Call for IA Experts

supporting European Urban Initiative
– Innovative Actions projects selected
in the framework of the 2nd Call for Proposals

Terms of Reference

16 September – 17 October 2024

Contents

LIST OF ABBREVIATIONS

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

1. INTRODUCTION TO EUI – INNOVATIVE ACTIONS (EUI-IA)

1.1 Innovative Actions

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

➢ **Funding for testing** (piloting) innovative solutions **and for preparation 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 propose 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 2nd EUI-IA Call for Proposals

The second EUI-IA Call for Proposals was dedicated to three topics: **Greening cities, Sustainable tourism and Harnessing talent in shrinking cities.**

After a competitive selection process, **22 projects** have been selected, not only for their **innovativeness** but also for their **transfer potential** to other EU cities and their capacity in establishing solid local partnerships.

Supported by a total ERDF budget of EUR 98 million, the selected urban authorities will have the opportunity to experiment creative, innovative and sustainable solutions.

The selected projects are:
- GfW - City of Amsterdam (Netherlands)
- Cooling Havens - City of Athens (Greece)

- TOP SEC - Barcelona Metropolitan Area (Spain)
- B-CONNECT - City of Bistrita (Romania)
- TALEA - Municipality of Bologna (Italy)
- Blue4Green - City of Bruges (Belgium)
- MAG-NET - City of Celje (Slovenia)
- COIMBRA ST LLM - City of Coimbra (Portugal)
- CULTIGEN - City of Copenhagen (Denmark)
- GreCO - City of Elliniko - Argyroupoli (Greece)
- REWILD - City of Ghent (Belgium)
- CARE-GET - City of Haskovo (Bulgaria)
- EcoZani - City of Kozani (Greece)
- SCT HUB - City of Krakow (Poland)
- GOCCIA - City of Milan (Italy)
- EPIC - City of Prato (Italy)
- FOOTPRINTS - City of Ravenna (Italy)
- AQUAGREEN - Romagna Faentina Union (Italy)
- Greening Without Borders - City of Rotterdam (Netherlands)
- SPACE 4 TALENTS - City of Stalowa Wola (Poland)
- ReGreenX - City of Szeged (Hungary)
- Zentropy MICE - City of Valencia (Spain)

More information about the projects is available of the EUI website here.

Candidates will be asked if they are interested in supporting one or more projects.

2.   DEFINITION OF THE NEED

The Permanent Secretariat aims to select **up to 22 Experts** who will support and follow EUI-IA Call 2 projects.

To share and disseminate the thematic and operational knowledge generated by EUI-IA projects, it is essential to be able to **capture, analyse and disseminate the main findings, lessons learnt and experiences** coming from the different "urban labs" that the EUI-IA is supporting across Europe.

It is in this perspective, IA Experts will be asked to perform the following tasks:

A. Advice and Guidance (ongoing and ad-hoc) on strategic and operational aspects of the project, related to the policy area addressed by the project, its innovative solution, and its transfer.

B. Knowledge Capture and Dissemination at project-level: collect data and evidence from project, produce and disseminate accessible content to ensure the knowledge legacy of the EUI-IA project.

C. Collaboration with other IA Experts and collective work within the community of EUI Experts.

D. Additional Activities (upon further individual agreement between the IA Expert and the Permanent Secretariat).

More precisely, under Advice and Guidance (task A), IA Experts are expected to:

▷ **Propose strategic advice**: IA Experts are expected to propose **strategic and thematic** recommendations and guidance for project implementation.

▷ **Propose operational guidance**: IA Experts should support in exploring how to **best implement the key Sustainable Urban Development principles** in the project, such as enhancing governance models, ensuring meaningful community participation, and identifying areas for an integrated approach.

▷ **Research and policy watch**: In addition, IA Experts are tasked with monitoring project-related themes and suggesting relevant academic or non-academic articles/studies or similar practices from Europe that may serve as inspiration for the project.

▷ **Additionally, support transfer activities**: Although each IA project will be additionally supported by the Transfer Expert and support for transfer component of the IA project will be a primary focus area of the said Expert, certain involvement of the IA Experts is expected, both in terms of support for the project and collaboration with the Transfer Expert.

