

Call for Transfer Experts

supporting the design, implementation, and
monitoring of the transfer component of the European
Urban Initiation – Innovative Actions

Terms of Reference

21 July – 12 September 2023



Co-funded by
the European Union



Contents

1.	INTRODUCTION TO EUI – INNOVATIVE ACTIONS (EUI-IA) AND ITS TRANSFER COMPONENT	1
2.	INFORMATION ON THE EUI-IA CALL FOR PROPOSALS	5
3.	DEFINITION OF THE NEED.....	5
4.	SELECTION	9
5.	INDICATIVE TIMELINE FOR THE THREE TASKS AND THE SELECTION	11
6.	CONTRACTUAL DETAILS.....	12
7.	EUI POOL OF EXPERTS	15

LIST OF ABBREVIATIONS

ERDF	European Regional Development Fund
EUI	European Urban Initiative
EUI-IA	European Urban Initiative – Innovative Actions
Permanent Secretariat	European Urban Initiative Permanent Secretariat

1. INTRODUCTION TO EUI – INNOVATIVE ACTIONS (EUI-IA) AND ITS TRANSFER COMPONENT

1.1 Innovative Actions

The Innovative Actions pillar of EUI provides two levels of support:

- **Funding for testing** (piloting) innovative solutions **and for preparatory activities for transferring the pilot solutions**. Each EUI-IA project can receive up to a maximum of EUR 5 million ERDF co-financing. EUI-IA co-finances up to 80% of project's activities. The project implementation must take place within 3,5 years.
- **Capturing, sharing and transferring the knowledge** that projects are generating. EUI is interested in understanding what worked in the implementation of the innovative solution and what did not work, in order to draw lessons, capture the knowledge and share it with urban policymakers and practitioners across Europe. Therefore, during the implementation of the innovative actions, EUI collects and shares the results from the experimentation of the projects. **This also feeds into transfer activities**, with the aim to foster innovation capacities and build knowledge for all EU urban areas and to mainstream innovative solutions in sustainable urban development.

EUI has a total ERDF budget of around EUR 450 million, out of which indicatively 75% will be allocated to EUI-IA projects which will be selected through Calls for Proposals on one or more topics proposed by the European Commission.

Specifically, EUI supports projects that are:

➤ **Innovative.**

Projects which are new, bold, creative and experimental. The proposed projects go beyond the present state-of-the-art and business-as-usual. Building on research and benchmarking, urban authorities demonstrated that the proposed projects have not been previously tested and implemented on the ground in the urban area, in the Member State where the urban area is located or elsewhere in the EU. Urban authorities proposed solutions (products, services, processes) that have evolved over time based on lessons learned from experience (evolutionary approach where the innovation lies in the new elements added to the idea) or completely new solutions never tested before in the policy field concerned (revolutionary approach) in the EU. Innovative elements included are the central components to the solutions proposed.

Urban authorities, as exclusive eligible applicants to the EUI-IA, in principle play a key role in the proposed project, by leading a local partnership aimed at achieving medium to long-term goals defined for their cities and/or being actively involved in an experimentation offering the best from the green and digital transitions to their population.

The innovations proposed are relevant to achieve Cohesion policy goals, and to the ERDF in particular, as prime source of funding for EUI-IA projects. Projects were selected as having the potential to inspire the use of mainstream programmes in urban areas once successfully tested, and possibly to benefit from these programmes for their upscale and replication throughout the EU.

➤ **Of good quality.**

Selected projects meet key quality standards such as clear and logical interrelation of objectives/activities/outputs, evidence of preparatory work, realistic ambitions, effective management structures and procedures, good value for money.

➤ **Participative.**

Selected projects seek to benefit from sources of external expertise from their local innovation ecosystems such as academia, industry, civil society and other levels of government both in the design and in the implementation of the project. To ensure the participative approach they defined effective mechanisms of consultation, coordination and co-design.

➤ **Measurable.**

Selected projects will be implemented in a way allowing to clearly explain what the changes are that they want to achieve in the local context as a result of their projects; to demonstrate how any change in the local situation is directly attributable to the new solution developed, and how the results can be measured, quantified and evaluated.

