



# Open call for EUI pool of experts with focus on the Urban Agenda for the EU and knowledge activities

Terms of reference

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# Contents

- 1. CONTEXT OF THE CALL AND SELECTION PROCESS..... 2**
- 2. BACKGROUND INFORMATION AND CONTEXT ..... 3**
- 3. REQUIRED EXPERTISE IN DETAIL AND RELATED TASKS..... 7**
  - 3.1. EX-ANTE ASSESSMENT UNDER THE URBAN AGENDA FOR THE EU ON THE THEME “COMPACT CITIES” ... 7
  - 3.2. AD-HOC EXPERTISE TO SUPPORT THE URBAN AGENDA FOR THE EU ..... 13
  - 3.3. EXPERTISE TO SUPPORT THE IMPLEMENTATION OF EUI KNOWLEDGE ACTIVITIES ..... 16
- 4. APPLICATION AND SELECTION PROCEDURE ..... 21**
  - 4.1. APPLICATION ..... 21
  - 4.2. SELECTION PROCEDURE ..... 22
  - 4.3. CALENDAR ..... 24
- 5. CONTRACTUAL DETAILS ..... 26**
  - 5.1. CONTRACTUAL MANAGEMENT ..... 26
  - 5.2. FEES..... 26

# 1. CONTEXT OF THE CALL AND SELECTION PROCESS

This open call aims at selecting individual experts in one or several of the following three sections:

## **Performance of an Ex-Ante assessment for a future UAEU Partnership:**

- 1) Performance of an Ex-Ante Assessment under the Urban Agenda for the EU on the topic **“Compact Cities - Sustainable urban planning and sprawl mitigation”**. This task includes the support of an open call and assessment of applications for the composition of a future UAEU Thematic Partnership if the Ex-Ante Assessment is being endorsed by the UAEU governance structure. The envisaged period for the implementation is between **November 2024 and December 2025** (see Section 3.1.)

## **General Recruitment of experts for the EUI - Pool with focus on the UAEU and knowledge activities:**

- 2) **Ad-hoc expertise for tasks concerning the Urban Agenda for the EU/Intergovernmental Support. This expertise include (see section 3.2.):**

- External expertise service for UAEU Thematic Partnerships
- General ad-hoc requested expertise focused on the Urban Agenda for the EU and Intergovernmental Cooperation

- 3) **Overall support for the implementation of the EUI Knowledge Management Strategy. This includes (see section 3.3.):**

- Thematic and operational expertise service for policy labs
- Thematic and operational expertise service for focused policy labs
- Thematic and operational expertise service for policy briefs
- Thematic and operational expertise service for editorial tasks
- Thematic and operational expertise service for other needs related to the EUI Knowledge management Strategy

**The Call will be open from 1 August 2024 until 30 September 2024, 14:00 CET.**

Once the Call is closed, the assessment of the applications will start on 1 October 2024 (see calendar in section 4.3 for more details).

Applicants are invited to submit their applications **as described in section [4] of this document and** via application form on the EUI homepage: [LINK APPLICATION FORM](#)

For the tasks described in sections 3.2 and 3.3, the call is specifically addressed to candidates who are not currently part of the EUI pool of experts. Contracting and work for these tasks is expected to take place mainly in 2025. Therefore, there will be no immediate contracting, but selected candidates will be integrated into the pool of experts for possible future tasks and assignments. A specific call for expressions of interest or direct appointments will be used to select experts for the pool on the basis of specific work requirements.

The EUI Permanent Secretariat (PS) reserves the right to cancel this open call if the selection process is unsuccessful.

## 2. BACKGROUND INFORMATION AND CONTEXT

### **The European Urban Initiative**

The European Urban Initiative is an essential tool to support cities of all sizes, to build capacity and knowledge, to support innovation and develop transferable and scalable innovative solutions to urban challenges of EU relevance. The legal basis of the European Urban Initiative is included in Article 12 of Regulation (EU) 2021/1058 of the European Parliament and of the Council of 24 June 2021 on the European Regional Development Fund and on the Cohesion Fund<sup>2</sup> (hereinafter 'the ERDF/CF Regulation') that provides for the main content and strategic framework of the initiative. The overall objectives of the EUI are

- (i) to strengthen integrated and participatory approaches to sustainable urban development, and
- (ii) to provide a stronger link to EU policies, and in particular to Cohesion policy.

The initiative is aimed to offer coherent support to cities to overcome the current fragmented landscape of manifold initiatives, programmes and instruments in support of cities under Cohesion policy. As part of its strategic approach, the EUI shall cover all urban areas, including large, small and medium-sized cities ('cities of all sizes') as well as functional urban areas. It shall support the Urban Agenda of for the EU, and upon request from one or more Member State(s), the EUI may support the intergovernmental cooperation on urban matters. In this context, the goal is to generate additional

effective interconnections and synergies between the activities of the EUI and of the UAEU and the intergovernmental cooperation.