Under Knowledge Capture and Dissemination (Task B), IA Experts are expected to:

▷ **Collect data, capture and disseminate lessons learnt**: IA Experts will collect data, evidence, and lessons gleaned from projects, including their transfer components. They will then use this information to produce accessible and high-quality content (outputs), ensuring the ensuring legacy of project knowledge.

▷ **Propose dissemination activities**: Another vital role is to propose relevant activities and events for disseminating the project's work at the European Union level, ensuring its visibility and impact.

▷ **Contribution to capitalisation activities**: IA Experts will document the project's progress and lessons learnt comprehensively through outputs (see above), offering regular updates to the Permanent Secretariat. These updates serve as valuable inputs for subsequent capitalisation activities.

▷ **Assist in final communication and dissemination**: If requested by the project, IA Experts can help with the design and delivery of the final communication and dissemination activity.

Under Collaboration with other IA Experts and collective work within the community of EUI Experts (Task C), following tasks are foreseen:

▷ **Collaboration between the IA Expert and the Transfer Expert supporting the same IA project** – online or in-person exchange between the Experts supporting given IA project. Collaboration should be dedicated to: knowledge exchange regarding the IA project implementation, development of the innovative solution and transferability of the IA project.

- ▷ **Participation in annual online meetings of IA Experts with the Permanent Secretariat** (meetings dedicated to networking, exchange of experiences, capturing lessons learnt around EUI Experts work and discussing changes for the future).

- ▷ **Other forms of individual and collective exchange** – the Permanent Secretariat might propose other forms of individual or collective online and/or in-person exchanges to facilitate the IA Expert work and the overall quality of expert support provided for the IA projects. For example, it is foreseen that on a regular basis (annually, or bi-annually) in-person meetings of IA projects, EUI Experts and the Permanent Secretariat will be organised to facilitate knowledge exchange and peer learning.

Under Additional Activities (Task D), IA Experts might be invited to contribute to other EUI capacity building or knowledge and dissemination activities.

2.1   Task A – Advice and Guidance

Specifically, within the Advice and Guidance Task, the involvement of IA Experts is expected to enhance the capabilities of MUA, enabling them to deliver high-quality EUI-IA projects. IA Experts are expected to visit cities during implementation (at least once a year) and maintain regular communication with the MUA. Each IA Expert will offer urban authorities both strategic and operational guidance. The MUA requests advice and guidance on specific aspects of their implementation, it is a bottom-up demand.

At the **strategic level**, IA Experts will provide insights and advice regarding the project's main theme / policy area, and its innovative elements, with a particular focus on the project's objectives, policy domains, expected outcomes, results, and target beneficiaries.

At the **operational level**, IA Experts will provide MUA with guidance on the key steps and challenges in implementing the innovative solution(s). These operational challenges[1] may include, but are not limited to:

- ▷ Strategy
- ▷ Governance
- ▷ Participation and communication
- ▷ Resource allocation and funding
- ▷ Data management and evaluation
- ▷ Scaling up and transfer
- ▷ Territorial focus

In both strategic and operational guidance, the support offered by IA Experts will draw from academic and non-academic research, experience, best practices, and case studies from Europe and beyond. They will provide this advice and recommendations through on-site visits to projects and regular communication with project managers and other key stakeholders at the local level.

Additionally, IA Experts will be asked to contribute to the **main final output of the project implementation in terms of transfer and knowledge dissemination: EUI - Innovative Solution Model**. The Model is a final document prepared by the MUA and focused on the transferability and scaling up of the

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[1] https://portico.urban-initiative.eu/operational-topics

tested innovative solution to allow others (all interested EU cities) to learn about the findings of the experimentation and receive some guidance on how to approach replication. The EUI - Innovative Solution Model will be publicly available on Portico and EUI webpage as a legacy of the EUI-IA project implementation.

This task includes understanding the project, maintaining regular contacts to stay informed of the project's development, progress and challenges. This can involve activities like site visits (at least annually), online communication, interviews, etc. Additionally, it contributes to prepare expert's outputs, ensuring the content is robust and closely aligned with the project.