➤ **Sustainable and scalable.**

Selected projects were prepared in a way allowing to anticipate and explain how the solution will be sustained and scaled-up once successfully tested through the identification of adequate sources of public and/or private funding, including from Cohesion policy and/or project partners own resources and/or embedded mechanisms of financial self-sustainability (e.g. revolving funds, crowdfunding, revenues).

➤ **Transferable.**

Solutions developed in the framework of the projects have potential to be applicable and replicable by other cities across Europe, possibly by making use of the Cohesion policy funding available to them.

1.2 The transfer component of Innovative Actions

A key novelty in comparison to the Urban Innovative Actions projects financed during the 2014-2020 programming period is the embedment of a transnational transfer component as an integral part of EUI-IA projects.

It is important to underline that the primary focus of the EUI-IA projects remains on the testing of the innovative solutions in a given area, but with this new component it is expected that the processes and results of experimentation will be followed by partner cities from other countries (Transfer Partners).

EUI-IA is established to identify and support the testing of transferable and scalable innovative solutions to address issues related to sustainable urban development at the European Union level. It also aims to collect and share results from experimentations (also via supporting transfer activities) to foster innovation capacities and knowledge building for all EU urban areas. The objective is that EUI-IA project outputs are used (replicated, scaled up) by other EU cities increasing the impact of the whole Initiative, contributing to urban policymaking on different levels, as well as supporting cooperation between European urban areas.

Introducing the transfer component into the EUI-IA projects, should achieve the following objectives:

- To increase the general adaptability and replicability of the innovative solution developed by the EUI-IA project to other urban areas in the EU and then enhance its chances to be replicated abroad and deployed at wider scale (possibly with funding from mainstream Cohesion policy programmes).
- To allow Transfer Partners to raise their own innovation potential and increase their capacity for implementing innovative solutions (both in terms of content and process).
- To prepare the process of replicating the tested innovative solution in the cities participating in the transfer activities and benefiting from a ready to replicate solution.
- To contribute to the improvement of local policies and strategies.
- To support knowledge exchange between all Partners.

The Main Urban Authority (EUI-IA beneficiary) holds the responsibility for the identification and selection of the Transfer Partners that will integrate to the Partnership. The process of identifying Transfer Partners should start already at the application stage, when applicants are asked to identify other European urban areas that could benefit from replicating the proposed solution in view of the favourable conditions for transfer (similar characteristic, contexts) or of increasing their innovation potential; to elaborate on how the most suitable Transfer Partners will be identified; and if already identified, specify potential Transfer Partners together with the underlying motivations/rationale. Transfer Partners must be identified at the latest during the Initiation Phase.

The selection of the Transfer Partners should allow: (i) to maintain a good balance in terms of variety of cities involved in the Partnership (their size (small, medium-sized, large cities) and localisation (less developed, transition and more developed regions)), and (ii) to gather the most relevant Transfer Partners for the quality of the replication activities.

Therefore, the selection of the Transfer Partners follows some guiding principles:

- Transfer Partners come from different EU Member States;
- At least two of the four cities involved (MUA + the 3 Transfer Partners) are located in less developed or transition regions;
- The partnership includes cities of different sizes.

Transfer activities and working methods will focus on:

- allowing Transfer Partners to follow the planning and piloting of the tested innovative solution,
- allowing Transfer Partners to analyse their local urban contexts in order to better understand how the innovative solution can be adapted to meet local needs and conditions,
- exchanging knowledge and experience between all the Project Partners,
- sharing critical inputs that can both bring the external perspective to the EUI-IA project and inspire Transfer Partners,
- the preparation by Transfer Partners of a documentation that can serve them for the future replication of the innovative solution (Replication Feasibility and Opportunity Study and investment documentation),
- the preparation, by the MUA and its Project Partners, of the legacy of the EUI-IA project in the form of a EUI - Innovative Solution Model to be used by other EU cities interested in the innovative solution.