### The Urban Agenda for the EU

The Urban Agenda for the EU is an **innovative multi-level governance initiative on urban policy**, developed in the scope of intergovernmental cooperation on urban matters, and officially established by the [Pact of Amsterdam](#) in 2016. It enables cities, Member States, city networks, the European Commission, other EU institutions, the Union’s advisory bodies, and other stakeholders to come together to **jointly tackle pressing urban matters** and deliver concrete outputs for the benefit of EU citizens. The Urban Agenda for the EU is **boosting the role of cities** in national and EU policymaking to better connect the EU with citizens’ needs. It is a key delivery mechanism at EU level for the [New Urban Agenda \(Habitat III\)](#).

Making **multi-level governance** tangible has been recognised as one of the most important successes of the Urban Agenda for the EU. Multi-level governance is crucial beyond this initiative and at the EU level, it is widely promoted through **Cohesion policy** in order to target the investments in the most efficient and balanced way.

The Urban Agenda seeks to stimulate actions along three key objectives (or “pillars”): **Better Regulation, Better Funding and Better Knowledge**.



Figure 1 - Source: EUI

In addition, the UAEU aims to address several cross-cutting issues<sup>1</sup> and thematic priorities. The Pact of Amsterdam led to the selection of an initial list of 12 priority themes for challenges to be addressed in Thematic Partnerships. In 2018, two more themes were added, and two Thematic Partnerships launched accordingly’ (Assessment study, 2019). Lastly, in 2021 the Ljubljana Agreement defined other four thematic focuses: Greening Cities, Sustainable Tourism (which have been launched in

<sup>1</sup> The seven cross-cutting issues are: Urban policy for the common good; Integrated and innovative approaches; Effective urban governance, participation and co-creation; multilevel governance; place-based approach and 3 spatial levels of the new Leipzig Charter; Planning and balanced territorial development; International dimension.

winter 2022) and Food and Cities of Equality (which have been launched in winter 2023). The Gijon Agreements (2023) proposed a selection of priority themes for future partnerships and agreed on seven new cross-cutting issues.

The 18 Thematic Partnerships have brought together more than 330 partners/members ranging between local, regional and national authorities, European Institutions, NGOs and Umbrella Organisations, research institutions, programmes and networks as well as private companies.

## **The EUI Knowledge Management Strategy**

The EUI Knowledge Management Strategy aims to establish a comprehensive and accessible knowledge base to support sustainable urban development. The strategy focuses on the generation, dissemination and use of knowledge to improve urban policy-making and implementation.

### **1) Objectives**

The main objectives of the strategy are:

- a) Develop a knowledge base to support the design, implementation and mainstreaming of sustainable urban development policies and strategies.
- b) Capture, analyse and systematically disseminate both operational and thematic knowledge generated by EUI activities, including those under the EU Urban Agenda.
- c) Provide urban policy makers and practitioners with consolidated knowledge to support evidence-based policy making and effective public investment, in particular in the context of cohesion policy.

### **2) Scope of knowledge**

The strategy identifies two main types of knowledge: thematic knowledge and operational knowledge.

- Thematic knowledge: this includes information related to key policy areas such as green infrastructure, digital transformation and social inclusion. It is derived from EUI activities, including innovative action projects and capacity building exercises, ensuring its relevance and usefulness in different urban contexts.

- Operational knowledge: this includes practical insights into the design and implementation of urban projects, strategies and policies, and includes best practices, methodologies and lessons learned from various EUI initiatives and in relation to operational challenges.

### **3) Capitalising on knowledge**

The strategy emphasises knowledge capitalisation through three activities:

- a) Policy labs: extended exercises involving experts, city representatives, and stakeholders to gather and synthesise knowledge on specific topics over several months. These labs facilitate peer learning, identify best practices, and develop policy recommendations.
- b) Focused policy labs: short, intensive workshops designed to address specific urban challenges, producing actionable insights and recommendations in a condensed timeframe.
- c) Policy briefs: in-depth analyses and recommendations based on the outcomes of Policy labs and other knowledge inputs, structured to be accessible and useful to policymakers and practitioners.

### **4) Portico**

At the heart of the knowledge management strategy is Portico, the European Urban Knowledge Platform. Portico serves as a comprehensive repository of knowledge, organising and disseminating the outputs of the EUI. It is based on three pillars:

- a) Knowledge Hub: integrates resources and tools from different initiatives, providing a curated selection of content that enhances the skills and knowledge of urban practitioners.
- b) Urban Panorama: provides a landscape view of actors, initiatives and services in sustainable urban development, helping practitioners to identify and connect with relevant resources and opportunities.
- c) Community: fosters a dynamic collaboration and exchanges between urban practitioners, policy makers and experts, facilitating collaboration and peer-to-peer learning.