Activity	Expected date of delivery	Maximum number of days per Action
Advice and guidance for the MUA (including potential policy/scientific watch and support for dissemination activities)	December 2024 to May 2028	Up to 14 days
Site visits (including mandatory first visit) and online meetings	December 2024 to May 2028	Up to 11 days
Transfer Site Visits organised by MUA for Transfer Partners (Opening Site Visit, Deep Dive Site Visit and Closing Site Visit)	February 2024 – May 2028	Up to 9 days
Contribution to preparations of the EUI – Innovative Solution Model	May 2028	2 days
[only in case of in case of IA project extension] Additional advice and guidance for the MUA	June 2028 until maximum November 2028	Up to 2 days

2.2   Task B – Knowledge Capture and Dissemination.

IA Experts play a vital role in developing **content and outputs that capture and disseminate lessons learned and best practices to a broader audience**. This involves capturing results and lessons learnt from the project, with a specific focus on how urban authorities and local key stakeholders have navigated the implementation process. As part of the knowledge capture effort, IA Experts are tasked with producing several key outputs:

▷   **Analytical Articles**

IA Experts will be producing a series of Analytical Articles. They serve as means to observe the **project's progress towards planned results** linking it to **Sustainable Urban Development** principles, and to

broader urban trends and challenges[2] relevant for the policy area addressed by the project. The focus of the Analytical Articles is to offer a brief insight into the project life, pinpointing the most interesting moments, achievements, and challenges. The Analytical Articles provide the necessary context as well, including **geographical, social, and policy details, to enhance the reader's understanding of the project's background**.

In this sense, the articles represent a primary source for gaining insights into the project's and are intended for a broad audience of external readers, encouraging them to also explore other more in-depth analytical reflections prepared by IA Experts in in the Urban Diary and Zoom-in reports. IA Experts are therefore encouraged to establish connections with other outputs.

The Analytical Articles will be published on the EUI website/Portico and cater to a wide audience. The timeline of preparing these articles will be determined collaboratively with the Permanent Secretariat at the start of the contractual relationship, with an estimated frequency of two articles per year of project implementation.

The **format of the content** in these analytical articles can vary, ranging from traditional essays (between 800 to 1500 words or 1,5 and 3 pages each) and interviews to more accessible listicles, "5-minutes read", podcasts or videos, depending on the chosen approach and Expert skills.

Additionally, the Permanent Secretariat may request IA Experts to contribute to **thematic series** of articles coordinated by the Permanent Secretariat.

> ⊳ Urban Diary - Insights from the Field

The second output created by IA Experts consists of a series of yearly written accounts combined in the Urban Diary, which aim to provide valuable **insights from the implementation**. Each IA Expert writes one chapter per year (around 2500 word or 5 pages each), contributing to the overall project's Diary. Throughout the project's duration, this Diary serve as a regular documentation of the **innovative solution's implementation** and the **challenges faced, hence "Insights from the Field"**.

The Urban Diary aim to offer a comprehensive understanding of the Innovative Actions project and its realisation, with a strong focus on the innovative element(s) of the project. The Diary should also highlight **challenges, solutions, and recommendations for practitioners** The yearly chapters focus on the project's progress and challenges, offering **analytical insights rather than mere status reports**. The expert should ensure the **continuity** across different chapters to track the project's evolution.

IA Experts analyse the steps taken by project partners to address challenges, identify **learning points** for urban stakeholders, and reflect on the project's progress. Each entry takes an analytical approach, emphasising the project's innovative elements, and provides insights into overcoming specific barriers and identifying alternative solutions. The Urban Diary also capture the project's **continuous learning curve** by documenting deviations and evolutions.

The IA Expert's written accounts are published on the EUI website and Portico, making them accessible to a wide audience, including decision-makers, urban professionals, and the general public, ensuring high visibility. The Expert gains knowledge through on-site project visits, engaging in in-situ exchanges with urban authorities and partners, and reviewing project documentation.

