

Talking interoperability

A dialogue series for advancing interoperability in the social protection sector

Implementation of cross-border Portability - Leveraging digitalization

October 15, 2026 | 12:00-14:00 GMT



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About the Digital Convergence Initiative

The **Digital Convergence Initiative (DCI)** is a joint effort by USP2030 to support the **digital transformation of social protection systems**.

Launched in 2021, the DCI:

- ✓ **Facilitates knowledge sharing** on digital social protection systems at a global level
- ✓ **Builds consensus on technical standards** to enable data exchange between digital systems
- ✓ **Supports and strengthens countries' capacities** in their digital transformation journeys
- ✓ **Provides capacity development and training** to strengthen institutional and human capacity

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Housekeeping rules

- Ask your questions in the Q&A box
- Share any comments or resources in the chat
- Simultaneous interpretation is available
Select the language in the interpretation icon on control bar
(English, French, Spanish, Portuguese available)
- Session will be recorded



To: Everyone ▼



Your text can be seen by panelists and other attendees



Agenda

2.00-2.10	Welcome and opening
2.10-2.30	From principles to portable rights: Implementation and approaches
2.30-2.35	Questions
2.35-2:55	From agreement to digital delivery: the EESSI experience
2.55-3.15	Spain: Making the common system work nationally
3.15-3.20	Questions
3.20-3.40	What can countries today leapfrog?
3.40-3.55	Q&A
3.55-4.00	Closing: key takeaways

Talking Interoperability #24

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Presenter

Raul Ruggia-Frick

Director of the Social
Security Development
Branch at ISSA



Presenter

Pekka Repo

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European Commission
(DG EMPL)



Presenter

**Dr. Francisco Delgado
Azuara**

ex IT management unit in
the Spanish National
Institute for Social Security



Moderator

Veronika Wodsak,

Social Protection Policy
Specialist at ILO



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EXCELLENCE IN SOCIAL SECURITY

Implementation of portability - Leveraging digitalization

Raul Ruggia Frick, Director
Social Security Developement Branch
International Social Security Association - ISSA

15 October 2026 |



What is Social Security Portability?

- Social security portability refers to the ability of a person to maintain or receive social security rights and benefits when moving across borders.

It becomes particularly important when workers and their families:

- Work or reside in more than one country during their working life;
- Accumulate insurance periods in different social security systems;
- Retire or become beneficiaries while living abroad;
- Move temporarily or permanently between countries.

How can portability be achieved?

Countries can facilitate social security portability through different legal approaches.

1 Unilateral measures

A country adopts measures in its own legislation or administrative practice to facilitate portability, without requiring a reciprocal agreement with another country.

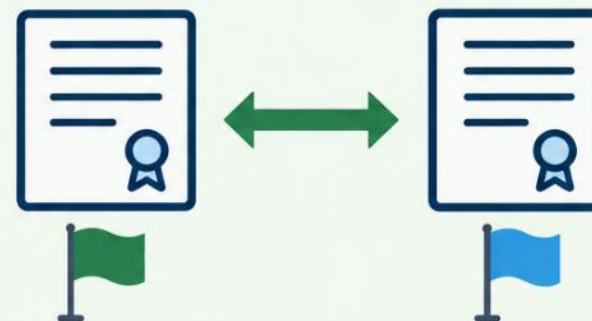


Examples

- Payment of certain benefits to beneficiaries residing abroad
- Recognition of periods completed abroad under domestic legislation
- Acceptance of digital proof of life from abroad
- Electronic submission of claims or documents from abroad

2 Multilateral measures

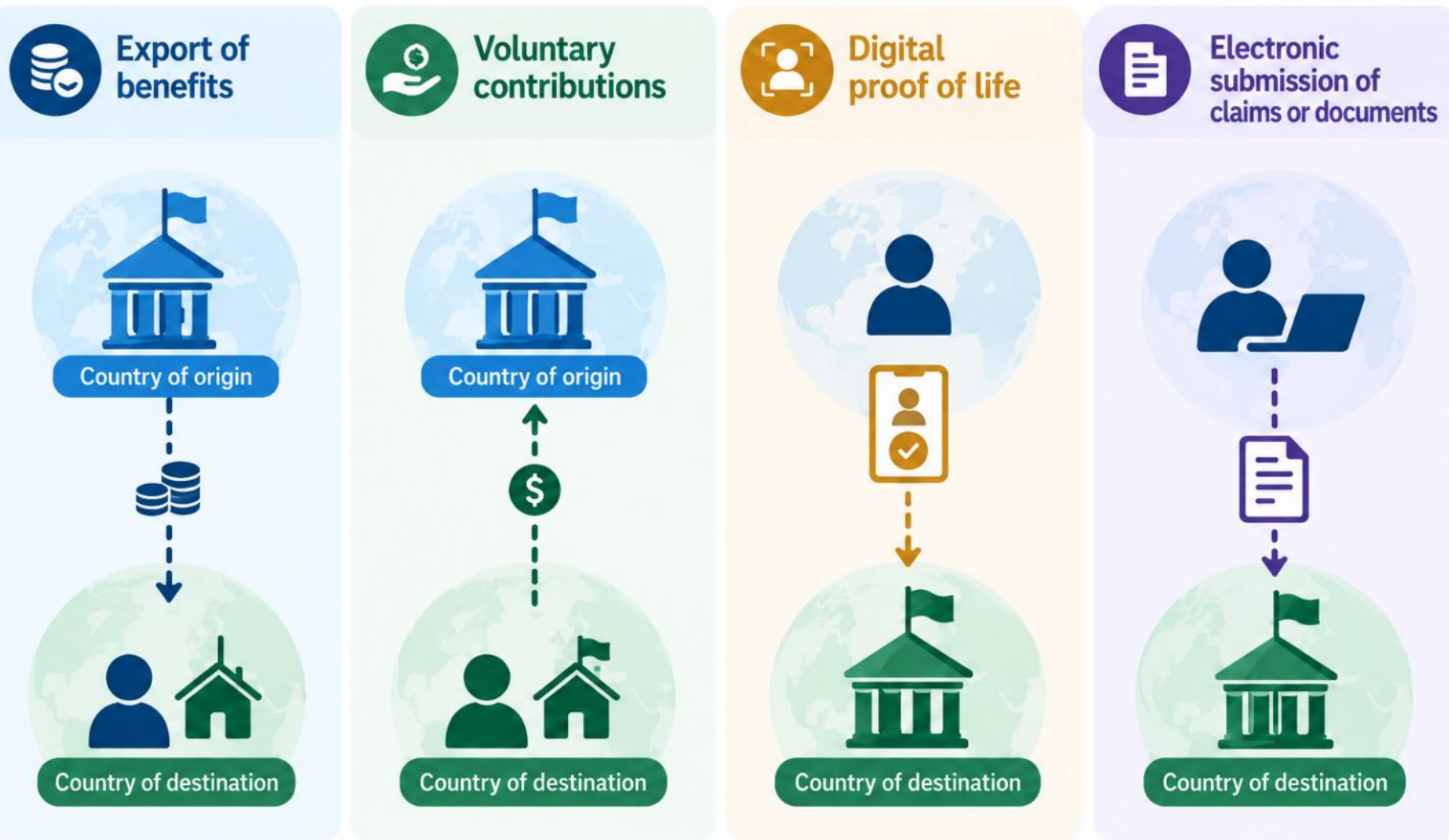
Two or more countries coordinate their social security systems through a legally binding multilateral agreement, establishing common rules for portability.



