and Unemployment Insurance;
- Decree on the principles regarding internal organization and systematization of job positions in Ministries, organizations and services of the Ministerial Council;
- General Collective Agreement<sup>9</sup>.

In addition to the above, the following legal documents served as the basis for further determining who would be made redundant, and the rights, as well as entitlements, they would have during this process. The below also served as additional measures for MoD’s expert team to streamline and conceptualise the types of eventual assistance to be provided within the resettlement programme’s components<sup>10</sup>:

- Criteria for termination of professional military service vis-à-vis MoD needs;
- Criteria for professional military service in both old and new structure;
- Criteria for ranking and selection of redundant military personnel;
- Criteria for the use of redundant military personnel;
- Criteria for referral to retraining;

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<sup>9</sup> This Agreement regulates issues not covered by the Law on the Armed Forces: “This Collective Agreement, in line with the Law, regulates rights, obligations and responsibilities in the area of employment and working relations, the procedures for changes and amendments, mutual relations of parties hereto, and all other issues of importance for employee and employer.”

<sup>10</sup> Here it is important to underline that this specific component was developed while the State Union of Serbia and Montenegro still existed. Some of the above-mentioned documents were amended in the meantime in order to meet the current needs of the Republic of Serbia.

- Annual guidelines for implementation of resettlement programme components;
- Annual plans for admission to professional military service;
- Annual plans for downsizing of the Armed Forces;
- Annual overviews of the selected redundant personnel with respective data.

**N.B.** While the above parameters provide the selection mechanics determining who should be made redundant, there were no clear directives defining the de facto, concrete assistance that the eventual resettlement programme would provide to each and every discharged personnel.

### **Law on the Serbian Armed Forces**

- **Separation of Officers and NCOs:** The Law on the Serbian Armed Forces entered into force on 1 January 2008. Article 110 of this law defines the general reasons for MoD's termination of active military service of officers and NCOs. While defining the Ministry's rights to terminate staff, the law also explains the staff's right to financial compensation and possibility to transfer to civilian status.

Article 111 of the law is driven by the need to legally define and determine who is eligible to benefit from a resettlement programme. It stipulates that an officer or NCO whose service is terminated pursuant to service needs may be referred to retraining for civilian professions or jobs. Retraining is organized up to the qualifications degree level that the person holds, or lower if the referred person accepts such.

It is important to underline that Article 192 introduced the possibility to terminate the service of a staff member vis-à-vis MoD needs, provided that s/he has at least 20 years of pension insurance, at least 10 of which are as a professional service member. This target group is also eligible for resettlement support.

- **Separation of Civilian Employees of the MoD:** Articles 129 and 130 of the Law on the Serbian Armed Forces define the modalities on termination of employment for civilian employees. An especially important section refers to those whose position has been abolished or made redundant.

Civilian employees affected in this way may choose to participate in the resettlement programme if they wish to benefit from it. However, they are also entitled to a single severance pay equal to 12 gross monthly salaries based on the salary they received in the month preceding their last month in service (i.e. the month during which employment is terminated). Civilian employees also have all the same rights in line with the legal regulations as all other military staff made redundant.

## **Law on Civil Servants**

Within the Serbian military system, the category of Civil Servant include both Military and Civilian staff. While the position of a “Civilian” Civil Servant is fully regulated by the Law on Civil Servants, “Military” Civil Servants are considered military personnel and their position is regulated by the Law on the Serbian Armed Forces.

According to the Law on the Serbian Armed Forces, those civilian employees of the MoD who hold the status of civil servants cannot be considered as possible target group for PRISMA. The law regulating the termination of employment for those “Civilian” civil servants is the same as that applied to civil servants of all other Serbian ministries.

## **Labour Law**

Serbia’s Labour Law specifies the obligations of an employer in Articles 153, 154 and 155. These articles define those special cases when a specific (high) percentage of employees is dismissed and employers are obliged to provide them compensation through redundancy-type programmes. According to those provisions such an obligation arises when, for technological, economic or organizational changes within a specified time there is a need to terminate the employment of a certain number of staff.

These articles also define that the employer is obliged to take appropriate measures for new employment of surplus labour, together with the respective trade union and national employment service. The redundancy-type programme contains criteria on defining measures to deal with surplus employment (transfer to other work assignments, employment with another employer, retraining or additional training, part-time work but not less than half of full-time hours, etc.), measures for solving the socio-economic status of those made redundant and timeframe for termination of employment contract. For civilian employees of the Serbian Armed Forces, the Labour Law is applicable for the parts that are not regulated by the Law on the Serbian Armed Forces. However, the provisions of the Labour Law are largely met through the implementation of the activities of the PRISMA programme.

## **Regulating and Establishing the Resettlement Directorate**

Following the revision of all the above relevant documentation and legislation, laws as well as by-laws, the guidelines for the resettlement of the Serbian Army were set and the existence of PRISMA, its goals, objectives and the specific activities it would undertake during its life cycle were regulated. This also led to the definition of PRISMA’s organizational set up including staffing, selection of personnel, locations and offices, proposals for amendments to the Law on the Serbian Armed Forces, selection of institutions to conduct retraining courses for civilian professions, and earmarking funds for these purposes.

The PRISMA Directorate for Resettlement with three Regional Resettlement Centres (RRCs) were established through a ministerial decision in December 2003. The

Directorate for Resettlement “PRISMA” (hereinafter referred to as: the Directorate) oversees three regional resettlement centres (hereinafter referred to as RRCs) throughout Serbia.

### **Lessons Learned and Best Practices**

- √ All relevant legal and administrative documents (e.g. labour laws, social assistance, pensions, etc.) should be considered as they help to design the various components of the resettlement programmes. In this sense close cooperation between government institutions is also required.
- √ The revision of existing laws may suggest the need for developing new laws to define issues such as the reasons for staff separation, the rights of the separated staff as well as their entitlements and eligibility for compensation and/or reintegration programmes.
- √ Ideally, the development of new laws should be occur prior to staff service termination and, only once the legal framework is clearly defined, programmes that are in line with those legal principles have to be designed. However, it has also to be taken into consideration the opportunity that the existing law and by-laws might need to be adapted according to the practical requirements of the programme’s implementation.
- √ Different laws and assistance frameworks may have to be developed for civilian employees, although it has to be taken into account that such decisions may create friction between the target groups.
- √ Sometimes the local environment does not allow structured responses to the resettlement needs and ad-hoc, interim and temporary resettlement interventions are applied. However, it has to be considered that even in those cases delays are to be expected and procedures will not be necessarily applied in short timeframes.
- √ Some countries have specific regulations governing interactions between governmental authorities and foreign institutions, including opportunities for international financial assistance. These laws need to be well considered before finalising any agreement with foreign counterparts (in the case of PRISMA, donor funds are managed in accordance to Serbia’s Law on Donations).
- √ In terms of structures, a central body that analyses, processes and directs regional offices is ideal in ensuring uniform programme implementation. Regional offices should be established looking at the place of residence of beneficiaries as well as geographical conformation of the territory to allow easier access to the services.

## 2.3 The Resettlement Process: MoD and Stakeholders

The resettlement support process in Serbia was launched in 2004 with the aim of providing support to those leaving military service in a systematic and organized manner. It was important to identify individual skills and competencies transferable into the civilian sector and enhance those skills for establishing a business or apply it to civilian commercial activities. This approach was developed through the adaptation of Western European countries' and transitional countries' experiences to the specific conditions and realities of Serbia.

### **Initial Preconditions for Operationalising PRISMA**

For the successful realization of PRISMA, the following pre-conditions had to be met:

- Allocation of funds to finance set up and managing costs of the PRISMA structure and its components;
- Validation by the Serbian Ministry of Education of knowledge and skills gained by the military staff during military education;
- Establishment and utilisation of the training centres set-up within the PRISMA framework as well as the civilian regional vocational training centres, including validation of the courses given at those centres by the Serbian Ministry of Education or respective institutions;
- Engaging the network of National Employment Service offices, employers' associations and chambers of commerce;
- Linking PRISMA's IT system with relevant existing databases within MoD, national employment agencies, employers' associations and others.

In the Serbian context, although at different stages of the reform and not necessarily at its beginning, most of the above mentioned conditions were met within the first 2 years of implementation. Funding was provided through the budget of the MoD along with the support of international donor contributions. Considering the long-term perspective of the PRISMA programme, international funding was always considered as complementary to a structural internal funding. While national budget allocations were primarily used for regular management activities, international funds were focused on exceptional expenditures related to the set up of the mechanisms and to build the capacity of the institutions both at the structural and human level. Moreover, international funds were used to finance some of the re-integration activities.

Much of the knowledge and many of the skills gained at the Military Academy were recognized by civilian universities, based on the Protocol on Cooperation with the Belgrade University signed in 2008 and that included the Faculty of Security Studies, Faculty of Organizational Sciences, Mechanical Engineering Faculty, Electrical Engineering Faculty, Faculty of Traffic and Transport Engineering, and the Criminal Police Academy.

Training activities were organised directly by the PRISMA utilising some MoD funds and was soon strengthened with the organisation of additional courses for redundant officers that was financed by the UK and Dutch governments as well as the Nordic Initiative-funded courses for redundant NCOs and civilians

Cooperation was established with relevant institutions, including the Ministry of Labour, the chambers of commerce and coordination/informative meetings were organised with representatives of employers' associations and social partners.

The PRISMA IT system was upgraded through interim software applications used as interim solutions. However, although negotiations are still ongoing, there still lacks an adequate registration system for redundant military personnel at the National Employment Service. The reasons behind such a delay are mainly related to the difficult economic situation in Serbia and the very high rates of unemployment.

### **Contextual Realities**

When devising the support mechanisms and specific assistance to be provided to the end users of the PRISMA programme, the Directorate and its staff were faced with additional external challenges. Despite being outside the immediate control of MoD and PRISMA, they had nevertheless to be taken into consideration during programme design. These contextual realities include:

- Unemployment Rate: This was extremely high and characterised by the surplus of labour resulting from Serbia's industrial privatization process;
- Weak Economy: Serbia was challenged with slow economic growth in the early years of 2000, typical of countries in transition as they adapt laws and legislations to the new economic paradigms and realities;
- Employment Support Mechanisms: Lack of funds for capital investments meant limited funds for starting up new or expanding existing businesses which in turn would generate employment;
- Financial Loans: Discouraging terms for seeking loans, particularly high interest rates on loans for start-up businesses.

### **Establishment of a Programme Implementation Council**

The resettlement issue is a complex one requiring interdisciplinary effort from all government structures. Apart from the MoD, the Ministries responsible for Economy, Labour and Employment, Education and Social Policies, as well as the chambers of commerce and employers' associations were called upon to support the Programme and to develop synergies with their own activities.

The engagement of multiple stakeholders calls for coordinated efforts, in sync with one another at all levels and stages of the programme design and execution. To ensure this approach, an Inter-Ministerial Programme Implementation Council was established. With MoD as the overall responsible agency for the management of the

entire programme, terms of reference were designed for each of the stakeholders and partners.

A concrete example of the effectiveness and importance of such a coordination mechanism is the fact that the discussions and negotiations performed within the Council allowed the establishment of retraining centres within existing academic institutions, selected according to realistic labour market needs. The different counterparts present at the Council provided the necessary resources, expertise, and other forms of cooperation to ensure successful implementation of PRISMA. Annex 2 highlights some of the roles and responsibilities of the partnering ministries as well as agencies.

### **Labour Market Survey**

In view of the anticipated reintegration hurdles mentioned above, PRISMA recognised the need to conduct a targeted labour market survey to analyse the labour market in Serbia and survey the supply and demand of the labour market within the two largest cities in Serbia (Belgrade and Nis).

Funds for this activity were sought by PRISMA from the international community and, in 2006, the private company *New Insight* was commissioned by the Ministry of Labour, Employment and Social Policy with Nordic Initiative funding to conduct a labour market survey. *New Insight* carried out a detailed analysis and description of the relevant economic sectors, staff policy of enterprises and current and future employment opportunities of the NCOs and civilian employees who are to become redundant, including a description of job opportunities in relevant sectors such as IT, security, manufacturing, etc. The findings of this comprehensive analysis paved the way for the development of appropriate training curricula as well as the selection of institutions that could provide retraining courses.

The importance and positive impact of this activity suggested to PRISMA the need to replicate it on a recurring basis. In 2008, the Serbian Economics Institute and Statistical Bureau was commissioned to carry out a second survey in 22 Serbian municipalities using guidelines similar to those used two years earlier. The PRISMA Directorate was directly engaged in that task and steered the entire process to make sure that it would provide relevant answers to programmatic needs.

Unlike the previous study, which was more general in character and dealt with analysis of general supply and demand, this study was both broader in the geographical scope but more specific and focused on the programme needs. Special attention was paid to identifying the most required job profiles and retraining needs. Findings included very practical issues like the high degree of willingness by employers to hire NCOs and civilian employees and the specific needs for retraining including strong recommendations on strengthening basic entrepreneurial knowledge and basic business skills, such as: management, financial, organizational, planning, marketing, etc. The latter is particularly important for those who decide to reintegrate through the start-up of their own businesses.

Through the findings of those two activities, the need for providing material/financial support to individual reintegration became more clear. An assessment of existing mechanisms for financial support and the research of new modalities started at this stage.

### **Lessons Learned and Best Practices**

- √ The design of resettlement programmes will often require the participation of several actors. To ensure coordinated action by all stakeholders towards meeting the final objectives, an Inter-Ministerial Programme Implementation Council facilitates such an undertaking.
- √ Government needs to recognise that resettlement assistance to discharged personnel is its own concern and not an MoD stand-alone project. As such, relevant ministries should delegate decision makers from their respective ministries to the Inter-Ministerial Programme Implementation Council.
- √ Resettlement programmes must be self sustainable and considerate of external realities. Internal and external funds should be combined whenever possible to be used during the initial phases of the programme, when structures need to be established and the number of staff to be resettled is high. The host country should identify and allocate funds from its budget for management costs and successive resettlement cases.
- √ A labour market survey is an important tool for programme designers to use in the prioritization of geographic areas and/or social area topics.
- √ Databases and other systems should be integrated with and within the existing local reality using existing structures and programmes as much as possible. For example, the registration of jobseekers should be coordinated with the National Employment Service. Similarly, the labour market survey undertaken for the MoD resettlement programme is of extreme relevance to NES and similar methodologies should be used to ensure uniformity in survey and findings.
- √ Always assess the socio-economic situation to identify challenges that are not directly related to military staff but might impact their reintegration.
- √ A checklist with the minimum pre-conditions for the start of activities is a useful tool that helps develop a realistic timeline and plan of action.

## **2.4 Public Information Campaign: Strategic Design & Impact**

Part of PRISMA's success is also attributable to the PR activities shaped by the PRISMA team and implemented by the MoD Public Relations Department, whereby the former devised a campaign to raise awareness of the Programme's aims and goals specific to the following target groups:

- National and international audience;
- SAF members and their family members;

- Potential employers;
- Governmental and non-governmental organizations;
- International partners.