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[2] https://portico.urban-initiative.eu/urban-themes

➤ **Zoom-in - Learning from Practice**

The third output of the knowledge capture task is the Zoom-in which offer a **deep dive into a particular aspect of the project**. Its primary purpose is to enrich the knowledge generated by the project, especially regarding the **implementation in a real urban context**. These Zoom-ins will be produced once a year.

As a practical resource ("Learning from practice"), the output is **tailored for a specific and informed audience** that seeks a more **profound understanding** of the innovative action project.

Zoom-ins are designed to provide an in-depth analysis of a key aspect of the innovative solution, underlining its significance for urban practitioners and decision-makers. They should concentrate on a specific operational or thematic challenge that the innovative solution within the project aims to tackle and propose a comprehensive analysis of what components of the solution were most effective, substantiated by project results, evidence, reports, and data.

These Zoom-ins are expected to be from 1000 to 2000 words or 2 to 4 pages. However, they can also take various forms, including podcasts or videos, offering diverse ways for the audience to engage with the content.

➤ **Narrative inputs**

Once a year, IA Experts will be asked to provide feedback to the Permanent Secretariat on the implementation of the project from their perspective. This content will help the Permanent Secretariat in better monitoring and supporting the projects, and be an independent complement to project's reporting obligations.

➤ **Additional Knowledge Capture and Dissemination activities**

The insights and lessons gleaned from the execution of EUI-IA projects have substantial value for European policymakers and practitioners facing similar challenges and aiming to test innovative solutions. Therefore, it is important that this knowledge is not only acquired but also widely disseminated at both European and global levels.

The EUI has established partnerships with relevant European and national institutions and organisations specialising in knowledge management and dissemination for Sustainable Urban Development, such as URBACT, Eurocities, Energy Cities, the European Committee of Regions, and CERM, among others.

Building upon the experiences gained from the 2014-2020 programming period, EUI knowledge initiatives are focused on capturing, consolidating, and facilitating the adoption of the outputs and results generated across various areas of the Initiative. The capitalisation efforts will specifically concentrate on the outputs and results of EUI-IA, among others. These activities will assume various forms through dedicated policy labs, including Knowledge for Policy Labs, Focused Policy Labs, and Thematic Reviews for Policy.

IA Experts may also be invited to contribute to these activities. Please note that invitation to contribute to EUI's Knowledge Sharing and Dissemination activities will always take place at the initiative of the

Permanent Secretariat and number of days allocated for these tasks will follow mutual agreement between the IA Expert and the Permanent Secretariat based on the exact scope of expected work.

At the same time, MUA and IA Experts should use their **existing networks and connections** to disseminate the project and share the knowledge that has been acquired and documented. IA Experts will play a pivotal role in assisting EUI-IA projects in their dissemination. This entails **mapping relevant conferences and events** organised by EU or national institutions and organisations and **supporting urban authorities to attend** those and showcase their project. Furthermore, IA Experts are encouraged to extend the reach of dissemination activities by tapping into their **own professional and academic networks**.

Outputs	Expected date of delivery	Number of days
4 chapters of Urban Diary	1 per year, exact delivery dates to be agreed upon with the MUA and the Permanent Secretariat	3 days per chapter of the Diary (12 days in total)
7 Analytical Articles	1 per 6 months, exact delivery dates to be agreed upon with the MUA and the Permanent Secretariat	1 day per Analytical Article (7 days in total)
3 Zoom-in	1 per year (during the 3 first years), exact delivery dates to be agreed upon with the MUA and the Permanent Secretariat	2 days per Zoom-in (6 days in total)
4 Narrative inputs	1 per year	1 day per Narrative input (4 days in total)
Other on-demand knowledge sharing, knowledge exchanges and dissemination activities	Ongoing during the project implementation at the request of the Permanent Secretariat	Up to 4 days

2.3   Task C – Community of Experts.

EUI fosters collaboration, learning, and knowledge exchange among IA Experts, Transfer Experts, and the Permanent Secretariat through online and in-person meetings, focusing on the implementation and transferability of innovative solutions in IA projects, with specific tasks including regular communication, annual networking meetings, and potential additional exchanges.