The above activities can be realised using the following palette of working methods (including but not limited to): site visits; on-line or off-line workshops/meetings/discussions; peer review activities; own work of the Transfer Partners allowing them to further capitalise on learnings coming from the transfer exchange but also to prepare for future adaptation and replication of the innovative solution; other forms of work and cooperation that the Project Partners wish to introduce: work shadowing, conferences, thematic activities, being part of Advisory Board or Steering Committee, etc.

Transfer Partners are expected to prepare the following pre-defined outputs:

- Transfer Capacity Survey – two self-assessment surveys for each Transfer Partner (at the start and at the end of the project).
- Replication Feasibility and Opportunity Study (one per each Transfer Partner).

Moreover, if fitting within the timeframe and allocated budget, Transfer Partners are also allowed to finance:

- Investment documentation needed for the implementation of the innovative solution – expertise, legal analysis, construction project, environmental impact analysis, etc. and the implementation of a small-scale pilot investments.

The allocated budgets for each Transfer Partner is a lump sum (simplified cost option) amounting to EUR 150 000 (corresponding to EUR 120 000 ERDF and own contribution of EUR 30 000).

Experts interested in applying for the Call for Transfer Experts are requested to familiarize themselves with Annex 1 which presents an extract from the EUI-IA Guidance: Chapter 5 “Transfer” (presenting in more details aspects summarised above). The full text of the EUI-IA Guidance document can be found here: https://www.urban-initiative.eu/sites/default/files/2023-05/EUI-IA%20GUIDANCE_7X2022.pdf

2. INFORMATION ON THE EUI-IA CALL FOR PROPOSALS

During 2021-2027 programming period four EUI-IA Calls for Proposals are being planned.

First EUI-IA Call for Proposals was launched on 10th October 2022 and closed on 19th January 2023. It was dedicated to one topic: New European Bauhaus demonstrators. As a result of the call, **14 projects** have been approved for funding and will enter the Initiation Phase in September 2023.

Second EUI-IA Call for Proposals was launched on 31st May 2023 and will close on 5th October 2023. It is dedicated to three topics: Greening cities, Sustainable tourism and Harnessing talent in shrinking cities. It is expected to select **around 25 projects**.

Third Call for Proposals is planned to be launched in May 2024 (closing in October 2024). Topics will be decided and communicated by the European Commission in spring 2024. It is expected to select **around 25 projects**.

Forth Call for Proposals will have a modified, experimental character aiming at identifying smaller and shorter pilot projects. Number of projects to be selected, as well as the format of transfer component under this Call is still to be decided and designed.

3. DEFINITION OF THE NEED

The Permanent Secretariat wishes to set up a group of experts to design and operationalise, in collaboration with the Permanent Secretariat, the transfer component of EUI-IA, to be implemented by the projects selected by EUI-IA Call for Proposals, support projects in implementing transfer activities

and to monitor transfer component as a new EUI-IA feature. The Permanent Secretariat foresees the constitution of a group of 4 experts – three Transfer Experts and one Coordinator of Transfer Experts (Coordinator).

Candidates are invited to express their willingness to participate as a Transfer Expert or as Coordinator.

The work will be focussing on the three following tasks:

- Task 1 – Design of the transfer component
- Task 2 – Trainings and expert support for the Main Urban Authorities and Transfer Partners
- Task 3 – Monitoring of the implementation of the transfer component

3.1 Task 1 – Design of the transfer component

The first task is dedicated to designing in details (in close collaboration with the Permanent Secretariat) all the elements of the transfer component identified under the framework presented in section 1.2 above (and in full details in EUI-IA Guidance Chapter 5), their interconnections, and tools to be used by the projects and Transfer Partners.

The design process shall follow some key principles:

- Be conducted in close collaboration with the Permanent Secretariat who designed the transfer framework and holds the overall responsibility of its implementation.
- Propose a methodology applicable to all the projects (regardless the topic of the Call, size of the city implementing the project and specific characteristics of the implemented innovative solutions).
- Be of a simple design, enabling the Main Urban Authorities to smoothly implement the Work Package Transfer in the dedicated timeframe (between 2,5 to 3,5 years) and without affecting the key focus of the project which should remain on piloting the innovative solution.
- Allow for continuous improvement depending on the results of the monitoring and external evaluation (and also feedback from the Main Urban Authorities responsible for implementing EUI-IA projects, as well as Transfer Partners) in order to improve the transferability of the solutions throughout the subsequent Calls for Proposals.