All the target groups and intended audience received regular, updated and comprehensive information on the programme and its components. The path leading to the establishment of PRISMA, and the assistance provided by and through this programme were amongst the messages divulged by the campaign. The objective was to build confidence and, in particular, a positive attitude by the public towards the resettlement issue. The campaign highlighted the differences between the category at stake in relation to other unemployed and jobseekers by explaining that those leaving military service are in need of specialised support in order to be in an equal position as all other jobseekers. Employers were made aware of the transferable skills of defence personnel and how those same skills could benefit future employers. In presenting conceptual solutions, the campaign stressed that PRISMA was open to accepting support from individuals as well as domestic and international institutions.

The media used for disseminating the above included:

- Direct contacts with potential stakeholders;
- News articles and advertisements;
- Brochures, posters, and web pages;
- Radio and TV programme;
- Press conferences, phone contacts, and public forums;
- Direct mailings (notifications, offers).

As the programme was developing, and initial activities were being executed, PRISMA increased the media coverage and launched more intensive promotional activities, including:

- Presenting updates on the programme as well as overviews on PRISMA's plans and achievements;
- Periodical updates on the RRCs work and achievements;
- Promoting the activities of the training centres and advertising the knowledge and skills acquired by the resettled personnel at the certified training centres;
- Promoting the results achieved by successful programme graduates;
- Visibility of beneficiaries' participation to job fairs; and,
- Providing presentations at entrepreneurship fairs and other such events.

The public information campaign, combined with specific briefings and press conferences, contributed to overcoming some of the hurdles highlighted in the 'contextual realities' section.

### **Lessons Learned and Best Practices**

- √ It is important to approach the PI/PR issues with marketing principles including the development of "slogans". In the PRISMA context, the following were used:
  - Beneficiaries: "You are not alone"
  - MoD: "Importance of a modern army"
  - Government: "Only synergies will address this nationwide concern"
  - Employers: "Benefits and advantages of employing ex-servicemen"
  - International partners: "Reform is synonymous to good will".
- √ With the backdrop that "negative information is easier to sell", PRISMA's PI campaign's main focus exploited the professional image and experience of servicemen, often coupled with their relatively young age. These factors are of mutual interest and benefit to both employer and employee.
- √ An essential part of the campaign should be devoted to provide information to other governmental counterparts. The support of other institutions is essential for implementing the resettlement activities but it can only be achieved if those counterparts are made aware of the mechanisms, plans and goals of the programme.
- √ In relations with members of the media, the PR departments of the MoD plays an essential role; however, it has to be considered that those departments may not be well-g geared to marketing campaigns or to intensive promotion campaigns and cause delays in the delivering of a message. Cooperation on those matters needs to be well coordinated and activities should be planned in advance.
- √ Considering that defence reform and the downsizing/re-integration processes have a direct link with policy decisions of the government, the level of intensity of the MoD PI activities might need to be different during the different phases of project implementation. To avoid delays or the lack of adequate PI activities in certain moments of the implementation, the project could decide to establish additional PI mechanisms that are independent from MoD. However, those mechanisms should deal with PI activities that are related only to operational issues.

## **2.5 PRISMA's Organisational Structure and Composition**

For the successful realization of any reform programme, all activities should be managed and coordinated with prescribed procedures for communication and clearly defined responsibilities for all stakeholders. In the case of Serbian defence reform and the set up of a resettlement mechanism, that principle was also applied, through the establishment of two main components:

- a) **Within MoD:** Human Resources Sector, PRISMA Directorate and its three RRCs, and programme coordinators.
- b) **Outside MoD:** Programme Implementation Council, national and international partners, and training centres.

Annex 3 shows the organizational structure of the various institutions involved in the PRISMA programme.

### **Optimal Configuration of PRISMA**

The Regional Resettlement Centres in Belgrade, Novi Sad and Nis provide assistance to all personnel categories – officers, non-commissioned officers, civilian personnel and contracted soldiers – requesting reintegration assistance. More specifically, under the overall guidance of the PRISMA Directorate, the RRCs undertake the following activities:

- Provide psychological support and advise on socio-economic reintegration;
- Provide counselling in career selection;
- Create and update beneficiary database;
- Run motivation workshops (topics addressed at the MoD workshops could be found in the Annex 4);
- Monitor the labour market situation and needs for specific job profiles;
- Select candidates for training and/or retraining;
- Refer candidates to training centres and maintain relevant records;
- Provide active assistance in job search;
- Maintain cooperation with regional and local institutions in the field of employment, education and social welfare;
- Provide expertise to programme counterparts;
- Monitor programme and project implementation, providing relevant feedback on the same; and,
- Monitor candidates for two years after the completion of training.

### **Staff Composition Training, and Processing Capacity**

The capacity building of PRISMA staff began with the organisation of a course for “training resettlement staff” based on UK practices in that field. That training was run by the experts from the CTP (Career Transition Partnership)<sup>11</sup> in Belgrade, in 2004 according to a “train the trainers” module.

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<sup>11</sup> CTP is an institution that deals with different aspects of the resettlement process of UK military staff.

In 2004, PRISMA staff, together with selected staff from the Officers' Training Centres (TC) in Belgrade and Nis in 2005, attended a training course at the Manchester Business School (MBS) in the United Kingdom. That course aimed at developing joint plans for course implementation, TC development plans and the programme as a whole.

In 2005, the MoD staff and experts from the Nordic Initiative organized a Kick-Off Seminar in Belgrade with the aim of establishing an NCO Training Centre (NCO TC). The outcomes of the seminar included a business plan for and organizational structure of the NCO TC, but more importantly, seminar participants gained new skills and knowledge about the establishment and management of such institutions through active involvement in problem solving.

In 2006, a "train the trainers" seminar was held at the Amu Fyn Labour Market Training Centre in Odense, Denmark. This course was designed to prepare PRISMA resettlement advisers to work with a specific target group (NCOs and civilian employees educated for specific military professions) that would attend the courses at the NCO TC. Cooperation with the trainers from Amu Fyn continued with a train the trainers and lessons learned course for resettlement advisers organised in Belgrade in 2008.

Through the combination of the above-mentioned trainings, PRISMA staff had their capacity built in the following fields:

- counselling and mentoring skills and systems;
- marketing skills;
- operational management;
- networking skills;
- developing corporate networking skills;
- quality assurance;
- development planning;
- launching a media campaign;
- identification of key competences;
- overview of employer requirements;
- interviewing techniques and job applications;
- trainers-counsellor skills;
- facilitating the learning process;
- trainer-counsellor influence, appearance, active listening, adaptability and flexibility.

The PRISMA team was also trained on issues related to the establishing of institutions dealing with retraining and resettlement. It has to be noted that the knowledge and skills received through those trainings were immediately put into practice in the setting up and managing of the PRISMA.

In order to build an adequate structure that would allow PRISMA to deliver its services in an effective and organised manner, an analysis of the potential caseload as well as the job opportunities and the socio-economic situation in the different regions was conducted. On the basis of this analysis, the number of RRCs and their locations was decided. Each RRC was built to have a service-providing capacity of 100 new clients individually assisted per month with weekly follow-up motivation courses to be organised for 25 clients each.

When defining the capacity of the RRCs, it was understood that the resettlement process advisers may have several consecutive counselling sessions with new clients and each session requires adequate recording of the respective information in the relevant databases. In addition, the caseload of new clients overlap with the backlog of previously registered clients who may come to the centres for additional information and counselling for a period of two years after the termination of their employment.

In the case of PRISMA, it was estimated that, in order to successfully assist and interact with the above-mentioned caseloads, each RRC should be staffed with four advisers (this number includes an RRC manager in each RRC) and one psychologist. At the central management level of the PRISMA Directorate it was estimated that, in addition to the person responsible for the entire programme (director), it is necessary to employ staff having the following skills/competencies: legal officer, logistics officer, international military cooperation and public relations officer, project development officer, data analysis officer, database specialist and IT maintenance officer.

As previously mentioned, some of the resettlement activities, especially in the initial phase of implementation when the target group is particularly high might require a higher number of staff (positions which could possibly be financed by international counterparts) and consequently larger office spaces. At a later stage, office premises and staff might be reduced and different skill/competencies might also be combined into single positions.

In an instance where the resettlement programme is implemented with a partner agency or institution, office space is to be made available to allow joint activities and exchange of experience and information. PRISMA is implemented with the support of the International Organization for Migration (IOM), as the executing agent for the NATO - *Partnership for Peace* Trust Fund Programme for Assistance to Redundant Defence Personnel.

In addition to the above mentioned training courses, capacity building of PRISMA staff has continued throughout the implementation of the PRISMA programme

through a combination of training courses, learning by doing and coaching offered by IOM staff. Training course topics have included:

- Communication skills;
- Advanced communication and negotiation skills;
- Teambuilding;
- Basic training on finance and loans;
- Business plan assessment and development; and,
- Business incubation

### **Essential Components for a Resettlement Programme: 11 Components of the PRISMA Approach**

After five years of programme execution, it can now be established that the following eleven components should be present at the onset of a resettlement programme:

- **1. Providing Information and Media Support:** Providing information and media support implies the application of marketing principles in the promotion of integrating redundant personnel, and the purpose is achieving widespread public awareness of the organization. A unique strategy for media support ensures full awareness of all target groups on the various challenges faced by redundant personnel ensuring a positive attitude of the public towards this issue pertaining to redundant military personnel. This programme component explains that discharged servicemen are not only losing a job but their profession as well, and are therefore in need of specialised, tailored support. PRISMA's support aims at placing redundant military personnel in an equal position with other persons in search of employment, ridding any notion that military personnel have preferential access over other jobseekers. The media and marketing approach towards potential employers stresses the transferable skills of defence personnel that can be applied in non-military structures highlighting that, in fact, they can even be mutually dependant for the success of some businesses.
- **2. Motivation Courses:** Resettlement advisers in the RRCs develop and adapt motivational courses with the aim of preparing and motivating all clients for individual, active job search. Motivation workshops are carried out in a timeframe of one to three working days and are organized for groups of 10-15 persons. Annex 4 provides an outline of the topics addressed in such courses.

Psychologists are an integral part of the counselling team, and advisers from the National Employment Service are invited when necessary to answer specific questions on employment-related questions at these courses. The teams may operate in the RRC office, or at the location of course attendees' unit, by setting up mobile teams. Motivation courses often include:

- A generic presentation of the programme and the individual characteristics of the various programme components;

- Providing information and advice on resettlement;
  - Familiarization the audience with the current labour market situation;
  - Practising C.V.-writing skills and interview techniques;
  - Carrying out psychological, competence and skills tests available in RRCs;
  - Providing technical and legal information on business start-ups; Preparation and development of individual resettlement action plan.
- **3. Providing Information on Small and Medium Entrepreneurship:** Providing information on small and medium entrepreneurship is intended for all those who are leaving military and who have opted for assistance with the establishment of an enterprise. Beneficiaries receive information from RRC advisers on the entire process of business start-ups, including relevant legal regulations, technical advice as well as the benefits of direct financial support in starting up small and medium businesses.
- **4. Advice, Assistance and Support with Job Search:** Advice and support in job search is done through the RRC advisers, in cooperation with branch offices of the National Employment Service, employers' associations and Chambers of Commerce, other relevant institutions in Serbia as well as individual employers. Each individual is assigned to an adviser who monitors him/her two years prior to service termination and then through employment and beyond, until two years after the date of service termination in the MoD. C.V. writing and interview techniques also constitute a part of this component. This success of this specific component success is also measured by the number of employed beneficiaries.
- **5. Employment with Suppliers or Business Partners of the MoD:** The MoD has institutional partnerships with a number of suppliers, business and reliable service providers who may require the expertise and knowledge of military personnel. Following the establishment of a transparent process regulating the transfer of redundant and/or resettled personnel, MoD considered these partners as potential future employers. (At the time of writing, this component has not been implemented due to the lack of adequate legal regulations for such transfers).
- **6. Loans to a Selected Employer:** This component looks at providing interest-free loans (or loans with other favourable conditions) to selected employers and/or subsidies to employers for supporting the long term and sustainable employment of redundant military personnel. Under these schemes, employers are granted loans in exchange to providing a job opportunity to select redundant military personnel. This MoD/employer relationship lasts until the loan is repaid or until the contractual timeframe for subsidies has expired.
- **7. Grants for Self-Employment:** Grants are provided for the establishment of a small business or enterprise. MoD/PRISMA provides assistance to the development of business ideas and plans and retains the right to approve or reject the disbursement of such funds.

*N.B. It is to be highlighted that, mainly due to budget constraints, PRISMA was not in the condition to directly implement components 6 and 7. These components were implemented thanks to the support of some of the NATO - Partnership for Peace countries through the IOM-implemented NTF project.*

- **8. Training:** Training opportunities are accessible by all eligible programme beneficiaries upon an explicit request and expression of preference. Trainings are designed to provide qualified, professional skills to access jobs in non-military structures according to the labour market needs. Training centres operate within educational institutions, formally recognised by the Government of Serbia. Some of those centres have been set up through the support of international donors. The UK government supported the setting up of the Officers' Training Centre within the Faculty of Organizational Sciences of the University of Belgrade with the ability to deliver up to three courses per year for 100 officers each.

The Kingdom of Netherlands supported the establishment of the Officer's Training Centre within the Mechanical Engineering Faculty of University of Nis with the ability to deliver up to three university-level courses per year for 100 officers each.

A Training Centre for NCO staff is currently being established through the support of the Nordic Initiative and will have the capacity to train around 180 trainees per year.

Modules are selected and training providers identified in accordance to the educational level of the beneficiary; however, the beneficiary is also given the opportunity to enrol in a course designed for persons with a lower qualification than that one he is currently holding.

- **9. Employment in Other Government Institutions:** Employment in other government institutions is a component that directly depends on the expressed needs of other ministries, as well as government agencies, institutions and public sector companies. In this sense, this component might be directly affected by the public administration reform processes, and the rationalisation of the public sector which may require skills available within MoD structures. The implementation of this component, in fact, takes into account the beneficiary's transferable skills applicable in other structures vis-à-vis the needs of the latter.

In the Serbian context, this component has had limited implementation as many other government institutions are currently faced with restructuring processes, and, in several instances, are themselves reducing the number of personnel. This element has to be carefully thought through within the government in order not to simply transfer the problem to another ministry; it has to be done on the basis of needs and skills.

- **10. Regular Severance Pay:** Regular severance pay relates to a decision of the Minister of Defence on the amount of severance pay for those made redundant

in line with existing legal regulations in this area. The basic purpose of this component is to fulfil MoD's legal obligations as an employer.

This component is not an essential part of a resettlement programme and can be avoided in those environments where there are no such laws that need to be taken into consideration by the reform process.

- **11. Handing Over Military Facilities for Business Start-Ups:** Recognising that reform processes lead to a de facto reduction of military assets and infrastructure, some military facilities may be exploited for the development and establishment of business start-ups (i.e. business incubators).