| Activity	Expected date of delivery	Maximum number of days per Activity
Collaboration between IA Expert and Transfer Expert supporting the same IA project	throughout the IA project implementation period (3.5 years)	Up to 4 days in total
Participation in annual online IA Experts meetings	throughout the IA project implementation period (3.5 years)	Up to 2 days in total
Other forms of individual and collective exchange (for example, in-person collective meetings of IA projects, IA Experts and the Permanent Secretariat)	throughout the IA project implementation period (3.5 years)	to be determined on an ad-hoc basis

2.4   Task D – Additional Activities.

Under Additional Activities (Task D), IA Experts might be invited to contribute to other EUI capacity building or knowledge and dissemination activities. These additional tasks might take different forms. The IA Expert might be proposed to contribute to thematic series of outputs coordinated by the Permanent Secretariat, facilitating in-person workshops, preparing studies dedicated to a specific topic, speaking at an event for the cities, moderating online sessions, etc. The IA Expert involvement in these activities will always follow prior acceptance of the collaboration offer or being selected for the assignment via internal (within the Pool of Experts) recruitment process, and agreement regarding number of days foreseen for the task.

3.   INDICATIVE TIMEFRAME FOR SCOPE OF WORK

IA Experts contracts will be linked to the **Project Implementation Phase**. The EUI-IA project lifecycle comprises four phases:

1. **Project Preparation**: This phase encompasses activities related to the development of the project application and concludes with EUI Authorities' approval for project funding.
2. **Initiation Phase**: This phase, lasting 6 months, begins after the project receives official approval. It focuses on readiness checks, project management activities, and ensures a smooth project launch.
3. **Project Implementation Phase**: This is the core phase, spanning 3.5 years, starting after the Initiation Phase and extending until the approved project implementation end date. It includes various work packages.

- "Horizontal" Work Packages (e.g., Project Management, Monitoring and Evaluation, Communication, and Capitalisation) run throughout the Implementation phase, with a special focus on summarising, evaluating, disseminating project results, and preparing for the project's legacy during the final 6 months.

- Thematic Work Packages can last up to a maximum of **3 years** and should conclude 6 months before the Implementation phase's end to allow for proper evaluation, transfer activities, and capitalisation of project achievements.

- Transfer Work Package begins no later than 12 months after the project start date and continues until the end of the Implementation phase.

4. **Administrative Closure Phase**: This 3-month phase follows the Implementation phase and involves administrative activities to conclude the project, including validation of narrative and financial reporting documents. EUI-IA project representatives are expected to participate in knowledge capitalisation and dissemination activities initiated by the Permanent Secretariat during this phase.

PROJECT PHASES
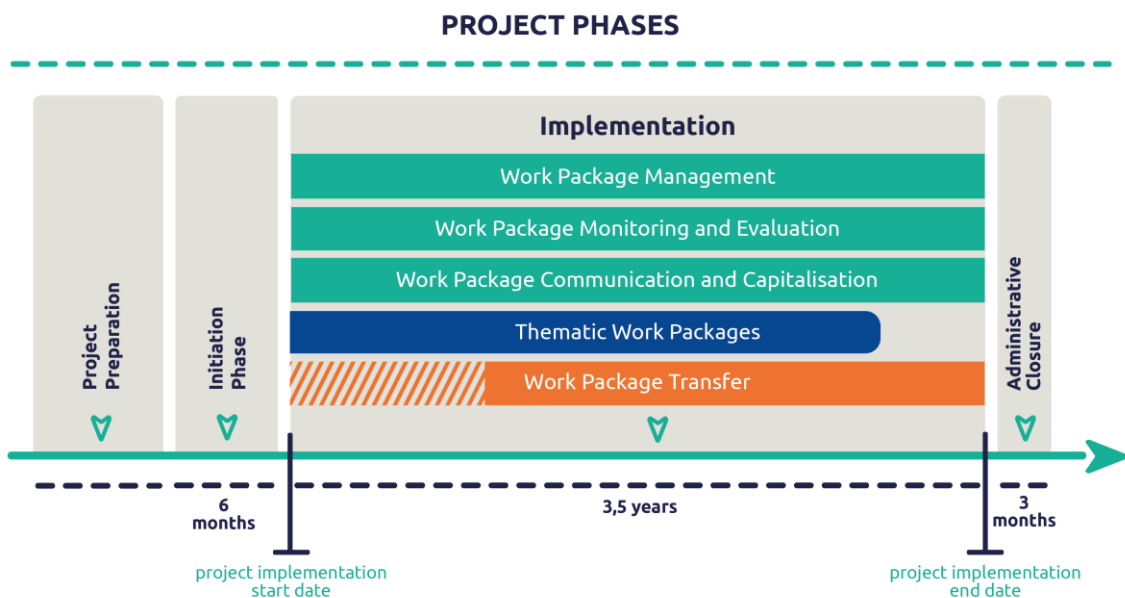
Taking above into account, **IA Experts' contracts will be signed from 01/12/2024 to 30/11/2028** (including potential extension if approved for the project).