The following main activities are to be delivered under Task 1:

1. Ideation workshop

Transfer Experts shall organise a 1-day in-person ideation workshop with staff of the Permanent Secretariat, in order to prepare for the work to be performed. The workshop will aim to:

- Identify and specify the needs of the Permanent Secretariat in terms of full design and implementation of the transfer component of EUI-IA projects.
- Advance detailed understanding and logic of all transfer component elements, as well as interconnections between them.

- Specify scope and format of all tools to be used by the Main Urban Authorities and Transfer Partners.
- Constitute a basis for developing a detailed transfer methodology together with transfer framework described in EUI-IA Guidance Chapter 5 (see Task 2 below).

Expected date of delivery: first half of November 2023.

2. Development of the transfer methodology

Based on (i) the results of the ideation workshop and (ii) the framework described in EUI-IA Guidance Chapter 5, Transfer Experts are expected to detail the methodology of the transfer component of EUI-IA projects, to be validated by the Permanent Secretariat.

Expected date of delivery: end of January 2024.

3. Design of tools and templates to be used by the Main Urban Authorities and Transfer Partners

Following designed methodology, Transfer Experts are expected to design all tools and templates that will be used by the Main Urban Authorities and Transfer Partners, especially:

- Transfer Capacity Survey – two self-assessment surveys used by each Transfer Partner (at the beginning and at the end of the Work Package Transfer) allowing them to assess their readiness for replicating innovative solution at the beginning and at the end of the transfer cooperation (learning deliverable).

Expected date of delivery: February 2024

- Replication Feasibility and Opportunity Study – (one per each Transfer Partner) summarising what is the local challenge, how the transferred innovative solutions can be adapted to the local context, what are the necessary steps to implement it, what are the identified funding sources, how management structure and key management processes can be shaped, etc. (investment output).

Expected date of delivery: February 2024 (first draft to be presented to the Main Urban Authorities and Transfer Partners after Permanent Secretariat's validation; to be further finalised after the first lessons learnt from the transfer cooperation of Call 1 projects); August 2026 (final version to be used by the Transfer Partners).

- Other potential tools to be developed following the design of transfer methodology.

3.2 Task 2 – Trainings and expert support for the Main Urban Authorities and Transfer Partners

The second task is dedicated to the (i) trainings for the Main Urban Authorities (and their Partners) on how to organise and implement transfer activities in a way allowing to reach ambitions behind this new EUI-IA component, as well as how to practically use the transfer tools; (ii) ad-hoc expert support for the Main Urban Authorities and Transfer Partners.

1. Trainings for the Main Urban Authorities

It is foreseen that for projects selected after each Call for Proposals, trainings on how to manage an effective international transfer cooperation will be organised. Each group of projects will start with an introductory training. Potential other trainings and different formats of collective capacity building offers are foreseen as well, depending on observed needs and quality of implemented transfer activities.

Under the first Work Order following this Call for Experts, an introductory training for the Call 1 Main Urban Authorities is planned in order to:

- Familiarize the Main Urban Authorities (and their Partners) with the transfer methodology, all its elements and tools.
- Prepare the Main Urban Authorities to develop a good quality Transfer Work Package meeting all Permanent Secretariat's requirements and overall transfer ambitions.
- Improve the general capacities of the Main Urban Authorities to coordinate transfer activities.

Expected date of delivery: March 2024.

2. Ad-hoc expert support for the Main Urban Authorities and Transfer Partners

Within the pool of different experts supporting implementation of EUI-IA projects, Transfer Experts are foreseen as well. It is planned that each Main Urban Authority can request up to 3 days of individual support from a Transfer Expert. Additionally, also each Transfer Partner can request up to 1 day of individual support. Support can be dedicated to:

- Support for the Main Urban Authorities / Transfer Partners with advice and help in planning their transfer activities or solving their individual challenges related to transfer activities.
- Requesting expert's facilitation for a transfer activity (facilitation of a workshop, site visit or any other form of online or in-person exchange).
- Requesting (by a Transfer Partner) support in planning and structuring their own transfer activities and participation in the EUI-IA project implementation in order to make this learning opportunity as useful as possible.
- Other types of requests, prior validation by the Permanent Secretariat.