### **Lessons Learned and Best Practices**

- √ In order to set up a cost-effective and functional structure, it is necessary to conduct a detailed analysis of the potential caseload, considering their geographic distribution within the country. It is also necessary to have in mind the assistance to be provided and the activities that the advisors will have to perform during their assignment.
- √ When defining the size of the resettlement structures, it should be kept in mind that a higher number of staff and larger office premises may be required in the initial phase of implementation due to a higher initial number of beneficiaries. In practise, resettlement activities are not part of a linear process but rather have unexpected ups and downs in terms of the number of beneficiaries.
- √ The capacity building of the staff involved in the resettlement activities is a process that will certainly count on a “learning by doing” approach; however, basic knowledge will have to be built through training activities. In the experience of PRISMA, the best results have been achieved through courses organised by actors already involved in similar resettlement activities in other countries.
- √ Developing staff capacity through coaching, mentoring, workshops, and workflow documentation is essential in ensuring programme continuity after the departure of international and/or local partners.
- √ The lack of funds and expertise prevented PRISMA from delivering specific programme components beyond counselling and referrals to trainings. IOM's intervention bridged this gap with funds from the NTF for Serbia. This cooperation between internal and external actors has proven to be very effective, especially at the stages of the programme when the number of beneficiaries is considerably high. However, from the beginning of that cooperation a proper mechanism for capacity building and transfer of knowledge has been organised so that PRISMA is gradually taking full ownership of specific NTF programme components, and identifying internal funding sources for implementation of all programme components without international funding support or technical assistance.

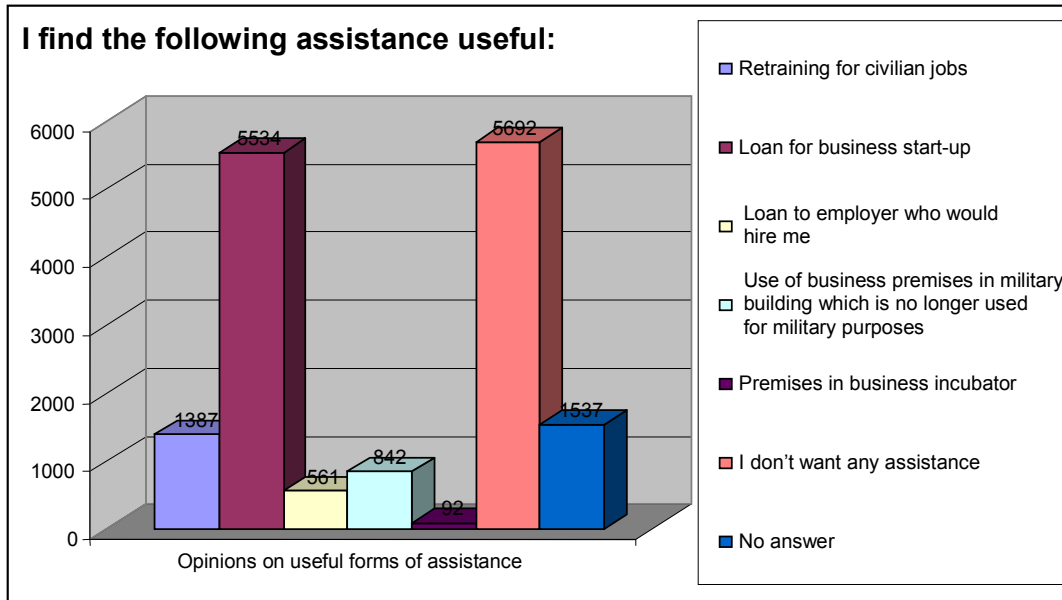
- √ When a training centre is established, administrative staff should also be assigned to it. The management of the NCO Training Centre, for example, would require at least three persons (one director, one administrative assistant and one logistics/maintenance officer). Budget allocations should be made to ensure the sustainability of such posts.
- √ A funding source of mutual interest has been identified by MoD through its cooperation with the Ministry of Economy and Regional Development to eventually support business incubators in Serbia. Such synergy also takes into account the greater experience of the Ministry for Economy in running such activities as well as the idea to better facilitate the civilian reintegration of former military staff by avoiding structures that would be managed by the MoD for former MoD staff only.
- √ Former military personnel use available programme components on a voluntary basis. This is one of the challenging factors for the precise planning of the programme's scope. Hence, the experiences of countries that have already developed such programmes are very valuable, which may be couth through workshops and seminars.
- √ Experiences of the Serbian MoD show that it is necessary to fully separate the process of discharging personnel from the resettlement support process, i.e. fully separate the institutions implementing these processes. For discharged personnel, it is very often unacceptable that the same institution that makes them redundant, or decides on their discharge, is at the same time responsible to assist them in their resettlement.
- √ Training centres have been intentionally established outside MoD structures as experience has shown that discharged personnel no longer trust the institution responsible for their status, and are therefore reluctant and hesitant to approach it for any assistance. It can also be assumed that a pride factor comes into play, and neutral external partners may help bridge this gap.
- √ Motivation courses organised by MoD proved to be an important tool for starting the reintegration activities. Having the first contact with beneficiaries organised through MoD also shows the proactive role of the MoD.
- √ When defining caseloads and establishing a structure, it needs to be known that not all people will request assistance. As a general indication, approximately 40% to 50% of the caseload participating in counselling can be considered as a very good result. Similarly, achieving a rate of 50% of 60% of the counselled people requesting assistance is also a good benchmark.
- √ If the local infrastructures allow it, the best way to assist people in their reintegration is to support self-employment in micro enterprises (preferably in sectors of local economic growth). This support has an indirect impact on the local economy and can create additional job opportunities. Any resettlement activity should prioritise that assistance which receives more importance by local and international actors.

- √ The provision of loans is very complex and should be carefully analysed according to national legislation. While in post-conflict environments, laws might be very general than in more stable countries and it might not be cost-effective and/or much more complicated to run. In the case of Serbia, the issuing of new legislation complicated the opportunities for using donor funds to provide loans.
- √ Loans require significant financial expertise and maybe complex to manage. Time-permitting, it is advisable to rely on other institutions which are specialised and more competent to implement such a component.
- √ Grants are the best way to deal with large caseloads, but it is necessary to set up clear rules and adequate mechanisms. Grants should not be disbursed in cash but used to purchase equipment for beneficiaries or to subsidize employment, training or education.
- √ After the end of reform processes, it might be difficult to find the budget allocations for grants and other financial support (also international/external funding may be complex to access). Where this is the case reintegration institutions or programs should rely on the support of other structures, government structures, for example Ministry of Labour and Social Affairs, chambers of commerce, veteran associations etc. During the post-reform phases of reintegration could then rely on unequal schemes in support to business start-up such as tax exemption, free administrative fees or loans from the government.
- √ Retraining is the most viable and possibly least expensive way to provide assistance during and after the end of the reform. In order to ensure self sustainability and cost-effectiveness, it is recommended to build synergies with existing service providers.
- √ Business incubators are recognised as the most effective support to business start-up. When possible, the resettlement programme should build synergies with competent institutions to establish and/or cooperate with existing incubators.

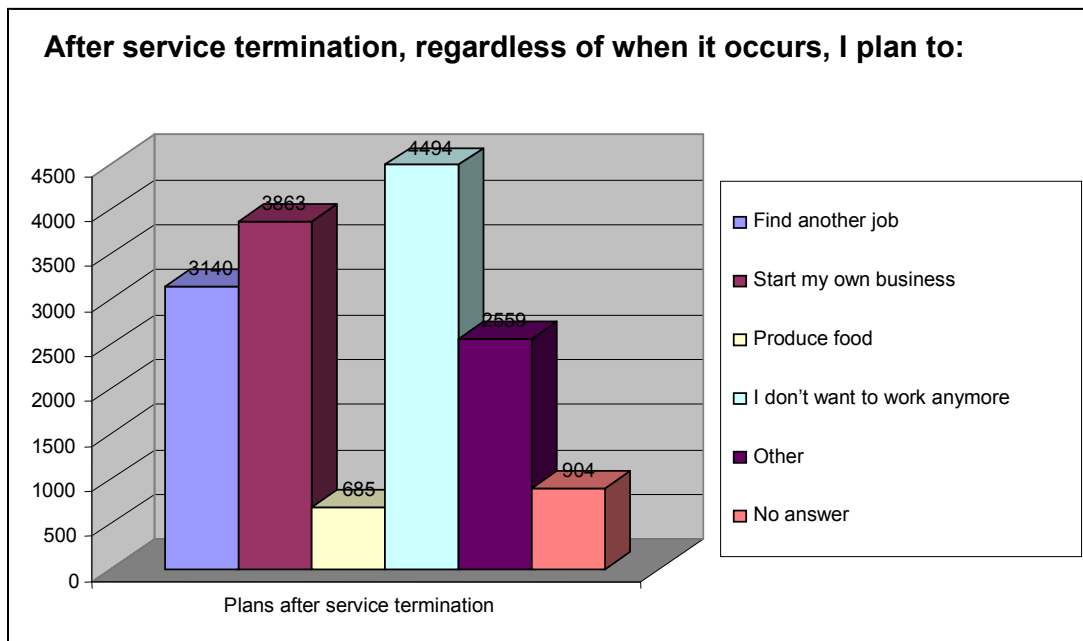
## 2.6 Resettlement Needs Assessment

In order to analyse the expectations of defence personnel being made redundant, a survey was conducted in 2006. That activity aimed to gather initial data on respondents' wishes with regards to future employment (per personnel category) after leaving the military organization<sup>12</sup>. Within the survey, answers to questions such as "What are your plans after service termination?" and "What type of support would you would like to receive?" clearly show that a significant number of people consider themselves as active and wish to work after they leave the service.

<sup>12</sup> **N.B.** Respondents include MoD personnel from the State Union of Serbia and Montenegro. Later that year Montenegro voted for independence. The above statistics are not unreliable considering the proportion of personnel constituting the army of the then Union.



Additionally, the collected statistical data show that the largest portion of respondents is looking for any forms of assistance (53.80%), while one third is planning its future without counting on external support (36.38%).



The findings of the survey were analysed and the following conclusions to guiding the whole PRISMA approach were drawn:

- A considerable number of defence personnel are motivated to continue a civilian career after leaving military service;
- Higher interest was expressed towards self-employment versus employment; and,

- The majority of respondents are favourable to the support the PRISMA programme could provide.

The survey proved to be an excellent tool for the planning and implementation of the PRISMA activities.

### **Lessons Learned and Best Practices**

- √ An assessment of needs of the potential candidates conducted before starting the activities is useful to define the structure of the intervention.
- √ Ideally this kind of assessment should also be replicated at different stages of the implementation to ensure the matching of the provided assistance with the real needs of the target group.

## **2.7 PRISMA: Programme Implementation**

Once the necessary legal framework is set, initial hurdles are overcome and the types of assistance to be delivered to the beneficiaries are defined, the programme is ready to commence interacting with beneficiaries.

This first concrete operational step is the actual registration of the beneficiary for the programme. Additional questionnaires have been developed to further assist the counsellors and case managers in providing optimal support to the client. Counsellors review the application forms and relevant questionnaires prior to the initial one-on-one orientation session with the client.

In the Serbian case, the registration process is different from the one applied in other contexts and cannot be assimilated to ad-hoc mechanisms usually set for the resettlement of large groups of staff within a defence reform process. Unlike the most common ad-hoc downsizing mechanisms, the one set in Serbia does not pre-identify a precise number of people to be downsized. Personnel is discharged at different stages of the reform adding to people that are made redundant those that decide to voluntarily leave the service. Therefore, the exact number of potential beneficiaries can only be calculated at the end of the reform process.

In other contexts, the MoD refers to the resettlement programme a list of names of all potential beneficiaries. Those people are then individually contacted and given the opportunity to register and access the reintegration assistance. At the end of the registration process it becomes clear how many beneficiaries there are and project activities can be precisely organised according to the size of the caseload, their location in the country, their social and economic situation as well as their skills and expertise. The fact that PRISMA (and the NTF) programme does not work with an already identified group of people makes the latter much more difficult.

PRISMA registration is an ongoing process and the final caseload will depend on the beneficiaries' response during the duration of the project/reform. For that reason, the project had to organise a parallel system where registration and assistance mechanisms are operating on an ongoing basis throughout the country. The collection of data about the registered caseload needs to be rapidly and constantly processed to allow a timely adaptation of the project to the needs of the beneficiaries and to reallocate resources and eventually adapt project activities.

It is evident that this system requires well-rounded cooperation among stakeholders as well as a clear and precise definition of roles and competencies. Monitoring needs to be constant to avoid mistakes that, in such a complex set-up, can compromise the entire programme.

Furthermore, it has to be clear that to keeping a registration process open throughout the programme can bring the problem of offering assistance to a number of people that is significantly higher than the one originally foreseen in the original budget. To avoid such problem, a constant review of the budget and the precise monitoring of the registration and assistance delivery processes need to be ensured; mechanisms to limit the access of beneficiaries to the project according to their vulnerability, skills or background need also to be pre-defined thereby rationing response while not overloading the process.

The positive side of having such a flexible and non pre-defined caseload is that the programme is able to adapt and respond to the needs of the beneficiaries at any given time.

### **Application Form**

Expression of interest in using PRISMA's services begins by completing an application form (Annex 1), which details the beneficiary's expertise as well as priority interests. The form is then submitted to the RRC in Belgrade, Novi Sad or Nis, depending on the candidate's place of service or residence. Applications are entered into PRISMA's database accordingly.

At this stage, beneficiaries may also be invited to undertake additional tests and questionnaires aimed at better defining their profile prior to the orientation session:

- **Personal Job Profiling:** The purpose is to identify the individual's preferences and match them with real competences. During the follow-up interviews, the results of this activity are used to present additional and more tailor-made employment opportunities.
- **Questionnaire on Values:** The main goal of this additional questionnaire is to collect information that would allow a prioritisation of the values that the beneficiary considers as most important in his future employment. This exercise provides an additional self-assessment tool vis-à-vis what they can expect from civilian employers.

- **Intelligence/Competence Type Test:** Specialised expert studies have revealed that every individual has more proficiency in at least one of the following seven principle competences: verbal, logical-mathematical, spatial, body-movement, musical, interpersonal or intrapersonal. An additional test aims at identifying and prioritising one or two (seldom three) of these competences. Of equal importance, this test highlights the least represented competence of the seven. Results are shared with the beneficiary to further streamlining employment possibilities or training opportunities vis-à-vis the initial request(s).
- **Ego Gram – My Personal Profile:** This tool allows an analysis of the Ego-state or Self (term used in *the Theory of Personality* by E. Berne) and represents a psychological approach to transactional analysis. It starts from the assumption that people are psychologically structured within the ego-state through a tripartite model Parent-Adult-Child. It states that every individual, at any given time, will show his/her ego-state as Parent-Adult-Child. All three are highly valued and should be equally respected and positioned in the productive life; however, the positioning of the incumbent into one of the three categories helps in defining his/her reintegration needs. This test is also used to confirm the objectivity of the “bystander” assessment conducted by the professional counsellor.

When the above tests are completed, RRC psychologists process and interpret the results and ultimately advise the beneficiary on the more successful reintegration paths, options and opportunities to a civilian life. Usually, the focus of the interpretation is on the emerged positive skills or competences but attention may be also drawn to weaknesses and/or lack of competences for specific jobs.

If the profile emerging from these tests appear to be problematic and the RRC counsellor deems it necessary that a certain individual may require further “special” attention, a standard set of instruments (competences tests and personality tests) can be applied. These tools, if necessary, can also be used for psycho-diagnostic purposes, before recommending more specialised psychological guidance.

In order to make the psychological support more effective, programme beneficiaries are obliged to maintain contacts with their resettlement advisers at all stages of the programme. During this relationship, beneficiaries may also be encouraged to expand their support networks beyond that of the RRC.