Examples

- Aggregation of insurance periods to establish entitlement
- Export of cash benefits between countries
- Equal treatment of foreign nationals
- Protection of acquired rights when moving between countries

Examples of unilateral measures to facilitate portability



Multilateral measures to achieve portability

Countries can facilitate social security portability through multilateral agreements or regional frameworks.

Multilateral regional agreements



**Ibero-American Convention
on Social Security
(CISS)**

Regional frameworks



EU Regulations

Regulation (EC) No. 883/2004
and Regulation (EC) No. 987/2009



GCC Unified Law

Unified Law of Social
Insurance (GCC)



Bilateral social security agreements



Concluded between two countries

Based on a treaty or other legally binding instrument.



Benefits and conditions might vary depending on the agreement

Therefore, workers can have different rights depending on the agreement that applies.



Easier to conclude

Generally more rapid and more tailored to the specific needs and legal systems of the two countries.



Simpler coordination

With only two parties involved, coordination and implementation may be easier in practice.



Need to negotiate one agreement per country

A separate agreement is required with each partner country, which can be time-consuming if a country has many partners.



Flexibility

Allows specific provisions to reflect bilateral migration needs and legal systems of the two countries.



Multilateral social security agreements



Concluded between three or more countries

Often on a regional basis, through a multilateral convention or a regional legal instrument.



Provide a uniform set of rules

Establish common principles and coordinated provisions for all migrants who have worked in the signatory countries.



Ensure coherence

Aligned with the objectives of economic integration, trade agreements and free movement arrangements, facilitating labour mobility.



Can be more complex and time-consuming to negotiate

Involves multiple countries and diverse legal and institutional systems, but may have stronger political leverage to include more countries.



Can reduce administrative burden

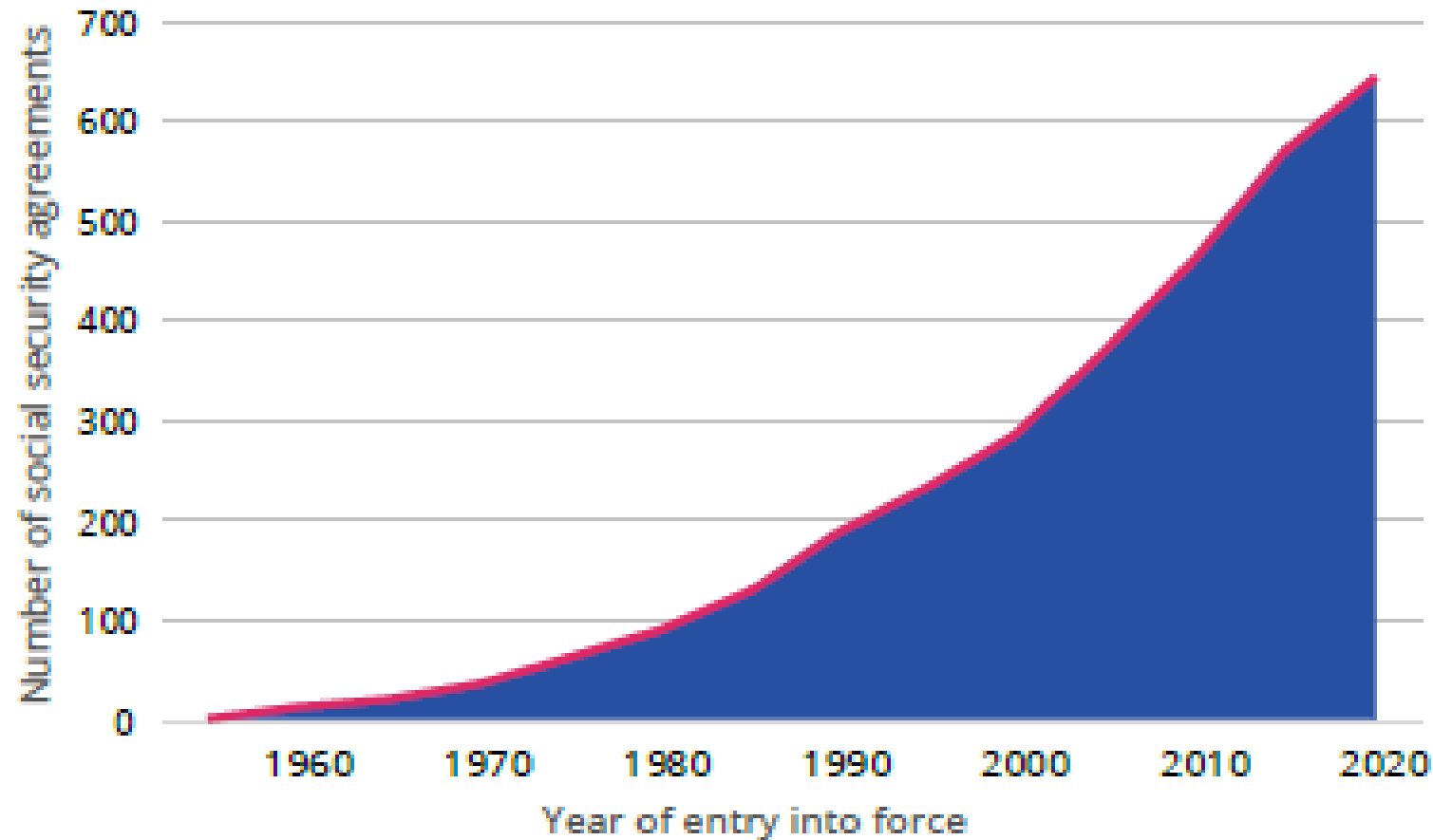
Through harmonised rules, standardised procedures and cooperation mechanisms, reducing the administrative burden of implementation.