### 3. REQUIRED EXPERTISE IN DETAIL AND RELATED TASKS

#### 3.1. EX-ANTE ASSESSMENT UNDER THE URBAN AGENDA FOR THE EU ON THE THEME “COMPACT CITIES”

##### **Ex-Ante Assessment**

The Ex-Ante Assessment (EAA) will follow the objectives agreed in the [Multi-Annual Working Programme](#) of the Urban Agenda for the EU. It is the first step towards the creation of Thematic Partnerships and Other Forms of Cooperation (OFC) as part of the Urban Agenda for the EU. It is an exploratory process, which will allow for the deployment of a pragmatic, effective and result-oriented approach aiming at increasing the impact of future UAEU deliverables. The EAA will conduct an in-depth analysis of the proposals for new themes to help optimise focus, timing and activities of the multi-level cooperation as well as safeguard the suitable level of partners' thematic and procedural expertise. It should still allow the flexibility in the work and decision making of partnership according to the spirit of the UAEU.

It can be considered as a strategic and pragmatic tool checking whether a multi-level governance approach to deliver on the objectives of the UAEU for a specific theme or question related to sustainable urban development fits in a favourable policy and regulatory context.

The objective of the expert work will be to organise and produce the Ex-Ante Assessment of the new theme “**Compact Cities - Sustainable urban planning and sprawl mitigation**” in view of proposing an analysis and recommendations as to the conditions to launch a call to create a new Thematic Partnership / Other Form of Cooperation of the UAEU and to serve as a background document for the call for partners. The expert will carry out desk research, will collect information from organisations and institutions of relevance, including discussions with relevant Directorate Generals of the European Commission, and will produce a report. In addition, s/he will help the Permanent Secretariat and DG REGIO in the call for selection of partners.

##### **The new theme: “The Compact Cities – Sustainable urban planning and sprawl mitigation”**

The new theme “The Compact City” was endorsed during the meeting of the Directors General for Urban Matters (DGUM) on 26 June 2024 under Belgium EU-Presidency. With significant part of the European Union territory directly covered by urban land use, the management of urban areas is a key



component of any sustainable development policy. European local, regional and national authorities have substantial responsibilities in the field of urban planning. In particular, they are responsible for the successful implementation of EU policies influencing spatial planning at local, regional and national levels. However, Europe's municipalities, regions and national governments face diverse planning challenges (e.g., waste management, exploitation of renewable energies, climate changes etc.), which can have a major impact on citizens' quality of life. Planning authorities must consider an increasing number of European regulations to implement, in addition to existing national urban planning policies.

Urban sprawl is one of the biggest challenges in this regard. It is driven by demographic, economic, geographic, social and technological factors. These include rising incomes, preferences for living in low-density areas, natural barriers to contiguous urban development and the technological progress in car manufacturing. Urban sprawl has significant environmental, economic and social consequences. It leads to higher emissions from road transport and loss of open space and environmental amenities. It also increases the cost of providing key public services, exerting pressure on local public finance. Finally, it reduces housing affordability as its main drivers limit the supply of housing in key areas. The theme should address the following topics:

- Solutions combating the urban sprawl and its effects and supporting mitigation of negative suburbanisation effects
- Land use policies, in particular policies able to coordinate the spatial planning across administrative boundaries – in functional urban areas (i.e., reforms of land-use regulations and property regulations such as taxation)
- Transport policies (i.e., parking policies, sustainable means of transport, new and shared mobility)
- Better integration of socio-economic and environmental (Green and Blue Infrastructure) planning with spatial planning
- Better integration and implementation of sectoral policies and better understanding of their impact
- Relationship between EU Cohesion Policy and spatial planning
- Affordable housing
- Priority for high quality of public spaces
- Support for effective and functional inclusion of existing development areas in urban structures
- Social dimension in the process of urban planning
- Concept of compact city/15-min city

**Process:**

The EAA will be steered by the Urban Agenda Technical Preparatory Group (UATPG) as a whole, with a particular role of supervision from the Presidency and the European Commission. The UATPG will act as a sounding board for the deliverables and report to be developed by the expert. The EAA will follow a collaborative process and will include consultations with relevant services of the European Commission, Member States, city representatives and other actors, both for validation of the orientation as well as for the outcomes of the report. As the UATPG has the mandate to support operational steering of the UAEU by providing technical guidance and support to the Urban Development Group (UDG) and the Director Generals for Urban Matters (DGUM), consultation with these entities will also be part of the EAA process. The timing of the consultations will be in line with UATPG/UDG/DGUM meetings.

**Scope of Tasks**

The scope of the tasks under section 3.1. is still indicative, as some aspects of the UAEU TP preparation is part of a dynamic process. Minor changes on the task descriptions below and the related number of expert days will be finally agreed between the EUI-PS and the selected expert with the final service contract in November 2024. The analytical part of the EAA of the theme “Compact Cities” comprises a series of criteria chosen to establish its relevance in terms of scope and timing.