Requests for ad-hoc individual support will be submitted by the Main Urban Authorities (also on behalf of their Transfer Partners) to the Permanent Secretariat for validation and allocation of a Transfer Expert. Permanent Secretariat will be responding to requests in a cooperation with a Coordinator (analysis of needs, identification of the most suitable Expert to respond to them). After each mission, Transfer Expert supporting the project will be required to submit a short report summarising scope of support and observations regarding progress in implementing transfer activities.

It should be noted that the role of Transfer Expert will have a complementary character to the role of EUI Experts working with the projects on all aspects of implementation of their innovative solutions.

3.3 Task 3 – Monitoring framework

This task covers the design and implementation of monitoring framework of the transfer component of EUI-IA, starting from Call 1 onwards.

1. Design of monitoring framework

Monitoring framework should allow, inter alia: analysing how the transfer component of EUI-IA projects in its designed shape is meeting the objectives set by the Initiative, what is the overall scope and quality of the transfer activities implemented by the projects, how learning experience for the Transfer Partners can be assessed, are transfer tools useful and being used, how exchange between Transfer Partners and MUAs' is enriching the project implementation...

Monitoring framework should capture both perspectives – at projects level and at the Initiative level (contributing as well to the overall monitoring framework).

Experts selected by this Call for Experts are expected to take part in designing monitoring framework. However, monitoring activities will be in principle implemented by the Coordinator of Transfer Experts with inputs from the Permanent Secretariat, from Transfer Experts and from EUI Experts working with the projects.

Expected date of delivery: end of January 2024.

2. On-going monitoring

Coordinator will be responsible for conducting on-going monitoring activities following designed framework. 4 days per year are foreseen for this activity for the Coordinator.

It should be noted that evaluation (design of the evaluation methodology and its implementation) will be subject to a separate tender to allow for an independent, external perspective. Evaluation should allow for a better understanding of the efficiency, effectiveness, and impact of the transfer component. It should capture lessons learned for continues improvement and future programming period (3rd edition of EUI). The evaluation should allow presenting the results of the implementation of transfer component (i.e. achievement of transfer objectives).

4. SELECTION

4.1 Selection Criteria

In order to be selected for any mission within the EUI pool of experts, the following eligibility criteria apply, along with any additional mission-specific requirements.

- Fluency in English (written and spoken, C1 level certificate¹ required from non-native speakers)
- University degree in any of the fields indicated below plus the minimum number of years of relevant work experience in topics related to Sustainable Urban Development (SUD) within Cohesion Policy (see Annex 2 SUD-related themes), specifically:
 - Doctoral degree (PhD) and at least 7 years of relevant work experience
 - OR Master's degree and at least 10 years of relevant work experience
 - OR Bachelor's degree and at least 12 years of relevant work experience
- IT literacy

Mission-specific requirements:

- University degree in any field related to urban development (spatial planning, local/regional development, geography, environmental studies, sustainability studies, cultural studies, heritage studies, social studies, architecture, housing, revitalisation, urban planning/design, environmental studies, urban mobility, engineering, etc.).
- Proven solid track record in similar work: facilitating/managing/supporting international transfer, knowledge exchange, or networking activities, transfer of good practices.
- Experience in facilitating learning among cities.
- Understanding of the urban dimension of EU policies and of Cohesion Policy in particular.
- Excellent communication skills (written and verbal).
- Ability to work in a team, under pressure and to tight timeline.

In addition to the above, for the role of Coordinator, applicants must fulfil the following criteria:

- Demonstrable experience in facilitating group work and reaching set objectives.
- Capacity to manage a group of experts from different nationalities.
- Ability to effectively organise group work in order to delivery high quality work and meet deadlines.

4.2 Applications

Experts interested in applying in the framework of the present Call for Applications **shall submit** the following:

- **CV in English** detailing Applicant's qualifications and work experience.