Greater coverage and efficiency

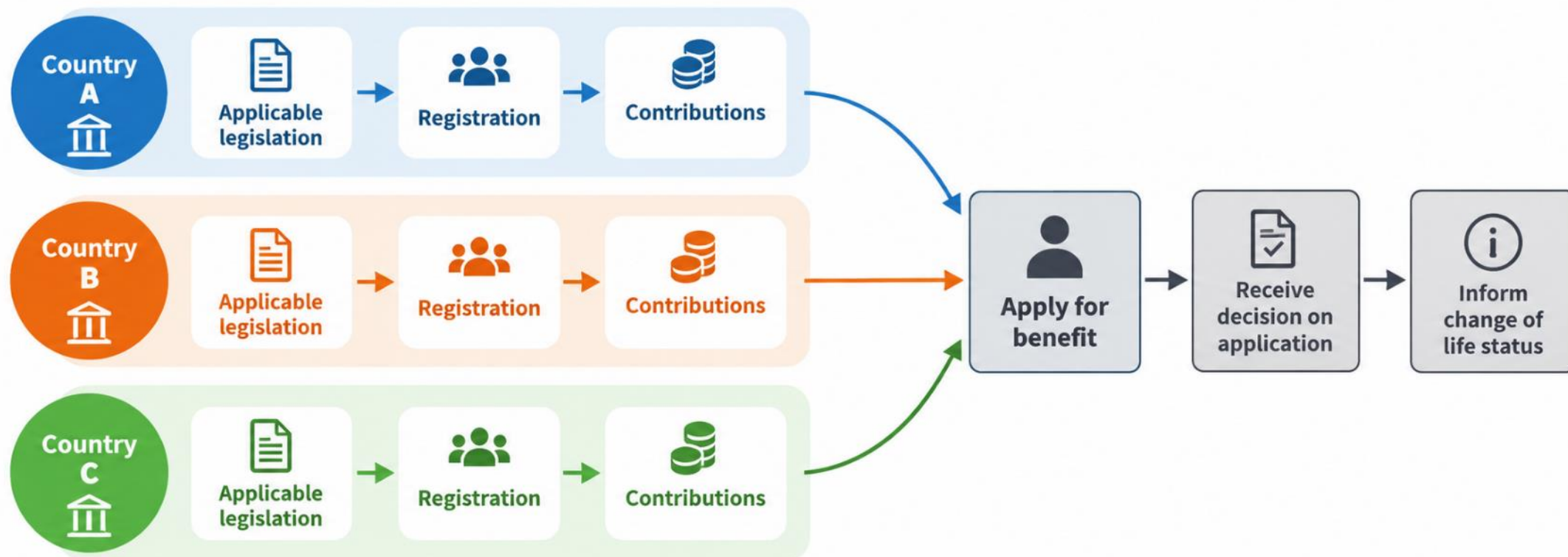
Once in place, can provide broader coverage, legal certainty for migrants and more efficient administration across multiple countries.

660 + Social Security Agreements Globally.

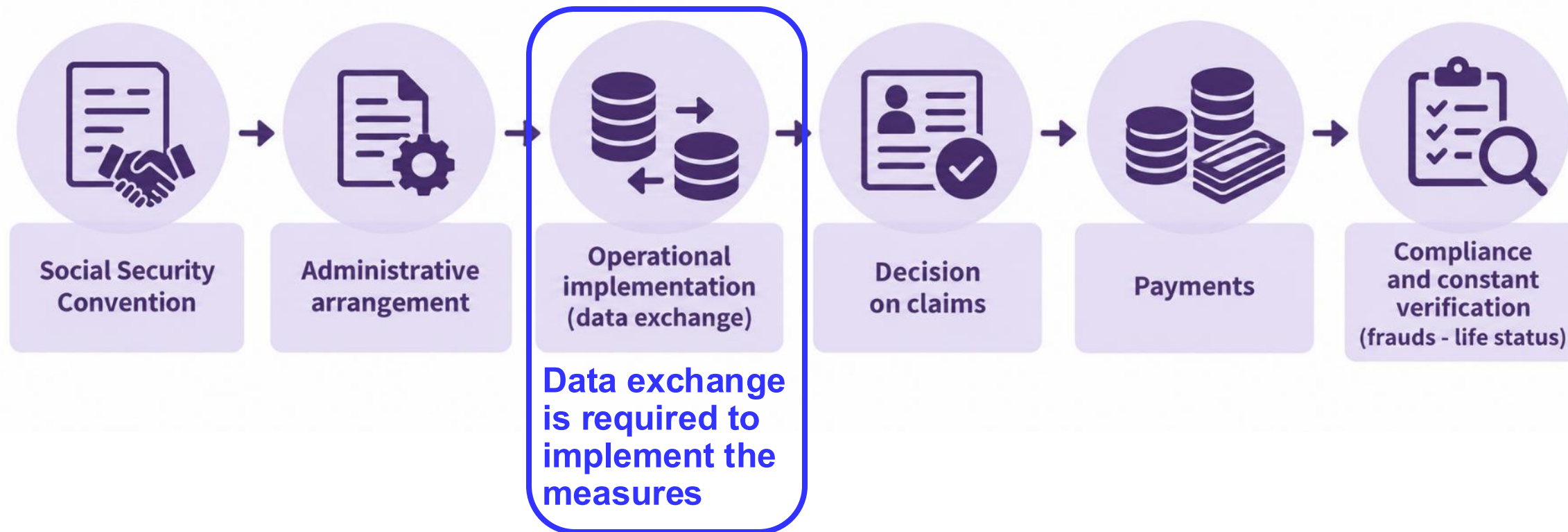


- **Latest multilateral agreement:**
 - CPLP multilateral agreement from 2015 that entered into force in 2026,
 - Ratified by Portugal, Timor-Leste and Cabo Verde.
 - Pending (Angola, Brazil, Guinea-Bissau, Mozambique y São Tomé and Príncipe)