### **Orientation**

Professional orientation to programme users is based on direct counselling focused on providing information on labour market needs, professional assistance in job search and employment or business start-up as well as the organisation of motivation workshops and client networking. RRC staff prepare, monitor, and provide these services with the aim of increasing their opportunities for reintegration into civilian life while also raising self-esteem and suggesting alternative livelihoods to clients. At the same time, during the orientation sessions,

individuals are advised on the issues pertaining to the start of a new career in the civilian world.

Within that approach, RCC coordinators in the field units are responsible to provide basic information on the reintegration programme components and how to access them. This process mainly pertains to the economic reintegration of beneficiaries and looking at their economic self-sustainability. Once the orientation process is over, “beneficiaries” become “clients” and are asked to sign a contract with MoD, formalising their request to benefit from the various programme components. This contract regulates the rights and obligations of both parties.

The more social dimension of reintegration into civilian life also focuses on counselling. Each RRC is staffed with resettlement advisers and one psychologist. Assuming that the transition from military to civilian is a very stressful process for those leaving the service, preventive psychology becomes an extremely effective tool assisting both clients and PRISMA advisers. The main objective in providing psychological counselling is to help people to “change” their mind/attitude to possibly assist them in stopping their military way of thinking and try to adapt to the new civilian environment. That approach empowers them to start a new career, to raise their sense of being socially secure, increase confidence and self-esteem. Some simple techniques applied in the “changing minds” process include:

- Identifying transferrable skills and desirable traits (knowledge, experience, discipline, loyalty, punctuality, etc.);
- Matching expectations with real competences,;
- Update personal and professional competences in application forms during orientation and often reminding that they are at an age where they are expected to be productive members of society.

### **Retraining for the Civilian World**

Although special attention is paid to redundant military personnel who were educated in military schools and whose diplomas are not transferable to civilian structures, PRISMA’s philosophy is to recommend requalification training to all its users regardless of the path they intend to undertake in their post-military, civilian career.

Trainings range from job-hunting techniques, to business trainings and, or formal vocational training. To facilitate a quick reinsertion into civilian life, clients are offered retraining and requalification courses at the same level of the person’s respective qualifications, or at lower level of qualifications degree if the person wishes so. The courses are organized in separate training centres, and counsellors recommend courses in demand by the labour markets (as identified by the labour market surveys).

The quality of professional trainings organised under the auspices of MoD are constantly controlled and upgraded to be in line with the labour market needs and

the development of science and technology. The final objective is to provide the programme's beneficiaries equal employment opportunities in non-military structures and equipping them with skills and qualifications that are comparable or equal to those provided by other civilian structures.

Although all candidates that are eligible for PRISMA may express their personal interest into the different (re)training components of the Programme, priority is given according to specific and generic criteria also taking into account medical conditions and qualifications which maybe difficult to match with civilian jobs. Prioritization criteria also seek to include persons having:

- a) Unresolved housing issues;
- b) More dependants;
- c) Limited medical fitness for military service;
- d) Longer period spent in military service;
- e) Several transfers during military service;
- f) Willingness to accept employment anywhere on the state territory;
- g) Better service grades;
- h) Higher qualifications.

Priority criteria are set to be able to provide the assistance to those who are more in need when the available resources are not sufficient to target the entire caseload. In some instances, priority criteria are combined with tests to access the trainings. To ensure commitment and increase cost effectiveness, a candidate that has quit retraining of his own free will may not be re-referred to a new course, except if the termination is a result of his own illness or illness/death of a family member. A candidate who does not successfully complete the retraining he was referred to may also not be re-referred to a new course.

***Example:** At the time of writing, MoD retrained 238 NCOs and civilian personnel during four training cycles, a fifth training cycle is ongoing for an additional group of 66 persons made redundant. To date, the employment percentage following the training is a staggering 83%.*

*The Officers' Training Centres trained a total of 952 officers and civilian personnel. Planned training cycles at these training centres have now ended; the post-training employment rate among participants to those courses is of 51%.*

### **Additional Support**

RRC advisers may refer clients to jobs identified through networks established with other ministries, the NES and other associations according to the results of the above-mentioned screening counselling process.

If a client has secured the funds with which to start a micro or small enterprise or expand an existing one, or even join other entrepreneurs in the establishment of a joint venture, PRISMA counsellors refer the client to specialised agencies (preferably

public institutions) that are able to further assist the client with his/her idea (including the development of a fully-fledged business and financial plan).

Ideally, PRISMA should be given the opportunity to manage some reintegration funds or at least to refer its clients to existing schemes run by different state and/or non-state counterparts. At present, PRISMA is not in the position to provide financial support to the implementation of the beneficiaries' reintegration ideas through loans or grants.

### **Lessons Learned and Best Practices**

- √ When caseloads are exactly pre-defined and operations are to be implemented within a precise timeframe, it is possible to set up a resettlement programme with a fixed (and limited in time) registration period. This system would allow the study of the composition of the caseload and consequently the pre-definition of the programme mechanisms. In any other case, the system should be flexible and adaptable according to the changing needs of the different stakeholders defined through a well established monitoring and evaluation framework.
- √ Counselling is an essential component of the assistance. Through counselling it is possible to provide support in economic reintegration but also look at the social integration of the beneficiaries through that "changing minds" process that is essential for a sustainable reinsertion in the local communities.
- √ Specialised tests and questionnaires have proven to be a useful tool for supporting both the economic and social reintegration process. Through these tools, beneficiaries have the opportunity to assess themselves and clarify their objectives, while counsellors can better determine and recommend the most suitable reintegration assistance to beneficiaries;
- √ The impact of the psychological support on the sustainable reintegration needs to be well considered. Training in preventive psychology and identification of stress symptoms is recommended to all staff resettlement programme staff.
- √ As a general approach to facilitating quick reintegration, candidates should be given the opportunity to apply for a retraining course which provides an equal level of qualifications as the one they already possess (or lower); the gaining of a higher level of education than the one they already possess should be considered as an exception and should be adequately considered looking at the age, background and market opportunities. Resettlement programmes like PRISMA are designed to assist people to make the best use of their skills rather than gaining a higher level of education; moreover, such support would require higher amounts of funds and possibly longer periods of time.
- √ In the case where MoD may not be ready to address specific programme components, international partners may step in to ensure the smooth execution of the programme in support of MoD. Handover to MoD upon completion of the specific task assigned should be a requirement.

### 3. NATO - *Partnership for Peace* Trust Fund for Serbia

As a back drop to the NATO - *Partnership for Peace* Trust Fund intervention in support of Serbia's resettlement programme, it is of note that NATO - *Partnership for Peace* countries have already been supporting the defence reform efforts of Serbia, notably through a Tailored Cooperation Programme through projects aimed at the destruction of military hardware such as weapons and ammunition.

*Partnership for Peace* and NATO countries are also actively involved with bilateral programmes aimed at supporting the defence reform processes in Serbia.

In line with this above-mentioned cooperation programme, NATO - *Partnership for Peace* countries further engaged in strengthening the effectiveness of PRISMA by supporting the development of a permanent resettlement structure as well as aiding discharged defence personnel, including their families and dependants, to reintegrate into productive civilian life through the use of NTF grants and loans.

To further enhance the spirit of complementarity of the NTF linking that intervention with the reform plans developed by the MoD, the programme implementation period of five years matches the duration of the Serbian defence reform process. This has allowed the project to intervene when the political framework was already set and to count on mechanisms already in place.

When looking for a partner with experience and expertise in dealing with the socio-economic consequences of defence reform, the International Organization of Migration (IOM) with its world-wide experience in the field of assisting in the process of downsizing military personnel and contributing to their reintegration into civilian life was selected as the executing agent for this project.

This project (a component of the larger Defence Reform paradigm) should be seen in the context of strengthening the stability of civilian society, and not only as a purely military or defence related project. The role of IOM is highly important in ensuring that the focus of this project is on human security and social and economic development.

Within that context, the NTF was shaped looking at the past experiences IOM has in the region but also introduced elements that were not always included in this kind of projects. Because of this approach, the NTF for Serbia is the most modern and complete trust fund ever financed by NATO - *Partnership for Peace* countries.

The main features making this programme different from others developed in the past are:

- (1) The MoD is included in all stages of project activities and shares management responsibility with IOM for all actions,

- (2) The project was not designed as a specific response to a well defined and limited in time downsizing action, but as a long term intervention requiring the constant presence of capacity building in all components; and,
- (3) Creation of a flexible system able to respond to the possible changing needs and goals of the MoD.

With all operational steps and main decisions being shared and agreed upon between IOM and MoD, with the concurrence of the lead nation, Norway, there is some additional stress to the implementation of the project. Structures for the discussions of those issues and procedures for their approval needed to be established. However, the positive side of such an approach is that all main stakeholders are involved in the implementation of the project which then ensures ownership and commitment to the process. Such mechanisms allow further capacity building of the MoD staff through a combination of coaching and learning-by-doing approaches.

Those elements become even more important when considering that these activities are usually multi-annual and multi-component. Without the strong participation and involvement of MoD staff, changes in policies or governments might cause serious delays to the implementation or the termination of the activities as soon as the project is over.

The second new element is the result of a new approach to defence reform processes developed by Norway, MoD and IOM within the lines of the NATO – *Partnership for Peace* policy. In most of the cases, the request for assistance related to downsizing processes are posed by countries that need to deal with a large number of personnel to be discharged. The NATO – *Partnership for Peace* intervention is usually developed according to that request and looks into providing assistance to the requesting country in relation to the large caseload, leaving the local MoD structures to deal with the regular discharging after the end of that process.

In the case of Serbia, the downsizing issue was looked at from a different angle. The NTF intervention was never seen as a separate action aimed at assisting MoD in dealing with the exceptional downsizing of large numbers of military staff but rather like a complement to a process that was already started by the MoD intervening in supporting the establishment of structures, mechanisms and procedures as well as providing the unavailable financial support to the reintegration of the target group. Counting on the already established PRISMA programme, it was decided to focus on building the capacity of the MoD in dealing with any process related to the resettlement of personnel. The aim is to complement structures and expertise that would allow the MoD to cope with exceptional events like defence reform as well as the reintegration into civilian life of discharged servicemen.

Within this approach, mechanisms have been set so that all project activities include a capacity building component using a balanced mix of learning by doing, training

and coaching mechanisms. More information about this approach is provided in the section of this document related to capacity building.

The emergence of third element is somehow a direct consequence of the first two elements, but also a necessity for a system that is looking at long term and self-sustainable assistance rather than an ad-hoc response to a precise problem (i.e. downsizing of redundant staff). By setting up a system that is complementary to PRISMA and the defence reform process, it is necessary to allow mechanisms and structures to adapt to the changing needs of the MoD as well as to the consequences of possible new policies and goals and modifications to the initial reform set up.

The NTF project structure was created in a way to include rapid consultation and decision making mechanisms, where donors, MoD and IOM representatives could discuss possible changes in the programme as well as adequate responses to external events affecting the activities. Key elements of this structure were the Project Management Unit (PMU), the Steering Committee and the Donor Meeting Group.

It is clear that such a structure posed very relevant challenges to the implementation. That the target group of the project was not pre-determined, but defined every year by the MoD, posed serious problems in terms of budget requirements as well as the dimension of the structures. However, all those potential problems were controlled through a very well developed monitoring and reporting system.

### **The Trust Fund Mechanism**

During his visit to Belgrade on July 18, 2005, at which time the NTF programme was under discussion, the NATO Secretary General referred to Norway's readiness to take the lead on a NATO - *Partnership for Peace* Trust Fund for assistance to discharged defence personnel within the scope of defence reform in Serbia. Shortly after that, Norway formally agreed by taking up the role as the Lead Nation for the NTF.

The decision to establish a NATO - *Partnership for Peace* Trust Fund was certainly a positive development for the Serbian defence reform; however, in order to fully understand the impact of such tool both in terms of operations and policy support, the Trust Fund mechanism should be analysed from both the implementation and policy and financial angles.

Regarding implementation, Trust Fund gathered some of the major NATO - *PfP* countries, allowing the establishment of strong international political support to the action. Within the NTF mechanism, donor intervention in support to the NTF is gathered quite rapidly, if needed. On the other side, although the Trust Fund is a multi-donor action, the mechanism of the Lead Nation allows sufficient flexibility and coordination between the implementing agency, MoD and the donors.

In that sense, management of the Trust Fund at the field level does not require a heavy administration and does not impose excessive bureaucracy. More time consuming procedures and specific regulations do have to be applied at the Brussels level, but these are more related to the role of the Lead Nation. With regard to the Lead Nation, it plays an essential role both at the local and Brussels levels. Without the full commitment of Norway, both at the operational level in the field, ensuring adequate liaison with government counterparts and participation in decision making and implementation process, and at the more political and financial level in Brussels, ensuring liaison with other donors and fundraising activities, the Trust Fund mechanism in Serbia could not be so flexible and dynamic and consequently achieve the planned results.

From the financial point of view, it is clear that the wide range of operations planned over the five year duration had a great impact on the budget of the programme demanding for consistent financial support from donors. In that context, the Trust Fund mechanism facilitated the gathering of several donors that were contributing with relatively small but consistent amounts to a joint financial contribution. This system thus allowed the achievement of planned goals. The question remains whether a single donor could have provided the same amounts over the years of implementation.

Based on the Serbian experience, the NTF is a good tool for promoting the image of the NATO - *Partnership for Peace* within contexts that might not be familiar with such institutions. This element will be better analysed in the following sections.

### **Lessons Learned and Best Practices**

- √ There is no prescriptive approach to reintegration policy development. Each programme should be designed to meet the specific donor and host country needs.
- √ Each project needs to consider the environment in which it operates, especially at the development stage. Actions and activities that are possible in certain countries might not be allowed in other contexts.
- √ In defence reform, it is usually difficult to transfer models applied in past/different contexts. However, lessons learned can be successfully transferred.
- √ The Trust Fund is an excellent tool to gather donor interest allowing different players to play at the same table. Coordination and administrative issues are not necessarily problems, but much depends on the level of support and involvement of the Lead Nation.
- √ Identifying a Lead Nation at an early stage supports transparency and enables timely project implementation, since its role is essential both at NATO/PfP and field levels.

- √ The NTF project was designed to complement an existing government structure, and ensure the latter's capacity development. This ensured government ownership and lead to the further development of permanent structures.
- √ During implementation, operational activities are interdependent on political and social factors, both of which may cause delays.
- √ Consider the balance between the different goals to be achieved: response to potential security threats, social stabilisation, economic development, security sector reform, defence reform, etc.

### 3.1 ASSISTANCE TO REINTEGRATION

The previous sections in this document have detailed the processes and mechanisms leading to the establishment of PRISMA, and have concluded by specifying the dynamics guiding the establishment of a support instrument that are necessary to ensure the successful and effective completion of a resettlement programme. PRISMA's set up delineated through its eleven components constitute an excellent example of a resettlement system; however, due to a series of bureaucratic, legal, financial and administrative setbacks, some of the more important components could not be implemented at the initiation of defence reform, thus, hindering the programme's overall success.

In essence, although orientation and planning was well on track, the full set up of PRISMA mechanisms, including the provision of concrete assistance, could not be fully delivered, or at least not at the same time that defence reform started.