- Multi-level Governance
- Policy Environment
- Regulatory Environment
- Existing and Identified Gaps and Recommendations
- Trends and Evidence about EU-Cities

In addition, she/he will be responsible for the technical component of the call for partners, the analysis of the applicants and proposal for a composition of the future partnership/OFC as a result of the call for selection of partners managed by the EUI-PS and DG REGIO. The final Ex-Ante Assessment report will provide an input for open calls for Partners, inputs/guidelines for drafting the orientation paper and for overall conditions on the required parameters for the successful launching of a multi-stakeholder partnership on the given theme.

**Indicative Timeline and Deliverables**

The elaboration of tasks is indicated in the following work packages and smaller additional tasks related to support the EUI-PS for the work packages.

<b>Work Package 1: Design of research, interviews, methodology design and preliminary analysis</b>	
<b>Timeframe</b>	<b>App. 2 months</b>
<p><b>Task Description:</b></p> <p>Defining a methodology for analysis with the aim to cover the main objectives, by collecting and reviewing relevant documents/sources by doing desk research for the theme of the assessment.</p> <p><b>Interviews and meetings:</b></p> <p>In the first 2 months, the expert will carry out interviews with relevant Services of the European Commission as part of the research work on the defined criteria (including set-up of email and the preparation of interview material). Additionally, the expert needs to perform an exchange with the organisation/cities responsible for drafting the theme proposal in the first two months of the contract during an online meeting. The meeting will be organised with support of the EUI-PS. Information and contacts will be provided by DG REGIO and the EUI Secretariat.</p>	
<p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>▪ 1 methodology for analysis</li> <li>▪ Kick-off meeting with EUI-PS</li> <li>▪ Interviews with EU-Commission Services (at least 5)</li> <li>▪ 1 online-meeting with cities/organisations to fine-tune the scope of the investigation.</li> </ul>	
<b>Estimated number of senior expert days</b>	<b>12</b>

<b>Work Package 2: Preparation of the 1st Draft Report</b>	
<b>Timeframe</b>	<b>app 2 months</b>
<p><b>Task Description:</b></p> <p>The expert will draft an initial analysis with questions and issues for further discussion and deepened analysis which will constitute the 1<sup>st</sup> Draft Report. This should contain a preliminary analysis for assessment criteria to define a potential partnership composition, based on the desk research and first interviews. Additionally, the expert will inform the UATPG and UDG Members on the interim results. Feedback from written consultations will be considered.</p>	

<b>Deliverables:</b>	
<ul style="list-style-type: none"> <li>▪ Delivery of 1<sup>st</sup> draft Version of the EAA-Report including initial analysis</li> <li>▪ Participation in UATPG meeting (online)</li> <li>▪ Participation in UDG Meeting (in-person in Poland)</li> <li>▪ Delivery PPPs for UATPG and UDG Meeting</li> </ul>	
<b>Estimated number of senior expert days</b>	<b>12</b>

<b>Work Package 3: Drafting final Ex-Ante Assessment report</b>	
<b>Timeframe</b>	<b>app 2 months</b>
<p>The expert will elaborate a 2<sup>nd</sup> Draft Version of the EAA-Report. This Version will include the feedback from written consultations and recommendations on the call for partners. The 2<sup>nd</sup> Draft Version will be consulted with UDG Members and Commission Services.</p> <p>The expert will prepare the final report and include the feedback from the consultation. This comprises a short feedback table and an executive summary. The expert will present the results of the EAA during the DGUM meeting.</p>	
<b>Deliverables:</b>	
<ul style="list-style-type: none"> <li>• Delivery of the 2<sup>nd</sup> Draft Version</li> <li>• Support in the survey for comments for Consultation</li> <li>• Delivery of a 4 page-document to explain how feedback from UDG-consultation was included</li> <li>• Delivery of Final Ex-Ante Assessment Report</li> <li>• Participation in 1 DGUM meeting</li> <li>• Participation to UATPG online meetings</li> <li>• 2 PPP presentation (UATPG and DGUM)</li> </ul>	
<b>Estimated number of senior expert days</b>	<b>12</b>

<b>Work Package 4: Preparation of Call for Selection of Partners</b>	
<b>Timeframe</b>	<b>app 2 months</b>
<p>The expert will be responsible for the technical component of the call for selection of partners for the creation of a Thematic Partnership / Other Form of Cooperation for the previously assessed theme under the Urban Agenda of the EU managed by the EUI-PS and DG REGIO. This includes the elaboration of the Terms of Reference (Background Document) on the call criteria, the evaluation grid as well as the questions for the application form.</p> <p>To assure a good level of quality applications, EUI-PS will provide together with the expert a 2h applicant seminar (online).</p>	
<p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>▪ 1 Evaluation Grid</li> <li>▪ 1 Background Document defining the details for the call</li> <li>▪ Elaboration of questions for EU-Survey for selection of partners</li> <li>▪ Participation in the application seminar and PPP presentation for the application seminar.</li> </ul>	
<b>Estimated number of senior expert days</b>	<b>9</b>