From the perspective of the worker



From the perspective of the institutions

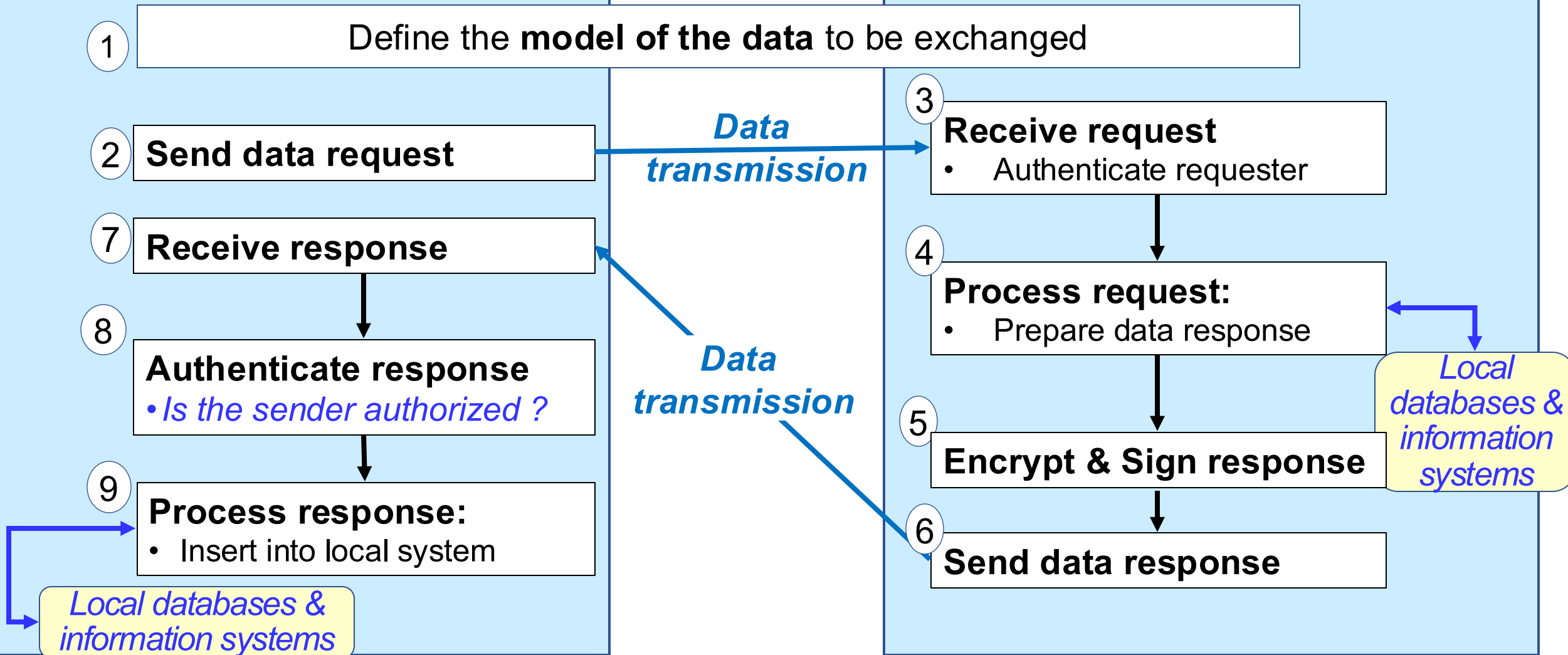


Coordination is effective only when the legal rule can be translated into an operational process between institutions.

International Data Exchange

Institution/country 1

Institution/country 2



Main implementation aspects

Information model <i>What data will be exchanged</i>	• Conceptual data fields & data types (e.g. name, birth date, ID, etc.). • Valid values, quality & validation rules, person identification criteria. • Operational data exchange models (data packages)
Architectures	• Interconnection model between institutions to exchange data. • In a multilateral scenario, the architecture involves defining if the data exchange requires a central entity.
Interoperability	• Technical Interoperability: technologies for systems interconnection. • Semantic Interoperability: matching of concepts and persons' IDs.
Data Protection, Security & Authentication	• Secured data exchange that enforces data protection regulations and guarantees the authenticity and legality of the data exchanged. • Technologies: Data encryption, signature, authentication, authorisation.
Processes & connection with local systems	• Data exchange processes for request-response. • Connect with local databases and administrative procedures.

Main implementation aspects

Governance & Management Framework	• Governance structure and roles (committees, decision making). • Strategy and implementation plan. • Enforce reliability: E.g. authentication and traceability of operations.
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Overview of the involved data

Kinds of data.

■ International agreements' “forms”:

- Personal data.
- Worked periods.
- Grant pension based on totalization of worked periods.
- Declaration of detached workers.
- Provide benefits, such as health / medical services.

■ For payment continuity:

- Life-status validation.
- Income and residence information.

Canada Revenue Agency / Agence des revenus du Canada

Protected B (revised - corrigé)

Certificate of Coverage Under the Canada Pension Plan Pursuant to Article VI of the Agreement Between the Government of Canada and the Government of Jamaica with Respect to Social Security

☐ Employed person ☐ Self-employed person

Name of worker	Canadian social insurance number
Address	Date of birth (YYYYMMDD)
	Citizenship
Name of employer in Canada	Date of hire (YYYYMMDD)
	Business number in Canada
Address of employer in Canada	R.P.
Name and address of the business where the worker will be working in the foreign country	
Initial detachment Expected period of initial detachment: Date - From (YYYYMMDD) Date - To (YYYYMMDD)	Extension - Exception Expected period of extended detachment (for extension also indicate date of initial detachment): Date - From (YYYYMMDD) Date - To (YYYYMMDD)
I hereby certify that, to the best of my knowledge, the information contained in this request is accurate and complete.	
Signature of authorized officer Telephone number	Signature of authorized officer Date (YYYYMMDD)

CRS/CRS (95) (Certificate and signature on foreign)

Canada

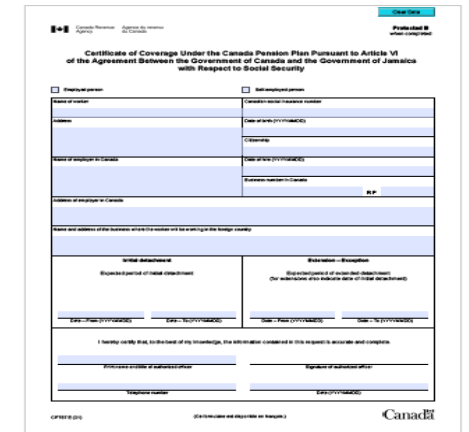
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How data is exchanged:

- **Individual-based, following the “forms” defined in the agreement:**



- **Batch of records corresponding to many individuals.**

Interoperability in social security data exchange

■ Interoperability dimensions:

■ Legal/political:

- Agreements & legal measures signed.

■ Organisational:

- Business process coordination related to institutions' decision-making:
 - To grant or stop a benefit.

■ Semantic:

- Ensuring that the exchanged data is interpreted in the same way by all the parties.
- Metadata/Dictionary with the main concepts.

■ Technical:

- Enabling systems' interconnection.
- Technologies: Web Services, REST, XML, secure shared folders.

■ Architecture:

■ Institution-to-institution interaction

- Called ***point-to-point***.
- It's the basic type of interaction to implement.

■ With a central entity processing operations:

- For example: routing & validating requests, performing calculations, etc.
- More complex. To be implemented if needed.

■ Types of data exchange.

■ Individual-based or case-based.

- The file/package exchanged includes information about one individual, for instance, the working periods.

■ Batch of records:

- The file/package exchanged includes many records, typically corresponding to different individuals.

Implementation experience: MERCOSUR



- **Multilateral agreement covering:**
 - Pensions Old-age, disability, survivors.
 - Detached workers with health/medical benefits.
- **Electronic data exchange started in mid-2008.**
 - Software development project: 2005-2008.

Information model	• Personal Data, Periods worked. • Declaration of detached workers • Persons' IDs: using national IDs
Architecture, & Interop	• Distributed architecture, no central entity/site. • Interconnection institution-to-institution (point-to-point) • Technical interoperability (Web Services, XML).
Security & Authentication	• Secured & authenticated data exchange. • Electronic signatures & Digital certificates • Traceability of operations.
Processes & systems	• Individual-based data exchange, following the “forms”. • Simple and “non-invasive” software. • Performs data exchange without validations

Ibero-American Multilateral Social Security Agreement (CMISS)

Implementation status

As of October 2026



In force / Being applied (13)

Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, El Salvador, Spain, Paraguay, Perú, Portugal, Dominican Republic, Uruguay.



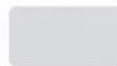
Signed / Acceded, not yet operational (3)

Costa Rica, Honduras, Venezuela.



Not yet signed: potential accession (5)

Cuba, Guatemala, Mexico, Nicaragua, Panama.



Other countries in the Ibero-American region (Not included in the above categories)

Source: OISS, status of the CMISS. ISSA colour palette. Situation as of October 2026.

Note: "Potential accession" identifies Ibero-American countries that have not yet signed the agreement; this is not an official position of the OISS. Andorra is not included in this map.

Experience of the Iberoamerican Agreement

- Signed by the first countries in Nov 2007.
- Entered into force after 7 ratifications in May 2011
- 2011-2017: development of the data exchange system: SIBERO
 - Production in 2018.
- Abandonment of SIBERO in October 2023
- New system: IBEREX, expected by the end of 2026.
 - Point-to-point interconnection.