IOM, through the NATO - *Partnership for Peace* Trust Fund for Serbia, has bridged this gap by providing operational, administrative and financial support. IOM also provided expertise build the capacity of PRISMA to reach the necessary levels of experience and expertise that are required for successfully conducting its activities in support to discharged defence personnel, even after the completion of the NTF programme. Moreover, IOM provided needed assistance in the management of the grants and loans component of reintegration assistance and the ensured support to those made redundant through its Information Counselling and Referral Services (ICRS) and Reintegration Fund (RF) mechanisms.

As mentioned in the previous paragraph, unlike other IOM experiences, the NATO - *Partnership for Peace* Trust Fund for Serbia was designed to complement an existing policy and systems already established by the Serbian MoD. In this sense, the project was developed as a direct response to the needs of the Serbian MoD looking at three main components:

1. Counselling to discharged defence personnel through the implementation of the ICRS approach;
2. Support to the reintegration into civilian life of redundant defence personnel through the ICRS and Reintegration Fund (grants/loans used to finance business start-up/development, job placement and retraining); and,
3. Building the capacity of MoD to manage the downsizing processes related to defence reforms as well as the natural discharge of contracted soldiers moving forward into the future.

### **3.2 The Information, Counselling and Referral Service (ICRS)**

IOM's Information, Counselling, and Referral Services (ICRS) is a stabilization tool, specifically designed to support a smooth and peaceful socio-economic reintegration of select segments of the community while simultaneously enhancing the absorption capacity of the very same receiving communities. The ultimate goal of the multiple factors encompassing this process is to prevent any further instability, and, more importantly, to prevent a wide range of possible consequences that, depending on the local context, could vary from mere socio-economic tensions to possible the relapse of violence or conflict.

ICRS also reduces any security threat – be it perceived or real – by supporting socio-economic reintegration through the involvement of various community actors, thereby acting as a reconciliatory tool and building trust amongst all stakeholders.

Over the years, IOM has adapted its ICRS methodology to a broader spectrum of beneficiaries, including personnel made redundant during Defence and Security Sector Reforms, as well as those being resettled as a natural process of their respective employing institution or entity. ICRS has rapidly become a key tool for the effective socio-economic reintegration process of over 2,800 persons in Serbia, and more than 280,000 persons globally. These numbers continue to grow as other IOM ICRS programmes are being implemented worldwide.

Understanding the overall contextual setting surrounding the beneficiary, ICRS is a platform that manages beneficiary's' expectations through informed and sustainable decisions. ICRS aims at providing regular, ongoing and continuous support to the beneficiary until their expectations are met within the given contextual realities and programmatic limitations.

#### **The ICRS Mechanics**

The ICRS is a tool that IOM has developed through its worldwide operations over the past 20 years. The ICRS model is consequently a general instrument adaptable to the local environment to adequately respond to the needs of the target group as well as

the local socio-economic and security conditions. Within the Serbian context, the ICERS mechanics were organised according the following scheme<sup>13</sup>:

- a. **Information to Beneficiaries:** direct mailing and phone calls to all beneficiaries; 126 promotion activities for 1,778 participants in over 24 municipalities;
- b. **Information to Stakeholders:** website; newsletter; field visits with donors; 10 press releases, 92 articles on national/local newspapers; 28 TV and 11 radio emissions;
- c. **Counselling to “Change Minds”:** psychological support, problem analysis, one-on-one discussion;
- d. **Counselling to Manage Expectations:** business plan development, document preparation, labour market survey;
- e. **Referral Services:** job placement, job fairs, seminars, workshops and meetings with employers and their associations

An essential element of the ICERS is the correct set up of the offices where the beneficiaries will receive assistance. In order to allow an equal distribution of the caseloads between the offices and ensure the provision of equal levels of support and assistance to the beneficiaries independently from the place they reside, the areas of responsibility of the project need to be carefully assessed looking at the available funds, number of beneficiaries, available means of transport and road/transport system. A correct distribution of the offices will enable easier access to the programme for a higher number of people.

### **Information to Beneficiaries**

- **Pre-Counselling Information:** For the effective implementation of any programme, all stakeholders must be well informed on the realistically achievable results and limitations of each party. Serbia’s resettlement system envisages that all programme beneficiaries are first counselled at the RRC, after which they are referred to IOM for assistance as necessary. This approach ensures that the beneficiary approaching IOM for assistance is informed on the typology of assistance IOM can deliver.

Within the Trust Fund for Serbia, the target group referred by MoD has been approached and informed through a combination of outreach and information dissemination strategies, aimed at increasing the awareness of the potential beneficiaries and other relevant stakeholders about the project. In line with the Law on Privacy, the project has developed a system of direct mailings to eligible discharged defence personnel referred by the MoD, as well as a system of phone calls to potential beneficiaries who either did not contact NTF staff after the mailing or did not submit an application after registration. Experience indicates that this kind of communication is very

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<sup>13</sup> Data as of 30 April 2009

effective at providing more personalised information to beneficiaries and fosters a more systematic and organised in-flow of registrants at the NTF offices (through the scheduling of individual meetings).

The NTF team has organised a range of promotion activities in different municipalities in Serbia. These events included a presentation of the project, detailed explanation of the rules and criteria, examples of concrete assistance (including promoting the success stories of programme beneficiaries), questions and answers, and an opportunity to register for the project.

- **Beneficiary Information (Registration):** The beneficiary registration process gathers key biographical data on the education, skills, and socio-economic expectations of the potential beneficiary. This information is of great use in streamlining and prioritising the socio-economic data gathering. Beneficiary expectations delineated in their respective registration forms enable the ICRS counsellors to provide sustainable, economically sound, income generating opportunities for the beneficiary.

Registration is the start of a process that might last a few days or months. Simultaneously, beneficiaries receive professional advice on how to combine their individual capacities, experience and expertise with the NTF assistance to achieve a sustainable reintegration into civilian life. During the registration and initial counselling sessions, beneficiaries have the opportunity not only to discuss issues related to their economic reintegration into a productive civilian life, but also to the social security aspects of their reintegration.

## **Dissemination of Information to Stakeholders**

The outreach and information dissemination strategy is a key tool to disseminate information about the project and promote awareness within the MoD, among potential candidates already made redundant, as well as to the local government and business communities. Additionally, within the frame of the information dissemination strategy, the project has been able to contribute to the promotion of the positive image of the NATO - *Partnership for Peace* in the country.

At the onset of an ICRS programme establishment and implementation, information is disseminated by ICRS programme staff directly to the envisaged beneficiaries in their respective locality or work settings. These informative events usually include a presentation of the project, detailed explanation of the criteria, examples of concrete assistance with presentations from beneficiaries that may have already received NTF project assistance, questions and answers session, and the opportunity for participants to register for the project. ICRS staff provides timely, accurate and unbiased information on the programme and what it can offer to its users. Periodic presentations are also delivered to programme partners and potential stakeholders (e.g. training centres, educational institutions, business leaders, potential employers,

chambers of commerce, investment promotion agencies, etc.) whereby the ICRS concept is promoted as a sustainable tool beneficial to all parties.

All information and data gathered is collected in a Reintegration Database and Information Management System ensuring transparent management and effective delivery of assistance to the individual beneficiary.

A monthly newsletter, the NTF fact sheet and website, regular communication with national and local media, and promotional and visibility material (posters, leaflets, etc.) are the information dissemination tools developed by the NTF with the aim to provide regular information to project stakeholders.

### **Visibility**

In addition to promoting specific programme activities, visibility keeps stakeholders and the general public informed on the scope and purposes of the programme. The NTF programme has taken the following visibility measures during its implementation:

- All materials produced by the project (including regular correspondence) include general information about the project/donors and display relevant logos (for the NTF Serbia: NATO - *Partnership for Peace*, Norway, MoD, PRISMA and IOM. Some of the materials targeting a wider audience also include the flags of all NTF donors).
- In all contacts with external counterparts (including media and press offices), reference to project donors and the framework provided by the NATO - *Partnership for Peace* are mentioned.
- Visibility materials are produced and disseminated to select stakeholders in Serbia as well as to institutions operating in neighbouring countries on similar projects, embassies and to NATO HQ.

Information dissemination to stakeholders allows them to promote the programme themselves, and suggest or recommend programmatic synergies and programme support within their capacity and interest.

In the specific case of Serbia, the visibility of the NATO - *Partnership for Peace* activity is one of the key elements that could serve as a possible additional goal of the intervention. Considering the background of the Serbia-NATO relationship and looking at the recent membership additions of new countries in the NATO - *Partnership for Peace*, the importance of adequately publicising to the general public that the support is provided by the NATO - *PfP* countries cannot be overstated.

### **Counselling “Changing Minds” Approach**

Counselling is ICRS’s confidence-building mechanism. It is often the first and direct contact and an important dialogue with the user and it is where reintegration expectations are managed. During one-on-one counselling, beneficiaries have the opportunity not only to discuss issues related to their economic reintegration into a

productive civilian life, but also to get psychological and problem analysis support related to the social security aspects of their reintegration and how to change their military mindset. During the personalised and professional counselling sessions, the beneficiary is informed and advised on the existing options and reintegration opportunities (employment, training, business creation, joint ventures, etc.).

The registration and pre-counselling process is one of the most relevant elements of the project even when it does not lead to an application. Pre-counselling discharged staff enables them to engage into a dialogue with people that are ready to help and assist them. That process lowers the tension and resentment that very often accompanies discharged staff. This limits the opportunities for those people to get involved into problems that would most likely affect the security situation both at the local and regional levels.

Counselling is not just a one-time event, but an ongoing process executed throughout the life of the reintegration programmes. For example, once an individual project is approved and implemented by a user, ICRS staff will monitor the individual project will continue to provide counselling and advice to the individual beneficiary in light of newly gather information on new initiatives related to his/her project's interest. Furthermore, because ICRS adopts an open-door policy, any beneficiary may approach the ICRS offices at any time for further advice, guidance or support in the implementation of the respective micro-project.

While a large number of potential beneficiaries have visited the NTF offices and started to discuss with both MoD and IOM staff about the opportunities offered by the project, not all of these visitors have immediately declared their interest in the project and started to work on their NTF application. In the majority of the cases, interested people have decided to register and attend the first counselling session, but they have left without making an application. For these people, the "changing minds" approach is essential. Without having an impact on the military way of thinking of the majority of the beneficiaries, it is not possible to expect that they will be able to actively and successfully engage in any reintegration activities.

In order to continue assisting people that are still undecided in changing their minds and define the type of assistance they need, the NTF team has set mechanisms that allow the programme to be proactive rather than reactive to the action of the individuals. A system is in place to continue promoting the programme through direct phone calls encouraging potential candidates to come and register as well as to registered beneficiaries to further develop their business ideas.

Group counselling has also been practised by IOM's ICRS, and is more often than not implemented in those remote areas that are not as easily accessible by ICRS staff.

Because the transition to civilian life is a difficult process for most discharged defence personnel, even after pre-counselling, a large number remain undecided as to what sort of activity is best suited to their needs. In the following counselling

sessions, NTF counsellors provide individual counselling to each beneficiary on a fit-for-purpose basis helping them to identify the best possible reintegration option.

### **Counselling to Manage Expectations:**

IOM gathers basic, detailed and specific information on trainings, local economy, labour market, SME regulations, business registration, and other information of possible interest to the beneficiary, including local economic initiatives and incentives on SME development. These services are then mapped by sector and geographic location, to be made readily available to the beneficiary during initial counselling sessions. This information is regularly updated to match the needs of every single beneficiary in a tailored manner, and efforts are made to ensure programmatic synergies with existing local, regional and international programmes when and where possible.

It is evident that preferred economic sectors are likely to offer the best opportunities for growth and expansion, providing the necessary absorptive capacity to programme beneficiaries as well as to any jobseeker on the market. These sectors not only create employment, but over time may generate other support services create additional employment opportunities.

Outreach – often referred to as the backbone of the ICRS approach – encompasses all activities pertaining to the gathering of information and data of interest to the programme beneficiary and, where possible, to the communities where ICRS projects will be implemented.

Using the most up-to-date information on labour market trends, job opportunities, as well as beneficiaries’ needs and preferences, the NTF counsellors are able to provide better individualised assistance to programme beneficiaries. This includes market needs, employment trends, business regulations, agricultural subsidies, and training opportunities.

Following the approval and subsequent implementation of individual projects, IOM staff makes initial monitoring visits, which present an excellent opportunity for additional counselling by IOM counsellors to the programme beneficiaries.

### **Referral Services (RS)**

In light of the information gathered at the field level, and after identifying the individual reintegration expectations during the counselling session or sessions, ICRS seeks to deliver concrete assistance by referring the beneficiary to the optimal and most sustainable reintegration options or path to the same.

As with counselling, referral is equally an individually tailored service considerate of the beneficiary’s knowledge and skills, his/her expectations and aspirations vis-à-vis the existing market and support opportunities readily available. In order to facilitate the beneficiaries’ access to the labour market, the NTF has also organised and supported the developed of links with a number of employers’ associations, SME

development agencies, and chambers of commerce interested in cooperating with NTF beneficiaries. Workshops and seminars to facilitate contact between potential employers and beneficiaries have also been organised by the NTF.

In spite of the established referral mechanism, it has to be noted that the NTF has always tried to support the efforts of its beneficiaries rather than to act on their behalf. The main principle of this approach is to empower individuals so that they can take the future into their own hands and successfully reintegrate into civilian life without relying only on external assistance.

### **The ICRS Reintegration Fund (ICRS RF)**

Where possible, the ICRS programme attempts to refer beneficiaries to existing opportunities at no cost; however, this is not always possible. In fact, a core component of the ICRS programme is its Reintegration Fund. Nevertheless, it is important to note that it is not an entitlement. This fund is used to financially support and strengthen the reintegration opportunities and support services identified by the ICRS staff for the individual beneficiary's respective socio-economic reintegration projects.

The intended purpose of the RF is to kick-start individual or collective projects by providing the necessary financial support for their establishment. The RF may cover the costs for any of the following actions:

- purchase of tools, equipment, farming machinery, livestock and/or raw material;
- upgrade an existing business;
- pay for registration and tuition fees for trainings or adult education courses;
- serve as a stipend/salary subsidy during on-the-job training.

At no time during the life cycle of any ICRS activity is cash handed out to the beneficiary. Even in the instance of salary subsidies, funds are channelled to the beneficiary through the employer.

The ultimate goal of the ICRS Reintegration Fund is to ensure that the end users are socially and economically reintegrated within sound, sustainable business. To the extent possible, businesses that are established with RF support should contribute to the economy by generating or creating new opportunities within the same communities. To ensure this, the ICRS Reintegration Fund must remain a flexible, non-bureaucratic mechanism, easily accessible to ICRS staff and users.

Finally, an additional element that can have a great impact on the time for processing an application is the type of business chosen by the beneficiary for his/her reintegration. It may not take less than a month to disburse the assistance for the establishing of a business as the beneficiary needs to register his/her company and fulfil all his/her obligations before receiving the NTF support. On the other side, for those that request salary support assistance, it may take not more than a week to finalise all contractual obligations with the employer.

As mentioned above, the NTF approach to reintegration focuses on the support to the ideas and solutions identified by the beneficiary. The NTF serves as a tool that the beneficiary can use to achieve the goal s/he has identified during the counselling counting on financial assistance as well as operational support and qualified advice. If that specific approach appears evident in the context of business establishment/development, further explanation might be given for the other reintegration options offered by the NTF.