<b>Work Package 5: Assessment of the Applications received and the Selection of the UAEU Partnership Members</b>	
<b>Timeframe</b>	<b>app 2 months</b>
<p>The number of applications received may vary. Thus, it is gradually increasing with a maximum of 18 Senior Expert Days:</p> <p>20 Applications (up to 8 days)  50 applications (up to 12 days)  90 applications (up to 18 days)</p>	
<p>The expert will analyse the proposals and rank them based on the selection criteria and evaluation grid. The expert will establish a list with all contact details and one list with contact details of shortlisted candidates.</p> <p>The expert will elaborate an assessment report for the UAEU governance structure (UDG members) with a short-written justification per partner. The report will be presented during the UATPG and UDG meeting. Comments and adjustments will be included if necessary.</p>	

The expert will prepare a PPP comprising the explanation of the selection criteria, a short data analysis on the call results, an applicants' overview and the proposal for a potential partnership composition based on the evaluation grid and results of the expert analysis.

The expert will present the results and the reasons for the proposed selection during the UATPG (online), UDG (online or in-person) and DGUM (in-person) meetings.

**Deliverables:**

- 1 list of all applicants with contact details (by help of EU-Survey statistics)
- 1 list of shortlisted applicants with contact details.
- 1 assessment report
- PPT presentation for UATPG, UDG and DGUM meetings on the results of the call
- Participation in UATPG (online) 1 UDG and 1 DGUM meeting.

**Estimated number of senior expert days**

**8 up to 18**

Please note: The scope of tasks under section 3.1. is still indicative, as some aspects of the UAEU TP preparation is part of a dynamic process. Minor changes on the task description and the related number of expert days will be finally agreed between the EUI-Ps and the selected expert with the final service contract in November 2024.

### **3.2. AD-HOC EXPERTISE TO SUPPORT THE URBAN AGENDA FOR THE EU**

The EUI offers several ad-hoc support services under the Urban Agenda for the EU and Intergovernmental Cooperation. This part of the Call invites experts with profound knowledge on the UAEU for the EUI Pool of Experts. Once selected to the Pool, experts can be directly appointed or express their interested upon request to perform activities under the following tasks:

- a) Provision of expertise service (external experts) for UAEU Thematic Partnerships
- b) General ad-hoc support focused on the Urban Agenda for the EU (as a whole) and Intergovernmental Cooperation

### a) Provision of external expertise service for the UAEU Thematic Partnerships

Provision of expertise support service is one of several support services<sup>2</sup> provided by EUI-PS. EUI-PS will, select, contract, and assign external experts to provide specific knowledge, know-how and /or expertise and produce specific outputs for the development and implementation of the actions of the Thematic Partnerships established after 2021. This may cover cover the following and topics:

- Greening Cities
- Sustainable Tourism
- Cities of Equality
- Food
- Water Sensitive City
- Building Decarbonisation: Integrated Renovation Programmes and Local Heating and Cooling Plans
- Skills for Urban Transition
- The Compact Cities – Sustainable urban planning and sprawl mitigation

Such expertise can be contracted when knowledge, know-how and/or expertise are not already available inside the UAEU Thematic Partnership, the EUI PS or when there is not sufficient capacity to achieve a certain goals. Such expertise can be used, for example to develop, research, analyses recommendations on policy papers and moderated conferences or workshops. The external expertise service will not cover the writing the Action Plan itself since this is at the core of the work of the Thematic Partnership. In general the Provision of expertise can be requested for three (3) aims:

- to support the development and selection of individual actions, *before* the Action Plan is finalised and approved.
- to support the development of the entire Action Plan, *before* the Action Plan is finalised and approved. (But cannot be offered for the writing of the Action Plan in itself. This is a key task of the UAEU Partnership.)
- to support the implementation of individual actions or the Action Plan, *after* the Action Plan is finalised and approved.

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<sup>2</sup> <https://www.urbanagenda.urban-initiative.eu/urban-agenda-eu#:~:text=-.EUI%20Support%20Services%20to%20the%20Partnerships,-One%20of%20the>

At the moment of writing the current document, each Thematic Partnership (or OFC) can benefit from *up to 70 expert days*<sup>3</sup> per year (for the 3 years of the UAEU Partnerships<sup>4</sup>) depending on needs formulated for the development and implementation of actions.

**b) General ad-hoc support focused on the Urban Agenda for the EU (as a whole) and Intergovernmental Cooperation**

Additionally, EUI can provide future ad-hoc support for the implementation of the UAEU and support in the Intergovernmental Cooperation. This may cover (non-exhaustive list):

- Providing expertise support for the development and implementation of an OFC (Other Forms of Cooperation).
- Overall support in the implementation of the Urban Agenda (e.g. surveys, studies, moderation, conferences, scientific story telling etc...)
- Further ad-hoc expertise on Intergovernmental Cooperation if requested

Please note, that in line with Article IV, 21 of the Pact of Amsterdam stating that “participation in UAEU partnerships is voluntary”:

- the employees of the organisations which are members of one of the UAEU Partnerships
- the experts/consultants representing one of the organisations which are members in one of the UAEU partnership(s)

are **not** eligible to provide work for the partnerships(s) in which they are a member, but **are** eligible to provide work for the other partnership(s).