CMISS · DIGITAL EXCHANGE

How SIBERO Worked

The original electronic information exchange system



1. Form creation and management

Users created and completed CMISS forms, initially including the SIBERO 1 form, and could attach supporting documents.



2. Authentication and security

Access required a username and password. OISS-issued digital certificates were used to digitally sign and encrypt transmissions, protecting confidentiality, sender identity and message integrity.



3. Electronic transmission

Forms and attachments were transmitted over the Internet between participating institutions, reducing reliance on physical mail and paper-based exchanges.



4. Monitoring and statistics

The system included a management application for users and a centralised module for system monitoring and statistical reporting.

Experiences of bilateral exchanges

- **Supporting bilateral agreements:**

- Australia (DHS), USA (SSA) have their specific ICT systems.
- Korea (NPS) exchanges death data with Australia and USA.

- **Life-status validation:**

- Germany (DRV-Bund) exchanges data with: Australia, Belgium, Bulgaria, Denmark, Finland, France, Great Britain, Israel, Italy, Croatia, Luxembourg, Netherlands, Austria, Poland, Sweden, Switzerland, Spain, USA.
- Spain (INSS) exchanges data with Germany, Switzerland, Australia. Shortly with Poland, Sweden, Netherlands.



What needs to be done - Key factors

- **Architecture adapted to the data exchange needs.**
 - Point-to-point: always needed.
 - Central processing: if required.
- **Applying interoperability techniques:**
 - Enable the main types of exchanges.
 - Considering data protection & security aspects.
- **Establishing standards:**
 - On technologies and data models.
 - Economies of scale.
- **Institutions' capacity:**
 - Managing international agreements.
 - Technological capacity (interoperability, security, etc..)
 - Information systems with the data to be exchanged.
- ***Human* coordination:**
 - Establishing a permanent contact group
- **Gradual implementation !**
 - Starting with the simplest data exchange mechanisms.
 - Modular software solution.
 - Mid & long-term project.

ISSA developments

■ Guides & studies:

- ISSA Guidelines:
 - Digitalisation of data exchange.
 - Overall implementation (ongoing).
- Implementing life-status validation.
- International social security agreements: studies and database.
- On-going report on international payment of benefits

■ Jointly with ILO:

- Guide for the protection of migrant workers.
- Training on development of international social security agreements.

■ Tools:

- Standard for life-status validation data exchange, based on a generic model (using *SDMX*)
- Secured folders for data transmission (using *Next Cloud*).
- Support tools for encrypting, signing, and validating exchanged files.

■ Working group.

- Involving 26/27 countries/institutions.
- Chaired by ANSES (Argentina)

Current challenges

- **Implementation of specific data exchange systems from scratch:**
 - Multiplicity of data exchange requirements leads to increased operational costs: implementation, operation and maintenance.
 - Much similarities between data exchange systems, but differences between agreements and operational models.
- **Managing security and authentication at an international level.**
 - Ensuring Data Protection and Data Privacy.
- **Managing Persons' identification at an international level.**
 - Dealing with the complexity of very diverse country approaches.
- **Reliability of international data exchange operations:**
 - Ensuring validity and non-repudiation of operations.

Conclusions

- **The increasing international coordination needs an efficient electronic data exchange:**
 - Increasing mobility of workers and cross-border payments.
 - Preventing undue payments & fraud.
- **International data exchange is still limited:**
 - Involves business and technical decisions in an international context.
- **Medium- and long-term projects.**
 - Requires a strategy
 - Incremental implementation.
- **Need to establish international standards.**
- **International collaboration involving international organisations is crucial.**



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Thank you very much!



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Questions



From agreement to digital delivery

The EESSI experience

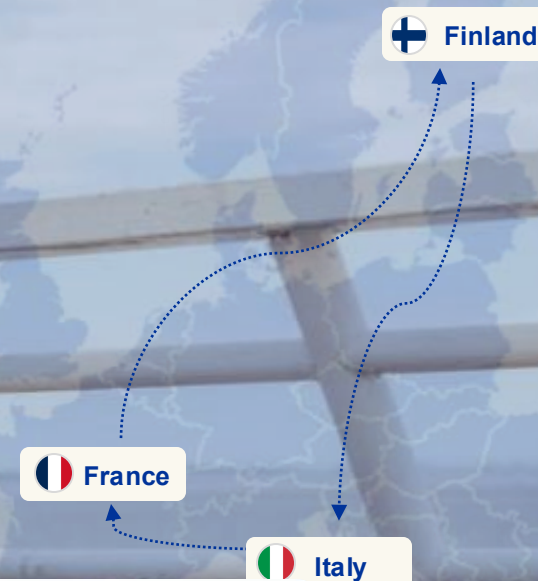
Pekka Repo

a business consultant to the European
Commission, DG EMPL



One person, several countries

A journey across different countries



Exchanges can cover:



Sickness,
maternity and
equivalent paternity
benefits



Family
benefits



Invalidity
benefits



Old-age
pensions



Survivors'
benefits



Unemployment
benefits

One life across borders. Rights assessed under shared coordination rules.



Legal rights need an operational route



What applies?
Which country is responsible?



Who does what?
Which institution acts?



**How is information
exchanged?**

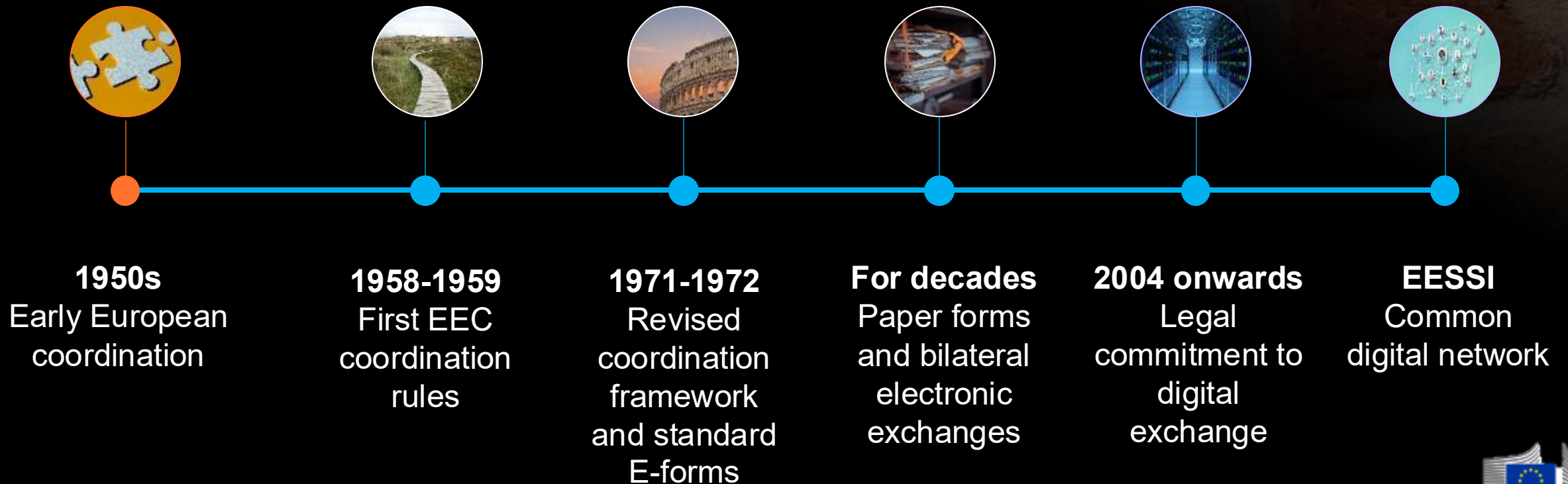


**How is the right delivered
in practice?**

EESSI: Electronic Exchange of Social Security Information



Decades of cooperation before **EESSI**



From legal commitment to a first setback



The first attempt did not deliver the operational system needed.