Within the education, training and job placement options, the NTF has tried to help beneficiaries to identify the best training or possible employment, but leaves to each individual the opportunity to find the most appropriate service provider or identify the possible employer. Within this process of self-confidence building, the NTF is ready to re-intervene to make sure that the provider/employer is serious and operates according to the relevant standards and/or when the beneficiary cannot progress without support.

### **Socio-Economic Reintegration**

The ICRS, in concert with its RF offer the wide range of services described below to its users. The choice among the different options is made according to the skills, experience and expertise of each beneficiary; however, in order to increase the opportunities for sustainable reintegration, beneficiaries are given the opportunity to combine different options within a specific budget and time limit. In the case of the NTF Serbia, the limit was set in 1,500 EUR to be spent within the life period of the project.

- **Education:** Education is one of the various opportunities offered to ICRS users, since beneficiaries often want to either continue a previously interrupted education or simply wish to attain formal education or pursue a specialization in a specific field of interest. The ICRS at all times ensures that the school is formally recognised and able to issue a certificate to this effect.

The ICRS RF encourages beneficiaries to choose part-time enrolment in order to allow them time for part-time income generating activities, unless the beneficiary is able to economically sustain him/herself until the completion of the degree or course..

In the case of Serbia, the vast majority of beneficiaries already have formal education and are therefore not in need of formal education and/or specialization. Moreover, there are courses offered to the beneficiaries through the PRISMA/NTF mechanism. In this sense, the education support offered in Serbia is complementary to the already existing support and covers retraining opportunities not provided by PRISMA and in fields jointly identified with MoD.

- **Job Placement or Direct Employment:** During the information gathering component of the ICRS, employment vacancies and opportunities are identified and sought by the ICRS staff. They are recorded in the database and shared with beneficiaries interested in employment as their preferred reintegration option.

This service is often carried out without any additional costs incurred since beneficiaries have a skill required by the employer and it is only a matter of matching the demand with the supply.

Recognising that job-seeking in the civilian world is quite different from career progression in the defence system, the ICRS provides seminars on interview modalities, CV writing courses and advice on job hunting techniques. This further builds the confidence of the ICRS user.

In the case of Serbia, this component is primarily implemented by PRISMA staff. PRISMA has also been able to conclude agreements with public institutions, such as the Ministry of Justice, by which qualified redundant personnel are given priority in accessing available posts.

- **On-the-Job Training (OJT):** An alternative to formal vocational training, OJT is often a more practical, hands-on approach benefiting both the employer and the beneficiary. ICRS ensures that OJT activities are in line with formal education standards, and the skills taught in a workshop are transferable. The ICRS RF may be used in this component by either paying for specific courses for the beneficiary, or by contributing with the purchase or raw material to the employer, who in turn incurs the (nominal) stipend costs enabling the beneficiary or apprentice to maintain a basic standard of living until full employment is sought. The principal idea behind this initiative is for the beneficiary to prove him/herself in the workplace and eventually secure long-term employment. In the case of Serbia, this reintegration option did not find much application; in the majority of the cases, training was inserted already in the job placement/direct employment scheme.
- **Vocational Training:** Vocational Training is offered to beneficiaries wishing to either build a skill or further develop an existing one, thus improving their chances to secure a sustainable employment. Similar to formal education criteria, ICRS will ensure that Vocational Training Centres (VTCs) to which the beneficiaries are being referred to be recognised by the Ministry of Education or the relevant ministry, and able to issue certificates to this effect. Developing the skills of an individual has an impact on the immediate community, as the community can benefit from the services of qualified experts.

As previously outlined in this document, within the Serbian experience, MoD was responsible for providing vocational training services either directly or through the support of different donors. The NTF, in coordination with MoD, allowed applicants to access vocational training courses offered by local providers in areas different from those already covered by the MoD.

- **Small Business Training:** To ensure the sustainability of businesses being supported and empowered by the ICRS RF, the ICRS requires that a business plan be devised and submitted to the ICRS business specialists and advisors for endorsement. As is often the case, ICRS users may not be equipped with the

necessary skills to develop a business plan and respective financial analyses to complete the plan's viability. Business trainings also include marketing tips specific to the context and location of the business.

The ICRS provides and invests in business trainings as time and again successful businesses benefiting from ICRS-RF assistance have become employers themselves.

In the Serbian case, the approach to this option was different with resources invested in building the capacity of the MoD and NTF staff so that they were able to provide some basic small business training as an embedded element of the counselling. More advanced courses were offered to beneficiaries as part of the education option.

- **Micro and Small Enterprise Start-Up and/or Expansion:** In addition to business training, and business plan development, ICRS further supports users through the ICRS RF. Such assistance may include the purchase of tools and equipment, raw material, finance a marketing campaign for the venture, pay business-related establishment/registration costs, or any combination of the above. ICRS supports the establishment of newly developed enterprises as well as the expansion of existing ones (be they family businesses or joint ventures).

In the NTF experience, the best tool to finance this option is the loan. Already existing businesses do not have to cover all those start-up costs that are necessary to register a business or to start the activities and can afford repayment schemes without compromising their business.

- **Agriculture Support:** It is not uncommon that a number of ICRS users request support in the agriculture sector. This is stirred by a variety of factors, including the laws and customs of a people, the nature of the land in a given setting, as well as several other factors. Assistance may come in the form of tools, and equipment but also livestock, seeds and such other assistance enabling the start-up or the further development of an existing small business.

## **Legal Advice**

Incorporating learning from over 20 years of ICRS implementation in different and often unique settings, ICRS engages legal advisors to support ICRS users opting for business and employment-related options. The legal advisors advise the users on the necessary paperwork for the establishment of a business, and, or regulates employment contracts between employer and employee (ICRS user).

### **Lessons Learned and Best Practices**

- √ A reintegration tool such as the ICRS must look beyond provision of individual reintegration projects; where possible, it should link with government development programmes.
- √ To maximise the impact, programme synergies with existing programmes outside ICRS and PRISMA should be sought.
- √ Counselling is an essential part of the support to redundant personnel and should be developed along two main objectives: economic and social reintegration. Economic counselling should look into ways to reach a self-sustainable civilian life and social counselling should look more into the “changing minds” approach bringing beneficiaries to think/ behave as civilians.
- √ Laws on privacy may prevent MoD to share information on potential beneficiaries, but necessary measures must be taken to ensure that programme information reach the end user (registration forms, address of resettlement centres, etc.).
- √ Important to leave the initiative on the reintegration process to the beneficiaries; programmes like the NTF should support and enhance individual initiatives rather than offer a fix solution to the beneficiaries’ problems.
- √ Resettlement centres should be located outside military structures, and manned with civilian counsellors.
- √ It is difficult to calculate the time required for the pre-counselling and counselling activities since it is a constant activity within the programme’s cycle.
- √ The amount of the grant/loan is of lower relevance when compared to when and how it is delivered as well as its flexibility (flexible amounts for the grants and possibility to combine assistance schemes);
- √ Combination of retraining and economic support to enhance opportunities for reintegration into civilian life.

### **3.3 Monitoring and Evaluation**

#### **Monitoring Individual ICRS-RF Projects**

Monitoring is a continuous activity and an integral component of the ICRS programme cycle. By monitoring ongoing ICRS projects, ICRS staff systematically collect data on specified indicators, providing management with the necessary tools for further developing and enhancing programmatic interventions, and thereby swiftly achieving the preset objectives and/or taking corrective measure when and where necessary.

IOM uses programme staff of one office to monitor and report back on the projects of a different field office. This ensures transparent and unbiased feedback on the

monitored projects, simultaneously allowing field staff to familiarize themselves with different interventions and initiatives outside their immediate area of responsibility.

Within the NTF, IOM has developed a Results Framework to be able to monitor, follow up and analyze the progress made and results achieved. The monitoring system includes three levels of operational monitoring. According to this system all beneficiaries have been submitting, through a standardised form, regular feedback on the proceeding of their respective businesses. The client monitoring form includes questions related to obstacles and opportunities faced by the beneficiaries and is filled out every four months. As a second level of operational monitoring, the information collected through the client monitoring forms is then checked and further assessed through regular field monitoring visits. The third level of monitoring is performed through an anonymous survey on a representative sample of the assisted beneficiaries.

These three levels of monitoring provide for a set of qualitative and quantitative data that enable the cross checking of the collected information and a realistic evaluation of all aspects of the project impact. The wide range of information collected covers all three major segments of the NTF project: client economic sustainability, social reintegration (including security-related issues) and capacity building of PRISMA/MoD.

In addition to the results framework, a more regular monitoring mechanism has been set up. In this system, NTF staff visits beneficiaries at the time of application submission to make sure that all that is included in their documents is accurate and that their proposed activity looks viable. After approval of the application, visits are conducted on a regular basis to ensure that funds are used according to the NTF rules and regulations and according to project's aims and principles.

Within the monitoring system, staff are allowed to take the necessary corrective measures whenever the beneficiary does not follow these guidelines. As a last remedy, if the beneficiary does not take the requested actions, it is possible for the NTF to withdraw the provided assistance.

### **Evaluating ICRS Programmes**

Evaluations on the other hand are devised to determine the impact a programme has and the sustainability of its results vis-à-vis resources allocated to that same programme. In order to objectively determine this, external evaluators are contracted to undertake such an exercise. A mid-term evaluation of project implementation, advising on possible corrective measures in case where a specific programme component may have fallen short of expectations, is carried out.

A final evaluation is carried out at the end of the programme determining the programmes overall impact through a set of objectively verifiable indicators.

It is advisable to undertake evaluations also one year after a programme's complete closure so as to measure the long-term effects and impacts not only at the individual level, but also on the community at large.

***N.B.** Although self-monitoring and evaluation are simple and fast in nature, under no circumstances should they be seen as a replacement to external M&E activities. Costs for the latter must be allocated in the budget, including travel costs within the country of implementation, reporting costs, publication costs, etc. Programmes often have at least two evaluations: Mid-term and Final, and sometimes one year after programme closure. These costs should be reflected in the budget.*

### **Lessons Learned and Best Practices**

- √ Capitalise on the experiences and lessons learned.
- √ The results of external evaluations should be seen as opportunities to revise project activities and eventually refine original goals.
- √ In cooperation with donors and main stakeholders recommendations from evaluations should be analysed and eventually inserted in the original project document.
- √ When dealing with important budgets to be spent in a multi-annual programme it might be useful to conduct a mid-term financial audit.

## **3.4 Transparency and Anti-Corruption Measures**

In its capacity as the executing agency, IOM administers and accounts for the funds expended at all stages and phases of the NTF programme including funds disbursed to each of the 2,800 individual programme beneficiaries.

IOM has institutional financial regulations which include maintaining detailed track records and accounts of all expenditures that are regularly shared with the Lead Nation as part of interim progress reports. These regulations are designed to ensure proper management of the resources as well as cost effectiveness and transparency and are applied to any IOM activity. In view of the thousands of individual micro assistance projects, and the large amount of funds to manage over a period of five years, IOM together with the Lead Nations and MoD decided to develop additional mechanisms to prevent fraud and simultaneously eliminate risks of corruption.

Transparency is further ensured by presenting the various financial disbursement mechanics to a Joint IOM/MoD Review Panel (JRP) for their approval. The involvement of such a mixed group of people makes it more difficult for beneficiaries or service providers to exercise any pressure in their own favour.

All payments are made directly by the IOM to vendors for the goods or services selected through a bid procedure. As a first step, an initiative to identify and select the goods and/or service provider/vendor is left to the applicant. NTF staff assess the reliability of the proposed provider/vendor as well as the quality of the goods before proceeding with the purchase. With this system, service providers that would like to have preferential treatments have to exercise their lobbying at two different levels, making their efforts more complex at the operational level and less profitable financially.

Moreover, a check related to the price of the goods is conducted through a mechanism of three bids obtained by different companies for the same item. Through this process, the vendor/provider that can be assured the most cost effective service is selected.

To ensure additional transparency to the activities, no agreements are made with service providers for group offers or the provision of a specific good. The initiative is individual and always starts with the proposal of the beneficiary. Additionally, a complex system of monitoring and evaluation allows the NTF to ensure the actual delivery and use of the purchased equipment according to the NTF principles and regulations. Through periodic visits as well as crosschecking of NTF data with existing databases maintained at different public institutions, including the Ministry of Economy, misuse of funds by beneficiaries can be rapidly discovered.

At the programme level, transparency is also ensured through a mechanism of periodic external evaluations and financial audits. These tools allow donors and NTF management to have an independent overview on the activities as well as an objective evaluation on the progress made against the goals to be achieved.

### **Donor Visits**

Further to the JRP approval on programmatic disbursements and bureaucratic procedures of the same, transparency at the field level is ensured through regular donors and JRP member visits. This provides visitors with an opportunity to meet beneficiaries who have already benefited from several steps of PRISMA and NTF assistance: from registration, to counselling, up to receiving of direct concrete assistance in pursuit of their reintegration goal.

### **Lessons Learned and Best Practices**

- √ Involving donors and national counterparts at every stage of the programme may slightly delay implementations; however, it ensures that hurdles are overcome at their very onset.
- √ Transparency and anti-corruption methods should look at procurement issues and interactions with beneficiaries and service providers, but also at good management and relations with donors.

- √ Transparency and anti-corruption methods must be endorsed by donors and national counterparts before programme execution.
- √ Donor field visits to individual projects ensure a full understanding of the programme's achievements, as well as increasing transparency at all levels.
- √ External independent evaluations as well as financial auditing are essential transparency and anti-corruption tools, especially in multi-annual programmes.

## 4. Capacity Development of Government Institutions

As previously recommended, international partners jointly implementing such programmes should always include a capacity building component to national counterparts. Strengthening the capacity of the MoD counterparts to independently conduct downsizing activities in the future should be the ultimate goal. In this case, it should include strengthening the government ability to organize and conduct activities that would support the reinsertion of the discharged personnel into civilian life. To improve the MoD/PRISMA capacity to manage downsizing processes, the NTF has designed the following components:

- Instituting a Joint Review Panel including donors, MoD and IOM which establishment and revision of programme policies as well as undertake regular monitoring of project activities;
- Undertaking programme activities and developing programme policy jointly with MoD activities to ensure continuity beyond IOM's cessation of activities. Staff training and participation to international events included the participation of MoD staff when possible;
- Refurbishing and equipping offices as well as the design and upgrade IT systems are additional forms of building the capacity of counterparts to ensure adequate programme execution;
- Assisting the government with establishing Business Incubators, including oversight of training MoD staff who would also manage the business incubators was implemented by IOM under the capacity building component of the programme. This came at the request of donors, on the basis of a recommendation made by an independent evaluator;
- Development services and identify synergies and partnerships with other institutions;
- Document the multi-annual PRISMA and NTF programmes, capturing experiences and best practices;

### 4.1 Joint Review Panel

Specific mechanisms like the JRP and the PMU have been set up to enhance the opportunities for cooperation among all stakeholders as well as for capacity building purposes. The JRP is the forum where the activities to be financed are analysed and discussed and the field activities are reviewed. Through the JRP meetings MoD counterparts not only have a direct control over the implementation of the project but also directly participate in the management of its activities.

Similarly, the PMU is a mechanism set for discussing policy and management issues with donors. This co-management gives MoD staff the opportunity to further

increase their familiarity with all aspects of the reintegration process and to gain direct experience on operational and policy issues.