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<sup>3</sup> These can be used based on the existing EUI categories of expertise and their corresponding rate.

<sup>4</sup> Calculated from the date of the meeting in which the Partnership was approved by the DGUM.



### **3.3. EXPERTISE TO SUPPORT THE IMPLEMENTATION OF EUI KNOWLEDGE ACTIVITIES**

This part of the call invites experts with profound knowledge on sustainable urban development and related thematic and operational themes to join the EUI expert pool. Once selected in the EUI pool, experts undergo a direct appointment or a light selection process at EUI's discretion for future incoming requests in the following areas:

1. External Expertise Service for policy labs
2. External expertise service for focused policy labs
3. External expertise service for policy briefs
4. External expertise service for editorial tasks

In addition to these areas, experts may be called upon to provide expertise in support of other emerging needs related to the implementation of the EUI Knowledge Management Strategy. Please note that the implementation of the EUI Knowledge Management Strategy and related activities are not limited to the experts included in the EUI pool of experts. In order to achieve the expected results, the EUI PS reserves the right to invite tenders from specialised companies when and if it deems it appropriate/relevant.

Expertise is sought in all areas related to Sustainable Urban Development (SUD). In addition, there is a potential focused need for experts in the following thematic areas:

- Climate adaptation
- Energy transition
- Water management
- Urban Mobility
- Job creation and entrepreneurship
- Circular economy
- Housing
- Urban regeneration
- Social inclusion

**Task Group 3.3.1.: External expertise service for policy labs**

**Timeframe**

**Max 12 months** from the kick-off meeting with EUI to the production of the final output and dissemination material.

In the frame of policy labs, the provision of expertise can be requested for:

- Mapping of EUI practices and beyond (when relevant) on the topic and defining the research questions
- Capturing the existing knowledge, conducting hearings, interviews and consultations
- Analysing inputs and drawing common conclusions
- Designing, preparing and moderating events
- Briefing event’s speakers
- Drafting articles
- Producing the final output, report and recommendations
- Liaising with the EUI PS and other stakeholders involved in the activity
- Coordinating the delivery of dissemination materials, in relation to EUI providers
- Contributing to dissemination

This list is not exhaustive; additional tasks may be requested depending on needs.

**Deliverables:**

- inception report
- questions list for hearings
- detailed event agenda
- description of cross-cutting questions
- briefing note for speakers
- article on the early findings of the study
- script for podcast
- briefing for graphic designers
- report

The expert may be appointed as lead expert, coordinating the work of a group of experts, or as ad-hoc expert, being part of a group of experts. EUI PS accords the role of lead or ad-hoc as it sees fit.

**Estimated number of senior expert days**

**10 to 40 days.** More days may be allocated to lead experts

### Task Group 3.3.2: External Expertise Service for focused policy labs

<b>Timeframe</b>	<b>max 8 to 6 months</b> from the kick-off meeting with EUI to the production of the final output after the capitalisation event
<p>In the framework of focused policy labs, the provision of expertise can be requested for:</p> <ul style="list-style-type: none"> <li>▪ Mapping EUI practices and beyond (when relevant) on the topic and defining the cross-cutting questions</li> <li>▪ Coordinating and/or contributing to the content of the event</li> <li>▪ Capturing the existing knowledge during dedicated event/workshop</li> <li>▪ Designing, preparing and moderating the event</li> <li>▪ briefing event speakers</li> <li>▪ planning and organising necessary meetings</li> <li>▪ liaising with the EUI PS and other stakeholders involved in the activity</li> <li>▪ producing the final output, including findings, recommendations, and any other necessary documentation</li> <li>▪ drafting articles</li> <li>▪ contributing to dissemination.</li> </ul> <p>This list is not exhaustive; additional tasks can be requested depending on needs.</p>	
<p><b>Indicative list of deliverables:</b></p> <ul style="list-style-type: none"> <li>▪ Detailed event agenda</li> <li>▪ Session moderation scripts</li> <li>▪ Briefing note for speakers</li> <li>▪ Final output</li> </ul> <p>The expert may be appointed as lead expert, coordinating the work of a group of experts, or as ad-hoc expert, being part of a group of experts. EUI PS accords the role of lead or ad-hoc as it sees fit.</p>	
<b>Estimated number of senior expert days</b>	<b>4 to 15 days.</b> More days may be allocated to lead experts.

### Task Group 3.3.3: External expertise service for policy briefs

#### Timeframe

**max 2 to 4 months** from the kick-off meeting with EUI to the finalisation of the policy brief

In the context of policy briefs, the provision of expertise may be requested for:

- conducting comprehensive research and analysis
- synthesising complex information into clear, concise and accessible briefs for policymakers
- identifying and engaging with relevant experts and stakeholders to gather insights and validate findings
- drafting and reviewing policy briefs to ensure accuracy, clarity and relevance
- coordinating the review and approval process with EUI PS and relevant stakeholders,
- designing and formatting policy briefs for effective presentation and dissemination
- organising workshops or consultations to discuss findings and recommendations with stakeholders

This list is not exhaustive; additional tasks can be requested depending on needs.