Why the **first delivery attempt** did not succeed

Lessons from the early implementation experience



Project management and governance

- Insufficient project management and steering
- Lack of resources
- Unclear responsibilities and decision making



Architecture and requirements

- No proper requirements specified leading to wrong architectural and technical choices
- Requirements and procedures needed revalidation



Quality and validation

- Testing revealed technical defects
- Testing exposed gaps against business reality



Contracting development does not replace business ownership, understanding and stakeholder involvement

Interoperability is more than connectivity



Who

Identities and roles are clear



What

Information is understood the same way



How

Agreed processes and technical exchange

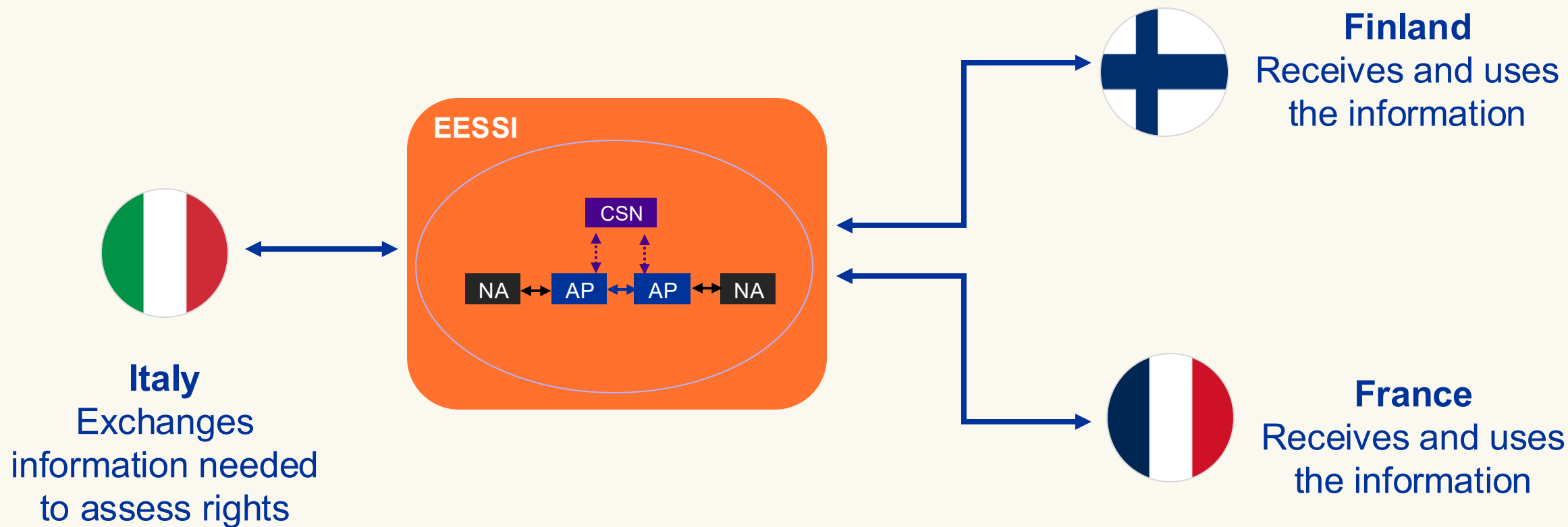


Trust

Security, data protection and accountability

A cross-border social security case through EESSI

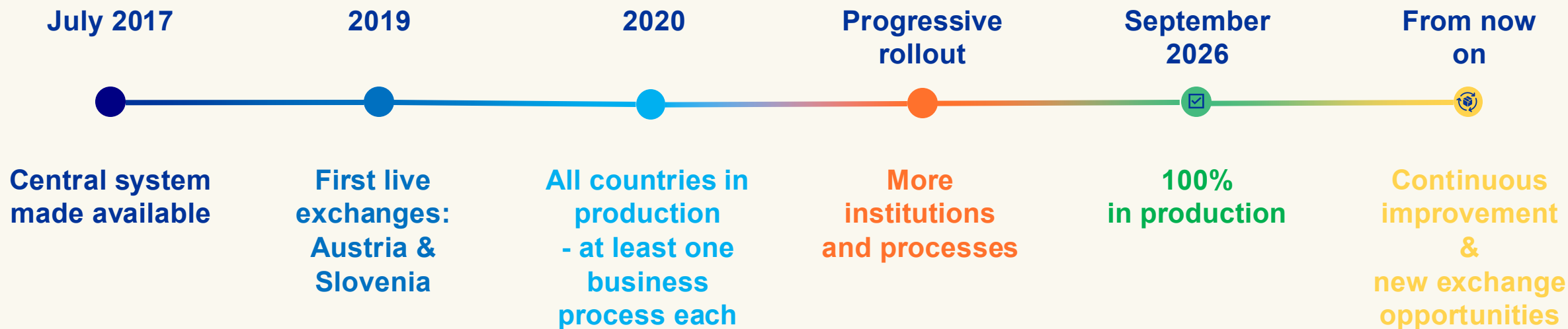
Information exchange between countries



Institutions assess rights. EESSI supports the exchange.



From system delivery to a working network



Challenges during rollout



Shared decisions

- ✓ Agreeing common procedures
- ✓ Aligning with national procedures



Uneven readiness

- ✓ Different national starting points
- ✓ Different national systems and data availability
- ✓ Integration, data quality and resources



People and change

- ✓ Adapting established paper routines
- ✓ Clarifying roles, training staff and changing daily work

The long-standing cooperation helped and constrained us



What helped?

- ✓ Shared rules
- ✓ Established organisations
- ✓ Common understanding of rights



What constrained us?

- ✓ Inherited paper-era processes
- ✓ Familiar paper-era habits
- ✓ Different national practices
- ✓ Change within national systems

What EESSI taught us



Business first

Start with **business needs** and validate requirements against **real national processes** – **technology comes later.**



Realistic rollout

Build **step-by-step**, test incrementally, start with **quick wins**, pilot and **plan** national readiness



Interoperability matters

Same information and processes – **same understanding**



Fund the whole network

Sustainable long-term support

Thank you

From agreement to digital delivery

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Making the common system work nationally

Francisco Delgado Azuara, PhD



Leitmotiv :
It's not easy, but it's worth it



Hugo Almeida's working life

PT **Portugal** — FC Porto, União Leiria, etc.