Experts and MUA will need to agree at the start of their cooperation on a workplan with an indicative timeframe and indicative topics for each requested output.

<u>Task A and B</u>

Project's life timeframe	Expected tasks and outputs	Indicative number of days per year
Year 1	- 2 Analytical Articles (max 2 days) - 1 Zoom-in (max 2 days) - 1 chapter of Urban Diary (max 3 days) - 1 Narrative input (max 1 day) - Advice and guidance for the MUA (to be agreed between the Expert and the MUA within the total limit of 14 days) - Site visits and on-line meetings (to be agreed between the Expert and the MUA within the total limit of 11 days) - Transfer Opening Site Visit (max 3 days; participation recommended but not compulsory) - Other on-demand knowledge sharing, knowledge exchanges and dissemination activities (at the request of the PS, within the limit of 4 days)	Around 19 days
Year 2	- 2 Analytical Articles (max 2 days) - 1 Zoom-in (max 2 days) - 1 chapter of Urban Diary (max 3 days) - 1 Narrative input (max 1 day) - Advice and guidance for the MUA (to be agreed between the Expert and the Mua within the total limit of 14 days) - Site visits and on-line meetings (to be agreed between the Expert and the Mua within the total limit of 11 days) - Transfer Deep Dive Site Visit (max 3 days; participation recommended but not compulsory) - Other on-demand knowledge sharing, knowledge exchanges and dissemination activities (at the request of the PS, within the limit of 4 days)	Around 19 days
Year 3	- 2 Analytical Articles (max 2 days) - 1 Zoom-in (max 2 days) - 1 chapter of Urban Diary (max 3 days) - 1 Narrative input (max 1 day) - Advice and guidance for the MUA (to be agreed between the Expert and the Mua within the total limit of 14 days) - Site visits and on-line meetings (to be agreed between the Expert and the Mua within the total limit of 11 days) - Other on-demand knowledge sharing, knowledge exchanges and dissemination activities (at the request of the PS, within the limit of 4 days)	Around 16 days

Year 4 (last 6 months)	- 1 Analytical Article (max 1 day) - 1 chapter of Urban Diary (max 3 days) - 1 Narrative input (max 1 day) - Advice and guidance for the MUA (to be agreed between the Expert and the Mua within the total limit of 14 days) - Site visits and on-line meetings (to be agreed between the Expert and the Mua within the total limit of 11 days) - Transfer Closing Site Visit (max 3 days; participation recommended but not compulsory) - Contribution to preparations of the EUI – Innovative Solution Model (max 2 days) - Other on-demand knowledge sharing, knowledge exchanges and dissemination activities (at the request of the PS, within the limit of 4 days)	Around 15 days

Task C and D

Regarding Task C, no fixed breakdown of activities per IA project implementation year is foreseen and IA Expert is invited to flexibly use allocated number of days without exceeding indicated ceilings. The only activity that has a regular, yearly character relates to IA Expert's participation in annual online IA Experts meetings (max 0.5 day if foreseen per meeting). Regarding Task D, there is no indicative timeline foreseen as all activities under this Task have an ad-hoc, demand driven character.