## 4.2 Training Activities<sup>14</sup>

As a part of the regular capacity building activities, NTF organised training courses for the PRISMA staff with the aim of further increasing the MoD capacities to conduct similar supporting activities targeting discharged defence personnel in future downsizing and reintegration activities once the NTF project ends.

Within the Serbian experience, the identification of the curricula has been jointly defined by the MoD, the IOM and an external consultant. This process has allowed the programme to reach a high level of commitment in the participants as well as a self evaluation of the individual strengths and weaknesses.

***Example:** In the period January – June 2008, the NTF organised two different training seminars in each of the three Regional Resettlement Centres, targeting a total of over 20 MoD and NTF field staff. The first training sessions consisted of a three-day seminar on advanced communication and negotiation skills (February 2008) while the second two-day workshop focused on team building techniques (June 2008).*

*These trainings responded to the need to strengthen the advisors' counselling skills and also built on the skills and capacities achieved through three other activities already conducted in 2007. Following the well-tested mechanisms used in previous trainings, the curricula included regular teaching sessions as well as learning by doing modules. In order to build synergies with local existing initiatives, this training was implemented by the Academy of Banking and Finance (ABF), established under the auspices of the National Bank of Serbia. More detailed information on the training activities is included in the annexes to this report.*

*The training curricula were well received and the MoD asked IOM to continue this type of activities in the future. Similar activities are also planned for the next reporting period.*

In addition to formal training, capacity building has been ensured through a combination of learning by doing and coaching techniques. The fact that MoD staff is involved in the implementation of all NTF activities exposes them to a wide range of situations that create a sort of continuous training where the IOM staff play the role of support and a resource person as needed.

## 4.3 Refurbishment and Equipment of Offices

In order to make the interventions self-sustainable, it is necessary to make sure that the structures are adequately set up and equipped. In many circumstances, the financial constraints of the local MoD do not allow for adequate progress in this field and operations cannot be properly performed due to the lack of investment.

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<sup>14</sup> See Annex 5 to this report

Considering that the running costs for the structures are usually not very high and very often already included in the regular MoD budget, it is good practice to utilise project funds to finance the setting up of such structures focusing on the provision of equipment, furniture and the reconditioning of existing offices. Looking at the cost-effectiveness of the intervention, the building of facilities as well as the involvement in major re-construction intervention it is not advisable.

Within the NTF, funds have been allocated to the refurbishment of already existing facilities with interventions that have included painting of walls and provision of desks, tables and other pieces of furniture. On the equipment side, the NTF has provided IT equipment.

#### **4.4 Upgrade of the IT System**

An important element of the capacity building component concerns the upgrade of the IT system of the PRISMA and its field offices, to ensure that the required technical support for the implementation of the project activities is available in a format that would allow its long term use as well as through the use of modern software and hardware. The hardware equipment for PRISMA was provided by the Council of Europe Development Bank.

At the starting of the project the NTF has provided software to the PRISMA IT system to allow the creation of a modern network for the exchange and processing of data. After the first year of activities the NTF financed the development of a database system that would be able to interact with the one developed by the NTF and take over the processing of the NTF data at the end of the project.

#### **4.5 Business Incubators**

Business incubators are an excellent tool for developing new businesses and reduce the major problems and constraints that very often result in the new activity's failure. The creation of links between NTF supported new businesses and business incubators should be considered as a priority in the process of the reintegration into civilian life of former military personnel.

Ideally, projects that are dealing with redundant personnel should include the set up of an incubator where beneficiaries would have the opportunity to develop their business. However, the cost of setting up an incubator, as well as the limited capacity of the MoD to manage such structure, makes it difficult to achieve that goal. Nevertheless, it is possible to establish links with existing incubators and develop synergies that could allow MoD to place redundant personnel willing to establish new businesses in such facilities.

The NTF originally did not include the opportunity to establish nor to develop links with business incubators. However, pursuant to a recommendation made by an external evaluator, the NTF started to assess the opportunity to build the capacity of PRISMA to deal with business incubators. A link between PRISMA and business incubators was identified as an opportunity to build a synergy with local communities and further support NTF project beneficiaries as well as part of the capacity building and exit strategies of the NTF.

A series of meetings were held with various stakeholders (relevant ministries, municipal authorities and international agencies which are dealing with business incubators development) including a number of visits to different existing incubators to select the most effective and financially sound solutions. This assessment resulted in the following findings:

- Establishing a business incubator for both services and production is complex and requires intricate coordination with local and national institutions;
- Establishing a business incubator requires specialised, dedicated staff and approximately 400,000 EUR with a set-up timeframe of two to three years;
- Serbian Government has recently developed a Programme for Business Incubators and Clusters Development in the Republic of Serbia, 2007-2010 supporting and investing in the development of incubators. Joining existing incubators appeared as the most viable solution for the NTF program.
- Securing business premises in existing incubators in locations closest to the RRCs (one in the central Serbia, one in the north and one in the south) entails refurbishing and equipping the business space, but becomes the 'property' of MoD for numerous cycles of eventual beneficiaries;
- Programme sustainability includes training PRISMA staff on incubator management and administration related issues;
- During the assessment, contact has been made with SINTEF, a Norwegian institution working with the Serbian authorities in developing business incubators. MoD needs to build synergies with SINTEF for training.

Based on the above findings, it was decided to take advantage of the existing incubators and invest in the same by purchasing office space for MoD beneficiaries. Furthermore, the NTF financed SINTEF to organise a training course aimed at building the capacity of PRISMA to deal with business incubators. This training, built on the SINTEF expertise, targeted two PRISMA staff for a period of nice months.

## **Lessons Learned and Best Practices**

- √ External support might be required when the caseloads are very high, but the downsizing processes is part of MoD regular activities and capacity building actions have to be seen as a priority to allow MoD to learn how to conduct those activities after the end of the programme.
- √ Downsizing activities are rarely to be considered as a single event; the more a country progresses towards the setting up of a professional army, the more such processes become a regular activity of the MoD aimed at reintegrating contract soldiers at the end of their contract.
- √ Capacity building is an essential project component and is also key to ensure a proper exit strategy and avoid having the need for new external interventions in the future;
- √ Capacity building should focus on upgrading and further strengthening the skills and expertise of the MoD staff as well as consolidating the structures looking at the provision of equipment and the refurbishment of facilities. Involvement in heavy construction works should be avoided.
- √ Use the project funds/structures to establish long term synergies with tools for enhancing reintegration like business incubators.

## 5. Checklists

### 5.1 Checklist for Planning

Downsizing processes are political decisions and are always directly connected to the political climate of that specific country or region. Political issues cannot be always foreseen as risks or assumptions and sometimes need to be accepted as part of the project. In order to avoid a situation where political risks create problems in the implementation of the project, it is important to gain political backup through the signature of MoUs with the local counterparts. MoUs will not fully protect the project against political decisions, but could be used as justification towards the donors and to point out the precise responsibilities in the case of limited cooperation from MoD.

In many instances, these kinds of projects require the cooperation of a variety of public institutions other than the MoD. It is important to assess at a very early stage if there is a need for the establishment of an Inter-Ministerial Council that could help coordinate activities. However, when taking such step it has to be well considered who should be part of it and whether participants should focus on the operational or policy level.

Cooperation and agreement should be found with relevant national counterparts like the National Employment Service or the Chamber of Commerce in order to share information as well as build synergies with the assistance provided by the project. Similar agreements should be concluded with other local and international actors providing assistance in fields that are relevant for the beneficiaries such as employment and economic development.

To make sure that all project activities are in line with the local environment and avoid possible problems in the implementation phase, the legislative framework should be part of the assessment.

Laws that regulate downsizing processes are to be analysed carefully since they define “when and how” the target groups will be referred to the project. It is also important to check micro-finance laws: i.e. the legality of IOM implementing revolving funds or operating as a microfinance institution in the country. A complete assessment of the existing laws on employment, education, and pension plans is also important.

A detailed understanding of the in-country social, political and geographic contexts and a good understanding of the economic situation helps to mitigate possible reintegration hurdles and challenges.

When conducting the assessment, check for complementary activities that may be local initiatives or EU, World Bank, UN or other international livelihood and training programmes.

Although to have a target group precisely defined would help the project design, in the majority of the cases a good estimate of the beneficiary caseload is sufficient.

Office location or co-location with host government is the preferred option. However, an analysis of the benefits must be conducted; co-location requires high level of trust and transparency and, in certain instances, might also slow down the actions – bearing in mind that co-location may not always be the best option.

Staff availability and staff training should consider that local staff is always a better option as because of their understanding of the local contexts and realities. National staff allows for a faster and swifter programmatic transition / handover of the programme to local institutions. Although non-national staffs are often recruited to ensure neutrality and independence, trainings and the establishment of transparency mechanisms can be established to ensure that local staff also maintain neutrality to the extent when and where this is realistically feasible.

PI campaign design focus on punctuality, discipline, determination, etc. as well as financial contribution for the eventual employer.

At the design/assessment stage it is crucial to identify the main donor (lead nation(s) in the NTF). The lead nation(s) is the most important counterpart for both the operational and policy related activities.

There is no special procedure for selecting a lead nation(s). Usually the lead nation(s) is identified in the preliminary discussions about the project that the IOM Mission will have with the MoD and the different donors. It is essential that, beside the availability of funds, the lead nation has interest in the project and is proactive from the earliest stage in order to have a successful implementation

At the preparatory stage, it is necessary to determinate what the goals are that NATO/PfP and the MoD want to achieve in the project. The result of such analysis should be available during the preparatory phase to define the activities as well as help identify potential donors.

Relevant data and information about the labour market, economic situation, employment should be collected through official national documents as well as from surveys and reports prepared by the country's institutions and agencies.

The target group has to be clearly indicated and defined by the host nation (possibly in coordination with Donors and IOM) to avoid that counterparts (MoD) change priorities during the implementation. As part of the target group, the project proposal needs to define clearly whether civilians, soldiers, NCOs and or officers are eligible for support.

All essential elements concerning the activities and the target group shall be collected during the assessment taking into consideration the socio-economic factors as well as the labour market and the existing legislation. Severance and pension plans should also be assessed.

The project proposal needs to define the level of involvement of MoD and each other party; precise ToRs shall be written for that purpose as well as mechanisms regulating the partner's involvement. Tasks and goals have to be clearly set for each of the meetings. A meeting involving MoD IOM and donors could be set regularly for trouble shooting purposes.

## **5.2 Checklist for Direct Assistance (ICRS & RF)**

Identify potential key partners and stakeholders (training institutions, SME-support mechanisms). Where these are not available, cooperation mechanisms should be established with existing national institutions (Employment Bureaus, Chambers of Commerce Associations of Employers etc.) to facilitate the access of the beneficiaries to employment and training opportunities.

Cooperation and agreement should be found with relevant national counterparts like the National Employment Service or the Chamber of Commerce in order to share information as well as build synergies with the assistance provided by the project. Similar agreements should be concluded with other local and international actors providing assistance in fields that are relevant for the beneficiaries such as employment and economic development.

Identify the required staff functions, prepare their ToRs and establish an organisational chart. The PRISMA experience has demonstrated that the optimal staff configuration consists of: manager, psychologist and labour market officer.

Resettlement programmes work with employment agencies, and registration forms used should be compatible with those used by employment bureaus and/or agencies.

Although it is more important to define the best timing and modalities for the disbursement of the assistance rather than the amount, the maximum individual assistance and the modalities for its disbursement (grants/loans) should be defined according to the analysis of the local economic situation. When the level of assistance is too low, the activities are just income generating and not creating businesses. This analysis would also prevent criticism on the levels of assistance provided through the project. It is important to assess the level of financial assistance in relation to the local market and to consider the involvement of civilian personnel from the MoD in this decision.

Grant levels have to reflect both the real economic situation and what the donor is willing to fund. These elements vary from country to country and need to be

carefully assessed. A low grant amount will support income generation activities, not business start-ups. A too high grant might attract a very high number of beneficiaries that are not necessarily motivated.

By default, these projects have a direct impact on the socio-economic development of the host country. All supported businesses and activities should have legal status. Local (and international) counterparts should play an active role in supporting and advocating for further simplification of business registration processes as necessary. When developing a project, contacts should be established with local institutions to ensure complementarities with existing economic development activities.

Allocate time and funds for individual project monitoring as well as overall programme evaluation. Ideally there should be at least a mid-term evaluation every two years and a final evaluation. A mid-term financial audit is also recommended when the budget is particularly high.

When developing the budget, the following items should be considered:

- training costs identified in accordance to average national costs;
- budget for SME establishment in line with estimated of credible financial institutions;
- budget for employment bearing in mind the national minimal wages;
- budget for education in line with the standards set by the Ministry of Education;
- budget for staff and office space where the host nation is not able to provide such resources.

### **5.3 Checklist for Capacity Development and Exit Strategy**

Capacity building cannot be ensured only with training. It is necessary to make sure that staff are able to implement what they have learned. The modalities for the transition and transfer should also be agreed upon at early stages of the programme so as to ensure the necessary mechanisms are in place for a smooth transfer. The most appropriate tool to reach that goal is to combine regular training with coaching, secondments, learning by observing and learning by doing techniques. Study visits to other countries having similar programmes could also be organised.

From the onset of the programme design, the entity which will take over the programme once the executing agency departs should be determined. Before the end of the programme, it is necessary that structures (staff and offices) are well identified and adequately equipped and trained.

Mechanisms should be established to capture best practices, success stories, and relevant materials should be created and left as a statement of the resettlement undertaking.

## 6. Conclusions

### 6.1 General Conclusions

Defence Reforms may face resistance by the local authorities since by its very nature it addresses a structure that is linked to power: military institutions. In turn this means that a defence reform programme, which often leads to downsizing of staff and reducing of military infrastructures, directly impacts some political powers. Consequently, many international agencies, organisations and donors address Defence Reform cautiously and strategically.

Recently, and with great success, NATO - *Partnership for Peace*, through the Stability Pact and bilateral programmes, has supported resettlement programmes and demonstrated the importance of these programmes, without which long-lasting peace might not have been possible.

It is in the very interest of nations and their respective citizens to ensure the establishment of a professional army, who in turn serve their interests. Citizens should be in a position to define the role of the army so as to prevent abuse by the military, and, in countries of transition, this often means a 'changing of the guard' from the old system. Restructuring often entails the downsizing of personnel, who require immediate attention through PRISMA and ICRS-type interventions.

IOM is the leading agency in addressing reintegration needs and providing resettlement assistance to demobilised soldiers, discharged staff and resettled personnel. In this sense, IOM has a unique position and experience to further build government knowledge and capacities to deal with these development and community stabilization programmes.

After two decades of project design, implementation and building government capacity, a set of common parameters and guidelines have been developed from the quality of information essential at the assessment phase to the quantity of data during execution stages of the programme. IOM has developed standardised forms that can be used as a common starting point for all projects and then adjusted to the specific country/project conditions.

Recent programmes have further stressed the importance of clear and unambiguous laws that regulate downsizing processes that define when and how the target groups will be referred to the project for assistance. Such a decision or law should take into account former laws if a country is in transition from an old system to a new one. Additional laws to be considered include laws on micro-finance as well as laws on the receipt of foreign aid by the host country.

A final consideration is the inclusion of an inception period for every large or multi-year defence reform project. Experience in several countries has repeatedly proven

that both the MoD and IOM require several weeks before becoming operational in delivering assistance to the beneficiary.