#### Indicative list of deliverables:

- research and analysis report
- summaries of expert and stakeholder consultations
- finalised policy briefs
- workshop/consultation detailed agendas and summaries

The expert may be appointed as lead expert, coordinating the work of a group of experts, or as ad-hoc expert, being part of a group of experts. EUI PS accords the role of lead or ad-hoc as it sees fit.

#### Estimated number of senior expert days

**3 to 10 days.** More days may be allocated to lead experts.

### Task Group 3.3.4: External expertise service for editorial projects

<b>Timeframe</b>	<b>1 to 2 months</b> from the initial kick-off meeting to the delivery of the final outputs and dissemination materials
<p>In the context of editorial projects, the provision of expertise may be requested to:</p> <ul style="list-style-type: none"> <li>▪ researching on relevant topics, themes, and trends within the field</li> <li>▪ conducting research to gather background information and data</li> <li>▪ interviewing stakeholders</li> <li>▪ reviewing existing literature, reports, and other content</li> <li>▪ drafting articles, reports, and other forms of written content</li> <li>▪ creating scripts for multimedia content, including videos, podcasts, and webinars</li> <li>▪ producing supporting materials such as infographics and slides</li> <li>▪ liaising with EUI providers</li> </ul> <p>This list is not exhaustive, and additional tasks may be requested based on specific editorial needs.</p>	
<b>Indicative list of deliverables:</b> <ul style="list-style-type: none"> <li>▪ list of key questions for interviews and consultations</li> <li>▪ draft articles or preliminary findings</li> <li>▪ scripts for multimedia content</li> <li>▪ briefing documents for graphic designers</li> </ul>	
<b>Estimated number of senior expert days</b>	<b>5 to 10 days</b> per project.

## 4. APPLICATION AND SELECTION PROCEDURE

### 4.1. APPLICATION

Candidates are invited to apply to the present call for experts by respecting the procedure indicated in this document and the [\[LINK TO THE APPLICATION FORM\]](#).

As EUI is indirectly managed by the European Commission, which involves numerous actors and processes, it is imperative for the experts **to be cooperative and flexible** in the implementation of the contract, report regularly and concisely about their activities, and to accommodate for the changes naturally emerging within the general framework. One applicant is allowed to apply:

- for only one specific task
- or
- for **as many tasks they consider themselves to be suitable for**. In this case they will be required to prove having sufficient capacity to implement more than one group of tasks in parallel.

The application form will allow the EUI Permanent Secretariat to assess the candidates' eligibility and suitability for the Experts role(s) they applied for.

in addition to the above-mentioned elements, candidates are requested to:

1. Indicate the specific field(s) of expertise they would like to be considered for.
2. Indicate if they prefer and have the capacity to implement the services for one or several tasks in parallel.
3. Describe the main experiences, skills, knowledge which individual provider would bring to the role(s) and provide evidence of their experience while respecting the word limit in each question box.

In addition to the application form, all applicants are required to submit a CV of maximum 5 A4 pages preferably in Europass format, maximum 1 MB size, detailing your qualifications and work experience. The duration in months along with the start date and end date must be provided for any previous relevant employments. Examples of previous work can be included as hyperlinks or annexes to your CV in the same single document to be uploaded on the application platform. 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.

Applications must be submitted to the EUI Permanent Secretariat by the **deadline indicated in the timeline table below via the online application** form on the EUI website.

## 4.2. SELECTION PROCEDURE

The selection of applications for the experts' roles will be performed by the EUI PS and its external service provider. The selection procedure will be undertaken in two stages:

- (1) Eligibility assessment
- (2) Quality assessment

### Overall EUI criteria

#### (1) Eligibility assessment

During the eligibility assessment, in order to be selected for the expert role, the following criteria will apply:

- Fluency in English (written and spoken, C1 level certificate<sup>[1]</sup> required from non-native speakers)
- University degree plus the minimum number of years of relevant work experience in topics related to Sustainable Urban Development (SUD) within EU Cohesion Policy (see Annex SUD-related themes in the Courtesy Document), specifically:
  - Doctoral degree (PhD) and at least 7 years of relevant work experience<sup>[2]</sup>
  - 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

#### (2) Qualitative assessment

For the quality evaluation the following criteria will be applied:

- Knowledge on and experience regarding the specific tasks of the contract
- Knowledge of Sustainable Urban Development and related thematic areas

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<sup>[1]</sup> 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.

<sup>[2]</sup> <sup>[2]</sup> Years of relevant experience are calculated starting from the date of obtaining the highest degree, whether it is a Master's or a Bachelor's degree.