DE **Germany** — Werder Bremen, Hannover 96

IT **Italy** — Cesena

CZ **Czech Republic** — Anzhi

GR **Greece**

HR **Croatia**

TR **Turkey**

Starting point (80's and 90's):

- Long processing times
- Manual processing of paper forms
- Sending by regular mail

First measure: preventive treatment

- Exchange of E-500 forms





Around the turn of the century

Technical advances:

- From magnetic tapes to the Internet, via X.25
- New fields in database

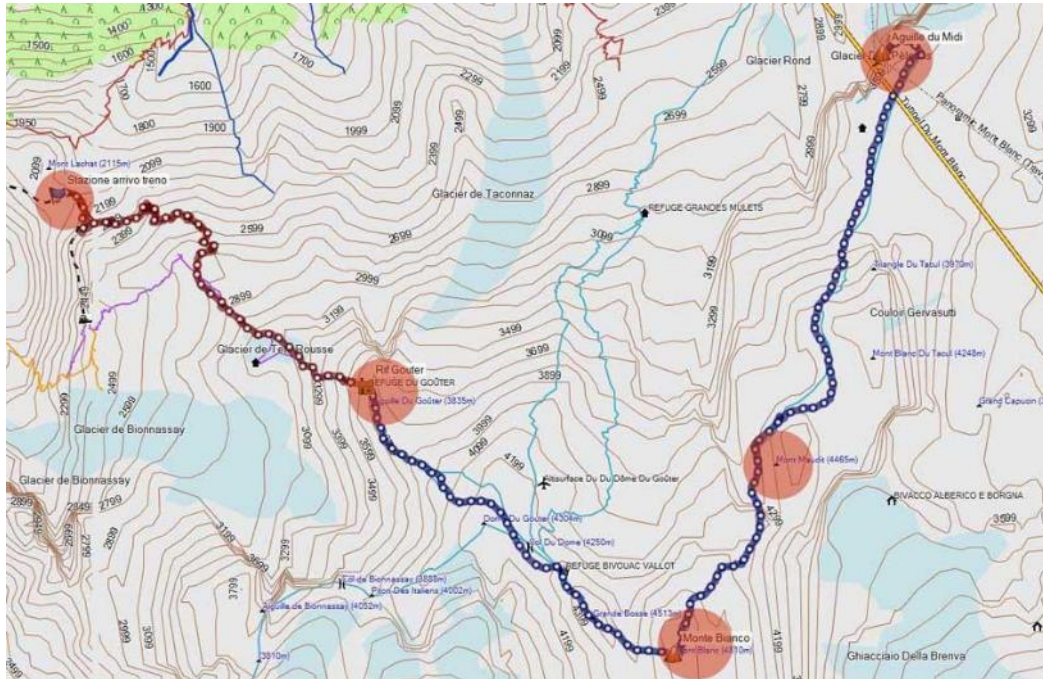
Organizational consequences:

- New procedures
- Who is competent?

Next steps:

- TESS Project (Builds 1 to 7)
- EHIC (CDL)
- New regulations
- EESSI





EESSI key points:

- Mandatory electronic Exchange
- Access Point (AP)
- SED's
- BUC's
- Institutional repository (IR)
- RINA

Challenges and issues:

- National Governance
- BUC's and SED's:
allocation of competences
- How many AP
- Network access
- IR population
- RINA, RINA handover ... and NINA



Challenges and issues:

- Interoperability
 - Organizational
 - Technical
 - Semantic
- Standardization





Current situation:

- 100% SED exchanged
- 100% BUC's
- Software evolution

Next challenges:

- Life certificates
- Cloud
- Movil
- International database
- ... all over the world

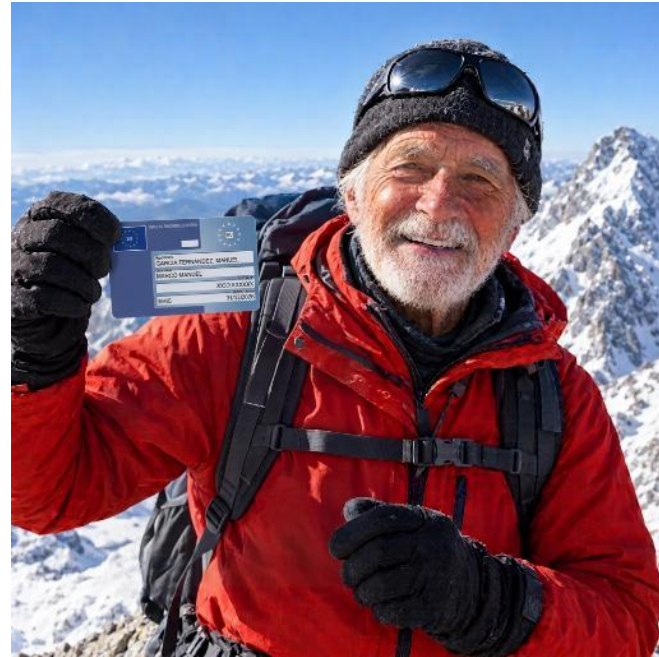
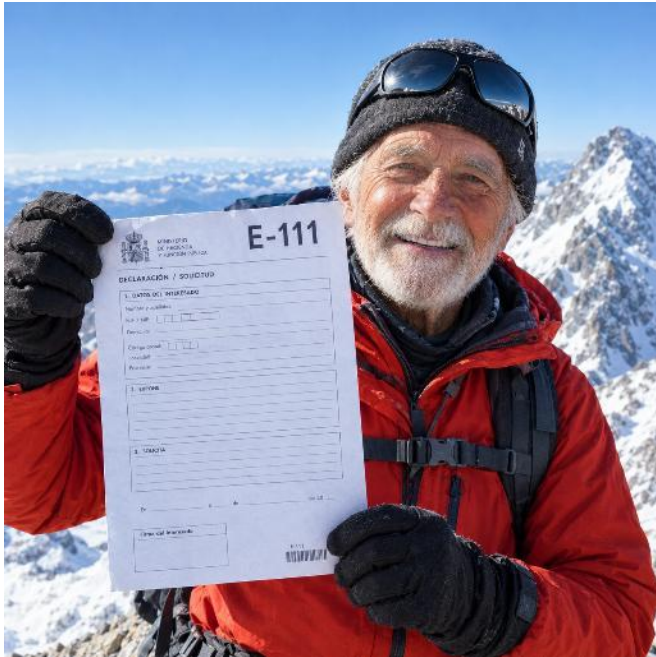
**“Now, here, you see,
it takes all the running you can do,
to keep in the same place.
If you want to get somewhere else,
you must run at least twice as fast as that!”**





Don Forest took up climbing at an age when many are thinking about retirement. Despite this, he was the first person to climb all the 11 000-foot peaks in the Canadian Rockies. Don loved the freedom of a sport that had no rules other than those imposed by his own limitations. He died at 83 while skiing with family, looking out over the mountains he considered “old friends.”

Digital Delivery It's not easy, but it's worth it.