## 6.2 Specific NTF-Related Conclusions

As illustrated in the text, it is not always necessary to have a programme like the NTF to sustain the reform process in a country. In some cases, the country is able to conduct the entire process and the support required from NATO - *PfP* can be very limited to advice or provision of specific supporting elements. However, when the downsizing process affects a large number of people and the financial needs are particularly high, the NTF mechanism becomes very useful.

In that context, it is useful to look at the elements that made the NTF necessary in Serbia, focusing on the constraints and dynamics that led to the establishment of the NATO - *Partnership for Peace* Trust Fund in support of the PRISMA programme.

Since the very beginning of the development and implementation of the PRISMA programme in 2004, the PRISMA team has gained competences and experience in working with clients, through assistance from international partners. However, there was a need for additional support to develop the existing structures, to refine the upgraded skills and a lack of means to implement the component related to financial support to employment. Considering that the latter represents the end goal of PRISMA, it was very important to implement this component in the best possible way. Therefore, the engagement of an institution with experience in similar projects was preferable. These conditions were met when the NTF was set up and IOM was engaged as executive agent.

Besides providing the means and structures for support to employment and business creation, the NTF significantly reinforced the retraining component and contributed to the capacity building of the PRISMA team. Valuable experience was gained in PRISMA and NTF by jointly working with beneficiaries.

Thanks to the NTF support, PRISMA not only has been able to activate all its components, but through cooperation with a variety of counterparts, it has been able to test its mechanisms and develop best practices and lessons learned. As a direct result of such actions, procedures and criteria have been revised and the whole system adapted to the needs of the different stakeholders. Upon completion of the NTF project, and bearing in mind the specific conditions and PRISMA's target group, the experiences gained by the IOM will be very useful for future projects.

In addition to those positive elements, one of the keys of the success of the PRISMA - NTF collaboration was that the project was a response to the needs of the Serbian MoD. All activities were jointly designed and managed to achieve those general goals that have been defined by the MoD in its defence reform strategy.

## 7. Annexes

### Annex no. 1

#### APPLICATION FORM FOR USING THE SERVICES PROVIDED THROUGH THE PRISMA PROGRAMME

- for persons whose service ended pursuant to service needs -

I hereby apply for using the services provided through the Program for Resettlement of Redundant Military Personnel „PRISMA“.

PERSONAL INFORMATION (columns marked with * are to be filled by professional soldiers only)			
SURNAME, parent's name and NAME			
Place, municipality and republic of birth			
Personal Identity Number	Rank* (held prior to termination of service)	Branch-Service* (during professional military service)	
Residing address		Phone number	
Street and number, city and postal code		home	mobile
Highest qualifications gained in MILITARY schools (circle)			
semi-qualified    qualified    highly qualified    military secondary school    military academy    military technical academy command staff college    specialist    MSc/MA    national defence college    PhD			
Highest qualifications gained in CIVILIAN schools (circle)			
low    semi-qualified    qualified    highly qualified    secondary school    college    university    specialist MSc/MA    PhD			
List the highest military school you graduated from			
List the highest civilian school you graduated from			
Date of service termination pursuant to service needs		Total insured years of service in the MoD and SAF	
List the last two service grades (civilian personnel list number of points)		date	value
	previous one		
	last one		
With limited ability during professional military service			YES - NO
Number of redeployments (according to valid decision)			
Due to redeployment, I have been separated from my family for			_____ year
STATEMENT: In line with labour market needs, I accept new employment in any part of the Republic of Serbia			YES - NO
FAMILY STATUS			
Married (circle)	YES - NO	Number of children (legitimate and illegitimate dependants)	
Single parent (circle)	YES - NO		
Number of UNDERAGE dependants			

Number of unemployed FULL AGE family members (spouse and children)		
Number of family members – with work disability who haven't attained the right to pension		
<b>HOUSING STATUS</b>		
Adequate housing, under provisions of the Rulebook	YES - NO	
I'm living in a flat that is smaller than the pertaining one by	_____m2	
I'm using hotel accommodation or accommodation in a military facility	YES - NO	
<b>Circle PRISMA Program components that you would like to use (you can circle more than one):</b>		
retraining courses, motivation courses, information on small and medium-sized enterprises, advice and assistance in job search, providing loans for own business start-up – self employment and subsidized employment.		
<b>If you are interested in attending retraining courses at the Training Centre for non-commissioned officers and civilians educated for specific military professions in Belgrade (list the modules in order of priority from 1 to 2 in the boxes below) – to be filled by NCOs and civilian personnel (secondary school education) –</b>		
Programming and management of flexible production of CNC cells lathe- CNC – milling machine – robot, Servicing of cooling systems, installing air conditioners and servicing and maintenance of air conditioners, Auto gas fixtures, control of auto gas fixtures and service and maintenance of auto air conditioners, Plastic plumbing and installation of central heating system using cooper pipes, Video surveillance installation, Security of property and persons, Bookkeeping.		
I need accommodation and meals during retraining (circle):	YES - NO	
<b>If you deem the above mentioned retraining modules unsuitable for you-please list the retraining modules that you would like to attend (please write using block letters):</b>		
1.		
2.		
<b>Do you consent to making the following information available:</b>		
1. to IOM (International Organization for Migration) as executive agent of the Trust Fund	YES	NO
2. Post your CV in electronic form on the Internet	YES	NO
<b>Apart from the advisory services offered at the Regional Resettlement Centre and retraining programs at the Training Centre, you can use the financial assistance provided through the NATO - Partnership for Peace Trust Fund, implemented through the IOM (International Organization for Migration). Circle one (to be filled by professional soldiers and civilian personnel only):</b>		
Business creation, Business expansion, Financing courses (trainings not organized within listed Training Centres) and		

I solemnly declare and affirm under penalties of perjury that the above information is true and correct:

\_\_\_\_\_  
(place and date)  
\_\_\_\_\_

CLIENT SIGNATURE

## Annex no. 2

### Roles and Responsibilities of Partnering Ministries and Agencies

The Programme defined the roles and tasks of stakeholders in the military resettlement process, i.e. responsible ministries, their executive institutions, agencies, NGOs, donors and other national and international partners.

The Ministry of Defence, primarily through the Directorates, provides:

- Timely and comprehensive database on redundant personnel, contained in Information System databases,
- Direct liaison with redundant personnel,
- Thorough information on available Programme components, as well as rights and opportunities of each individual,
- Development and delivery of information and motivation courses,
- Counselling services in career selection in preparation for new employment
- Facilitating contacts with potential employers,
- Preparation and training for business start-up,
- Preparations for, and referral to (re)training opportunities ,
- Monitoring and support to discharged personnel until their employment, or, until the expiry of a two year period from termination of employment
- Implementing an efficient information and media support system,
- Financial overview of funds' disbursement during the implementation of Programme's components

The role of Ministries of Labour, Employment and Social Policy was to:

Elaborate on military resettlement process in preparing the employment strategy and prepare necessary amendments and changes to legislation in order to ensure the implementation of the Programme components,

Provide assessments on labour market needs in terms of specific professions, in accordance with strategy for economic development, i.e. labour market survey and assessment on employment opportunities in specific industrial branches, according to professions and qualifications necessary,

Ensure that National Employment Service provides necessary data on the labour market situation and participate in the work of the RRCs with the aim of sharing experiences in the work with clients.

The role of the Ministries of Education and Sports was to ensure validation of qualifications; scientific and professional titles acquired at military schools and military scientific research institutions, as well verification of certificates on professional training in training centres. So far, the Faculty of Organizational Sciences in Belgrade and the Faculty of Mechanical Engineering in Nis were engaged as partners in conducting retraining courses. They have regulated this issue with the above-mentioned ministry.

The Ministries of Finances were to provide timely inflow of funds necessary for the implementation of the Programme components, while the Ministries of Economy and Privatization, along with the Ministry for Capital Investments, were to provide funding for the establishment of business parks, business incubators and business start-ups in vacant military facilities.

The role of the Ministry of Foreign Economic Relations was to encourage foreign investments in projects aimed at employing redundant military personnel and to undertake measures to ensure foreign donations for the implementation of the Programme and its components through bilateral cooperation, with the active involvement of the Customs Department.

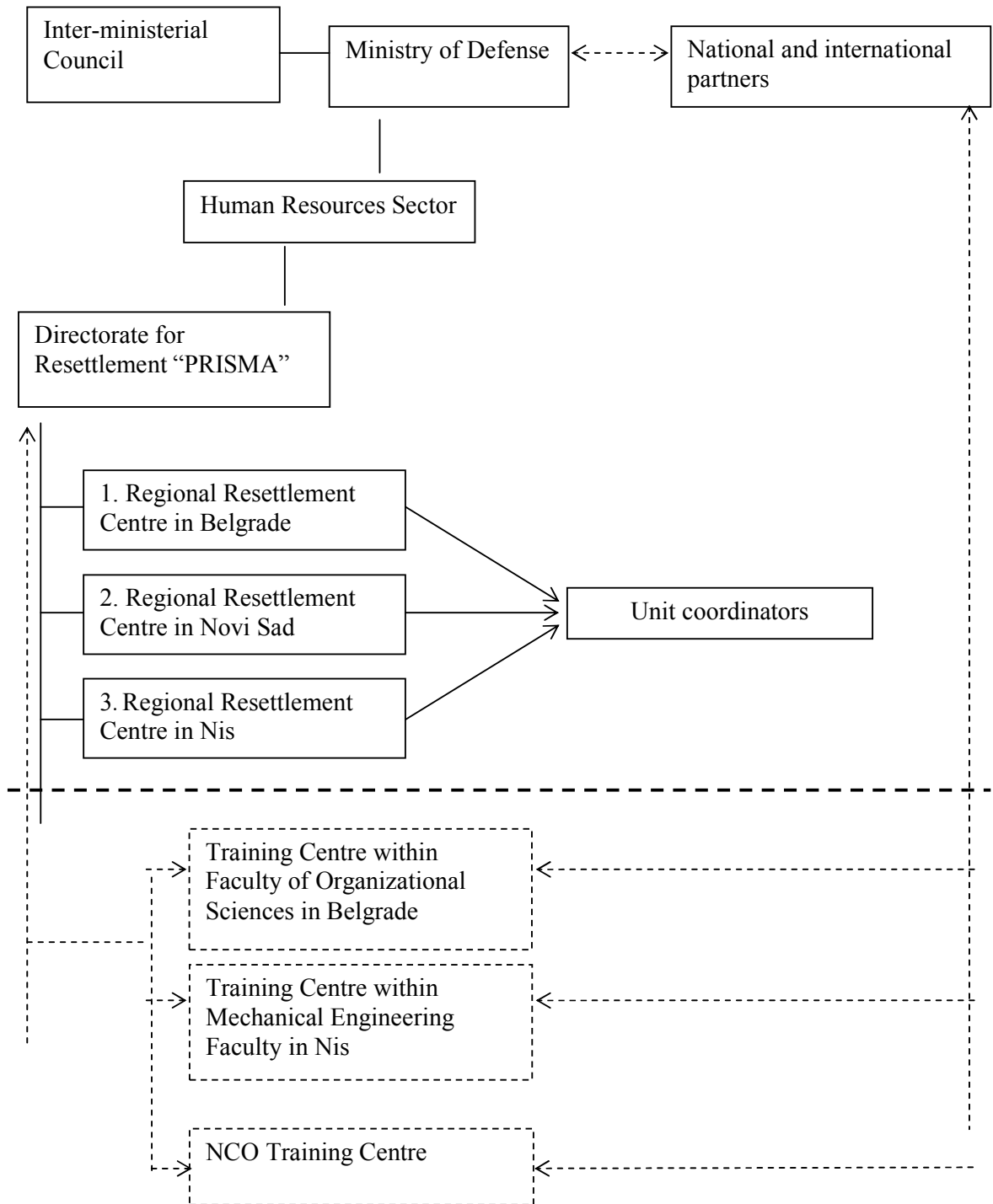
Chambers of Commerce and the employers' associations contribute by undertaking measures within their competences, supporting activities aimed at employment of redundant military personnel directly, and through regional offices. The Belgrade Chamber of Commerce currently provides retraining courses for NCOs and civilian employees and participates in joint efforts to employ the trainees after completion of courses.

Since its beginnings, the Programme has been open for cooperation with NGOs that can be involved in the project preparation, direct implementation of its components and quality monitoring and evaluation.

International partners are involved in the Programme through bilateral cooperation or Trust Funds, providing financial and advisory assistance and expertise. In this regard, they actively participate in organizing seminars, courses and other forms of preparation and direct implementation of Programme components.

# Annex no. 3

## Organization model – structure of resettlement institutions



# Annex no. 4

## Topics addressed during motivation workshops

### 1. Introduction to retraining and resettlement

- Our experiences
- Retraining process
- Comfort zones and testing our limits
- Setting professional goals and career selection
- Transferable skills

### 2. Drafting questionnaires:

- Identifying behavioural patterns
- Identifying job competences

### 3. Writing a CV

- Visual impression
- Contents and formulation
- Composition
- Filling application forms

### 4. Self-marketing strategy

- Job search methodology
- Creating a network system of personal contacts
- Contacting employers directly
- Informational interviews

### 5. Various methods on how to find a job

### 6. Job interviews

- Preparing for an interview
- Types of job interviews
- Body language
- Active listening
- Preparing answers to questions that might be asked during an interview
- Preparing questions to ask the employer
- Preparing an interview plan
- Telephone interviews

### 7. Tests

- Psychometric tests
- Competences test
- Personality questionnaires

### 8. Evaluation of the motivation workshop (candidates fill out an evaluation questionnaire)

## Annex no. 5

### List of Vocational Training Courses Offered to Redundant MoD Personnel

In addition to a direct assistance to discharged defence personnel, through the counselling and financial support, one of the aims of the NATO Trust Fund Project is to further enhance the MoD capacity to conduct similar activities once the NTF project ends.

Within that framework, the IOM and MoD staff has been working

#### BELGRADE RRC

23-24 Apr 2007	Basic training on finance and loans	ABF
14-15 May 2007	Business plan assessment and development	IOM
9-10 Oct 2007	Communication skills and team skills	ABF
4-6 Feb 2008	Advanced communication and negotiation skills	ABF
12-13 Jun 2008	Team building	ABF

#### NIS RRC

3-4 May 2007	Basic training on finance and loans	ABF
7-8 May 2007	Business plan assessment and development	IOM
11-12 Oct 2007	Communication skills and team skills	ABF
25-27 Feb 2008	Advanced communication and negotiation skills	ABF
18-19 Jun 2008	Team building	ABF

together in all components of the project implementation using a mix of coaching and learning by doing approach. Additionally, as a part of regular capacity building activities, IOM-NTF has also organised specific training activities aiming at increasing the skills of the PRISMA staff on specific issues

related to the assistance to the reintegration of civilian life of discharged defence personnel.

As experience shows, these training activities also contribute to a more general team building exercise, fostering the cooperation between IOM and MoD staff for the benefit of the project beneficiaries.

#### NOVI SAD RRC

26-27 Apr 2007	Basic training on finance and loans	ABF
10-11 May 2007	Business plan assessment and development	IOM
16-17 Oct 2007	Communication skills and team skills	ABF
11-13 Feb 2008	Advanced communication and negotiation skills	ABF
16-17 Jun 2008	Team building	ABF