- Experience in project management and ability to deliver high-quality outputs within the specified timeframe, managing projects effectively from inception to completion.
- Research and analytical skills: strong ability to conduct comprehensive research and analysis, proficiency in synthesizing complex information into actionable insights

Quality evaluation will be carried out by EUI PS for candidates listed as eligible. A shortlist of the candidates with the best applications will be invited for an interview. 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 for those applicants owning a proof of language it is highly recommended that they upload it in the application form. The proof of English level must be provided according to the indicative timeline.

Following the interviews with shortlisted candidates, the EUI Permanent Secretariat (EUI PS) will then select individuals for the role of Experts. The EUI PS is supported in this process by an external contractor.

#### **Specific assessment criteria for applicants on tasks under section 3.1.**

- Knowledge and experience regarding urban/spatial planning and research methodologies with a specific focus on urban sprawl mitigation, qualitative urban density including social and environmental aspects and compact transport infrastructure. Additionally:
  - evidence of at least three relevant projects the applicant has implemented
  - evidence of at least three relevant own scientific publications
- Knowledge and/or experience related to the Urban Agenda for the EU.
- Knowledge about relevant EU policy and/or EU legislative processes in the context of urban development and compact cities.
- Knowledge about moderation and facilitation.

#### **Specific Assessment Criteria for applicants on tasks under section 3.2.**

- Knowledge and/or experience about the Urban Agenda for the EU and/or EU Intergovernmental Processes on urban matters.
- Knowledge about one or several of the following topics with reference the EU-policy context
  - Greening Cities



- Sustainable Tourism
  - Cities of Equality
  - Food
  - Water Sensitive City
  - Building Decarbonisation: Integrated Renovation Programmes and Local Heating and Cooling Plans
  - Skills for Urban Transition
  - The Compact Cities – Sustainable urban planning and sprawl mitigation
- Knowledge and/or experience in moderation/facilitation.
  - Knowledge and experience in working in a multi-level and international environment.
  - Experience in working with cities and local authorities in the context of regional and local governance.

**Specific Assessment Criteria for applicants on tasks under section 3.3.**

- Knowledge and/or experience about knowledge capture and capitalisation
- Knowledge about Cohesion policy, its urban dimension and other EU urban related initiatives
- Experience in working with cities and local authorities
- Experience in writing clear and concise articles or written outputs tailored for an audience of urban practitioners
- Knowledge and/or experience in collective intelligence approaches to design knowledge events and activities

**4.3. CALENDAR**

The indicative timeline for this work order is detailed below. **The applicants** are required to **ensure their availability for an interview**, on those indicative dates – all of which will be organised online.

Launch of the Call	1 August 2024
Closing date for receipt of applications	30 September 2024 (14:00 CET)
Eligibility assessment and provision of: <ul style="list-style-type: none"> <li>▪ list of eligible candidates to EUI PS with evidence of C1 level English language proficiency</li> <li>▪ List of eligible candidates with the need for English language testing</li> </ul>	1 October to 8 October 2024

Quality assessment and shortlisting of candidates	18 October 2024
Shortlisted candidates are informed and invited to: <ul style="list-style-type: none"> <li>▪ choose a date/time for interview</li> <li>▪ Take the English language test (if needed)</li> </ul>	21 October 2024
If needed, EN tests take place	21 – 31 October
For candidates applied <u>for section 3.1. (Ex-Ante Assessment, <b>online</b> interviews will take place</u>	23 – 24 October 2024 <i>Information of the selection on 25 October</i>
Interviews for all candidates applied only for the ad-hoc expert pool	week of the 4th of November 2024
Contracting and start of the work	<ul style="list-style-type: none"> <li>▪ For UAEU Ex-Ante assessment: 1 Nov 2024 (envisaged)</li> <li>▪ For tasks under sections 3.2 and 3.3, no immediate contracting is foreseen. Contracting and work for these tasks are expected to take place mainly in 2025. Therefore, there will be no immediate contracting, but selected candidates will be integrated into the pool of experts for possible future tasks and assignments. A specific call for expressions of interest; or direct appointments will be used to select experts from the EUI pool on the basis of specific work requirements.</li> </ul>

An individual email will be sent to the short-listed candidates. Candidates will be expected to confirm their participation to interviews by email return. Due to the large amount of applications expected, if candidates have not heard anything by 21 October 2024 they should consider they have not been shortlisted. We will not be able to provide further individual feedback at that stage.

## **5. CONTRACTUAL DETAILS**

### **5.1. CONTRACTUAL MANAGEMENT**

The EUI external service provider tasked with assessing the eligibility of received applications will also handle the contractual management of selected experts. This includes issuing a dedicated scope of work and related work orders, as well as signing contracts between the external service provider and each chosen expert.

Selected experts who are part of the pool but have not yet been contracted for a specific mission will enter into a contract with the external service provider.

The Permanent Secretariat will oversee and support the activities of the external service provider. Quality control of the activities and deliverables of the expert is solely the responsibility of the Permanent Secretariat.

### **5.2. 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.