Thanks!!!
And thanks IT

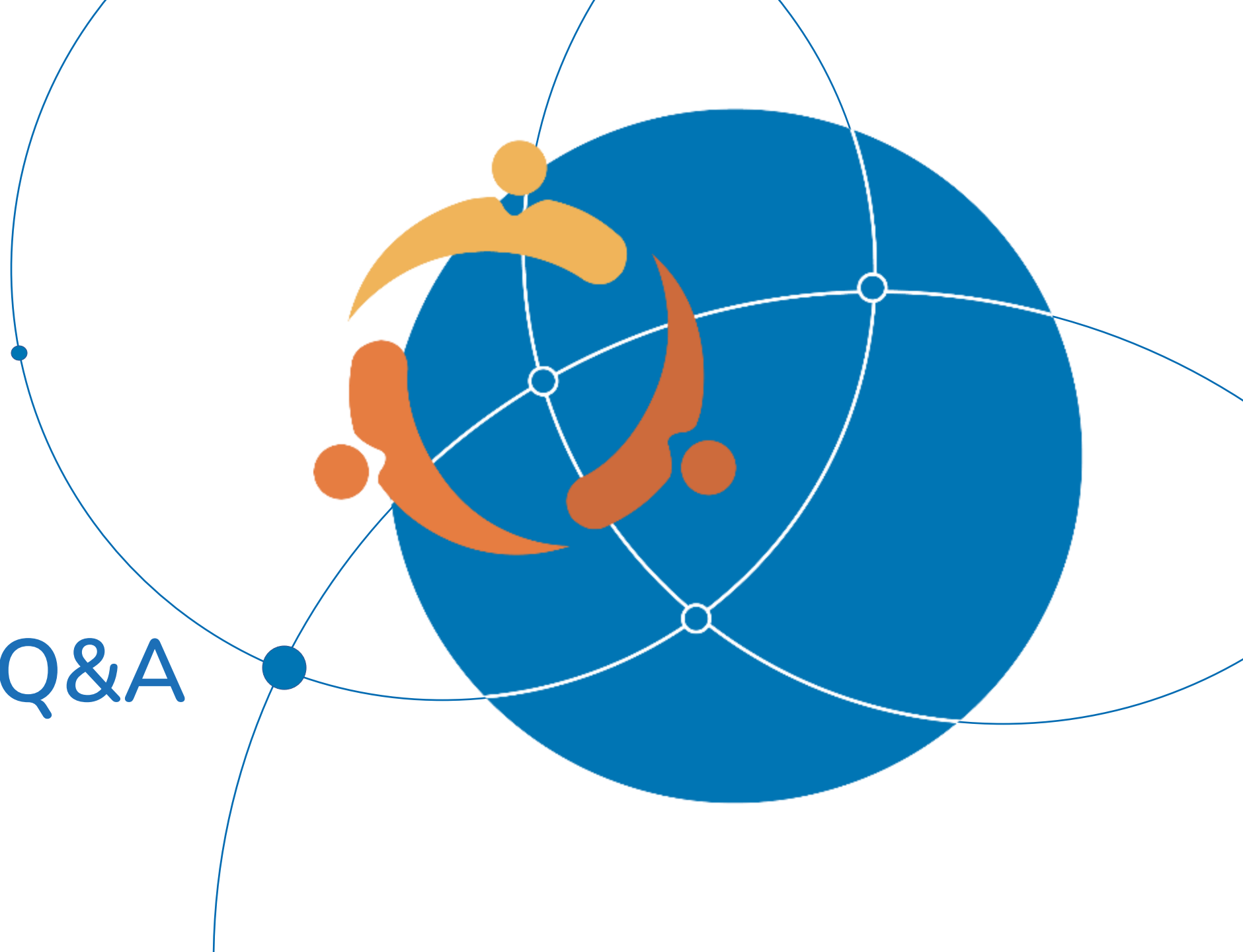
Questions



Starting the
journey today:
What is already
available to use?



Q&A



Standards in Action Challenge

Call for submissions

 Have a real interoperability example to share?



Track A
Cost of Non-Adoption



Track B
Interoperability Success Story



Track C
DCI Standards Implementation



Why submit?

Top 3 cases awarded

Global Visibility and peer-learning

Scann for more information:



Submission deadline:
13 November 2026



Q&A office hours:

10 September 2026, 8 October 2026



Learn more:

<https://spdci.org/events/dci-standards-in-action-challenge/>



Questions:

contact@spdci.org

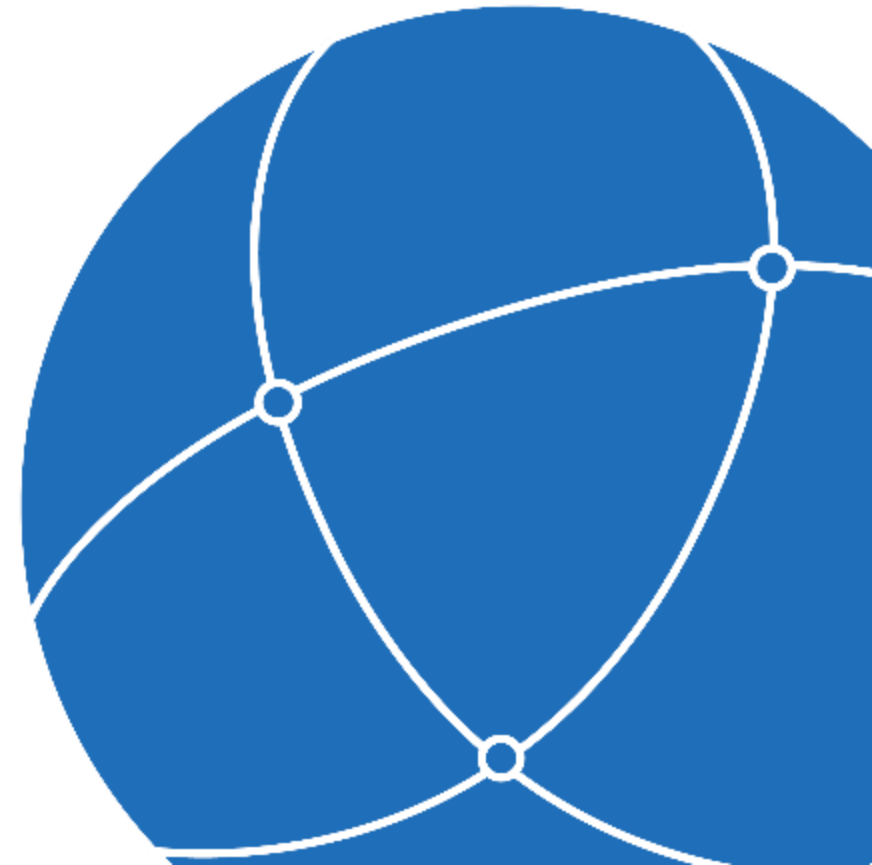
Open to government agencies, implementers, development partners, technical teams, and other stakeholders.
Cross-sector submissions are encouraged (including health).

Learn more and connect

The DCI is an **open, transparent and virtual community** which welcomes contributions from diverse stakeholders.

For more information, or to get involved:

- ✓ visit our [website](#)
- ✓ email us at contact@spdci.org
- ✓ or check us out on [LinkedIn](#), [Gitbook](#), and [Github](#)



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Thank you