¹ Non-exhaustive list of accepted certificates: TOEFL®, IELTS, PTE Academic, Cambridge English Qualifications, EFSET, Duolingo English Test, Test of English for International Communication (TOEIC), Business English Certificate (BEC), Integrated Skills in English exams (ISE). Candidates without a certificate will be required to pass an online English test organised by EUI.

Important! The relevant duration in months along with the start date and end date must be provided for any employments or missions.

- **A filled in Application Form on EU Survey:** https://ec.europa.eu/eusurvey/runner/EUI-IA_Call_TransferExperts
 - Examples of previous work can be included as attachment or hyperlinks. Any examples of previous work must be limited to relevant examples to support the knowledge and skills required in the framework of the present Call.

The deadline for receipt of the applications is 12th September 2023 by 23.59 CEST.

4.3 Selection procedure

The selection of applications for the EUI Pool of Experts will be performed by the Permanent Secretariat and an external service provider selected by the Entrusted Entity through an open call for tender.

The selection procedure will be undertaken in two stages:

- Eligibility Assessment
- Quality Assessment

The eligibility assessment will be done by the external service provider. A long-list of candidates will be presented to the Permanent Secretariat on the basis of the eligibility of received applications. The quality assessment will be done by the Permanent Secretariat. Applications from all eligible candidates will be checked against role-specific requirements. Quality assessment will consist of two steps: (i) quality assessment of the received application documents and (ii) interviews with the short-listed candidates. Short-listed candidates will be interviewed by the Permanent Secretariat in order to establish a final consolidated list. **Interviews will take place online.** Following the interviews with shortlisted candidates, the Permanent Secretariat will then select experts.

A proof of English language skills at C1 level will be required from shortlisted candidates prior to the interview unless English is listed as the candidate's native language. A language test can be organised at the expense of EUI if needed, but it is highly recommended that applicants upload the proof of language level in the application form.

5. INDICATIVE TIMELINE FOR THE THREE TASKS AND THE SELECTION

Selection procedure	
21 July 2023	Launch of the Call for Transfer Experts
12 September 2023	Deadline for applications

10 October 2023 (tbc)	Shortlisted candidates are informed and invited to choose a date/time for interview
19-20 October 2023 (tbc)	Interviews take place online
25 October 2023 (tbc)	Selection notification
30 October 2023 (tbc)	Kick-off meeting for selected Experts

Indicative timeline of the first Work Order following this Call for Experts	
First half of November 2023 (suggested date: 14 November 2023)	Ideation workshop
January 2024	Development of the transfer methodology
January 2024	Design of monitoring framework
February 2024	Design of tools and templates to be used by the Main Urban Authorities and Transfer Partners (including Transfer Capacity Survey and first draft of Replication Feasibility and Opportunity Study)
March 2024	Kick-off training for Call 1 Main Urban Authorities
August 2026	Template of Replication Feasibility and Opportunity Study finalised
March 2024 – August 2027	Ad-hoc expert support for Call 1 Main Urban Authorities and Transfer Partners Monitoring activities

6. CONTRACTUAL DETAILS

6.1 Contractual management

The external service provider, in charge of the eligibility assessment of the received applications will be also responsible for the contractual management of the selected experts.

A contract will be signed between the external service provider and each selected expert. Shortlisted experts who are invited to join the pool will not be contracted unless they are selected for a mission.

The Permanent Secretariat will coordinate and support the activities of the external service provider. Only Permanent Secretariat is responsible for the quality control of the activities and deliverables of the members of the Pool of Experts.

6.2 Fees

The daily rate of experts is fixed at **EUR 750, VAT included**. The payments will be financed in the framework of the EUI.

In addition, travel and accommodation costs will be covered by the EUI according to the refunding conditions communicated to the experts in advance and after reception by the external service provider of the declarations of expenses form and justifications of payments.

The total number of days to be allocated to each expert depends on the number of Work Orders signed.

6.3 Overall timeline and the indicative breakdown of the days

Regarding Transfer Experts, the Permanent Secretariat is looking to contract interested Experts initially for the period October 2023 – August 2027 (period covering Initiation Phase and Implementation phase for EUI-IA Call 1 projects). This period is to be further specified by Work Orders regulating the time and scope of the actual involvement and in order to ensure coherent approach across the Calls, might be proposed for extension with transfer tasks related to Call 2, Call 3 and Call 4 projects until December 2029 (see below).

With the first Work Order (following this Call for Experts), Transfer Experts will be contracted for the development of the transfer methodology and its tools; development of the transfer monitoring framework; kick-off training for the Call 1 Main Urban Authorities; and ad-hoc support for Call 1 projects on transfer component (Main Urban Authorities and Transfer Partners).

Subsequent Work Orders will be proposed by the Permanent Secretariat based on the expert's performance and their availability. Each Work Order will be individually discussed with each expert who can accept or reject it. Following tasks are foreseen for the future: support for the Main Urban Authorities (and their Transfer Partners) implementing Call 2, Call 3 and Call 4 projects; monitoring of the implementation of transfer component of Call 2, Call 3 and Call 4 projects.

Regarding the Coordinator of the Transfer Experts, the Permanent Secretariat is looking to contract interested experts for the full period October 2023 – December 2029. Coordinator will be contracted for the coordination of the development of the transfer methodology and its tools; coordination of the development of the transfer monitoring framework; coordination of developing and proposing potential changes and updates to be introduced (if necessary) as a result of monitoring and external evaluation results; coordination of trainings (notably kick-off trainings) for Call 1, Call 2, Call 3 and Call

4 Main Urban Authorities; overall coordination of ad-hoc support for EUI-IA projects on transfer component.

In details, Work Order following this Call for Transfer Experts, will cover the following activities*:

no of days per Expert	activity	allocation of activity
3	Ideation workshop [Task 1, Activity 1]	Transfer Experts; Coordinator of Transfer Experts
7	Development of the transfer methodology [Task 1, Activity 2] and monitoring framework [Task 3, Activity 1]	Transfer Experts; Coordinator of Transfer Experts
5	Design of tools and templates to be used by the Main Urban Authorities and Transfer Partners [Task 1, Activity 2]	Transfer Experts; Coordinator of Transfer Experts
2	Kick-off training on EUI-IA transfer activities for Call 1 Main Urban Authorities [Task 2, Activity 1]	Transfer Experts; Coordinator of Transfer Experts
based on request	Ad-hoc support for the Main Urban Authorities and Transfer Partners [Task 2, Activity 2]	Transfer Experts
4 days per year (to be further defined following the designed monitoring framework)	Monitoring and reporting of the implementation of a transfer component [Task 3, Activity 3]	Coordinator of Transfer Experts
2 days per year	Overall coordination of transfer activities and Transfer Experts' involvement	Coordinator of Transfer Experts

Presented allocation of number of days per activity has an indicative character. Permanent Secretariat reserves the right to modify this assumption based on mutual agreement with the experts.

Additionally, if necessary, the Permanent Secretariat envisages recruitment of additional Transfer Experts joining the group in order to support Call 2, Call 3 and Call 4 projects in implementing transfer component (once a group of the EUI-IA projects to be supported will be bigger).

6.4 Incompatibility of EUI Experts with other positions

To avoid any conflict of interest, role of Transfer Expert cannot be combined with a role of Assessor or Coordinator of Assessors selecting EUI-IA projects under given Call (Experts involved in selecting projects under given Call cannot be further involved in supporting them).

7. EUI POOL OF EXPERTS

For the entire duration of the EUI, a Pool of EUI Experts will be set up. The Pool of Experts will gather experts who will be cooperating with the Permanent Secretariat to support the implementation of the innovative actions projects, capitalisation or capacity-building activities or solicited for ad-hoc expertise upon need of the Permanent Secretariat and for the support to the Urban Agenda for the EU. Within the Pool of Experts, the Permanent Secretariat can launch specific calls for interest, to which experts or teams of experts can answer and be selected.

Experts invited to join the Pool of EUI experts will have an opportunity be involved in future relevant EUI activities by taking part in the upcoming calls for interest and then being contracted for the given activity.



Co-funded by
the European Union



Les Arcuriales, 45D rue de Tournai, 7th floor, 59000 Lille - France
info@urban-initiative.eu - www.urban-initiative.eu