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, <u>C1 level certificate[3] required from non-native speakers</u>)

▷   University degree plus the minimum number of years of relevant work experience in topics related to Sustainable Urban Development (SUD) within Cohesion Policy (see Annex SUD-related themes), specifically:

o   Doctoral degree (PhD) and at least 7 years of relevant work experience

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[3] 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). <u>Candidates without a certificate will be required to pass an online English test organised by EUI.</u>

- o OR Master's degree and at least 10 years of relevant work experience
- o OR Bachelor's degree and at least 12 years of relevant work experience

- ▷ IT literacy

- ▷ Mission-specific requirements:
  - o Excellent understanding and direct experience of challenges for Sustainable Urban Development in Europe, as well as of the potential for experimentation of innovative solutions.
  - o <u>Excellent knowledge and experience on the theme addressed by the project(s) you have selected within the policy areas addressed by the EUI-IA Call 2</u> (Greening cities, Sustainable Tourism, Harnessing talent in shrinking cities).
  - o Excellent understanding of one of the 3 topics, in line with the preferred project(s) selected: Greening cities, Sustainable tourism, Harnessing talent in shrinking cities.
  - o Experience in proposing strategic and operational advice for innovative urban projects in at least two different EU Member States (at least 3 examples).
  - o Ability to understand specific local situations and to adapt mechanisms, tools and methods to different local realities and specificities (at least 3 examples).
  - o Capacity to propose research and policy watch for the project on relevant policy areas and practices. Ability to make the content accessible to urban authorities and partners.
  - o Ability to capture the knowledge generate by projects, capacity to understand the innovative dimension of a project, analyse its success factors, and draw conclusions relevant to policymakers (at least 3 examples of relevant diagnosis, case studies or research).
  - o Ability to produce clear and concise written pieces that capture projects' progress and lessons learnt and present good practices tailored for practitioners and policymakers (at least 3 examples).
  - o Ability to present knowledge in creative ways and proficiency in conveying complex concepts to non-English speakers.
  - o Ability to collaborate with other Experts in a harmonious and effective way.
- ▷ General skills and requirements
  - o Understanding of the urban dimension of EU policies and of Cohesion Policy in particular is desired.
  - o Good oral communication and presentation skills.
  - o Video or podcast skills appreciated (if so please add to your application links to podcast or videos you have created).
  - o Knowledge of MUA language can be a plus.

4.2   Applications

Candidates who **are not** part of the EUI Pool of Experts and who are interested in applying in the framework of the present Call for Applications **shall submit** the following:

▷   **A detailed CV in English**

▷   **A filled in Application Form :** https://ec.europa.eu/eusurvey/runner/Call2_IA_Experts

   o   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.

Candidates who **are** part of the EUI Pool of Experts and who are interested in applying in the framework of the present Call for Applications **shall submit** the following:

▷   **A filled in Application Form** https://ec.europa.eu/eusurvey/runner/Call2_IA_Experts_pool

   o   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 15th October 2024 by 23.59 CET.

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**, MUAs might be invited to the interviews. Following the interviews with shortlisted candidates, the Permanent Secretariat will then select the IA 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 SELECTION

Selection procedure and kick-off	
16 September 2024	Launch of the Call for IA Experts
15 October 2024	**Deadline for applications**
15 November 2024 (tbc)	Shortlisted candidates are informed and invited to choose a date/time for interview
20 November - 5 December 2024 (tbc)	Online interviews
early December 2024 (tbc)	Notification for selected Experts
14-15 January 2025	**In person** Kick-off meeting (in Lille, France or in Brussels, Belgium)

All Applicants are requested to save the date of 14-15 January 2025 for the compulsory Kick-off Meeting with the Permanent Secretariat and representatives of the EUI-IA Call 2 projects.

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.

6.3   Overall timeline and the indicative breakdown of the days

The Permanent Secretariat is looking to contract Experts initially for the period December 2024 – November 2028 covering the Implementation and Closure phases of EUI-IA Call 2 projects, as well as potential extension that EUI-IA project might request.

With the first Work Order (following this Call for Experts), EUI Experts will be contracted to support of EUI-IA Call 2 projects and the Permanent Secretariat following the tasks described above. Subsequent Work Orders dedicated to on-demand support for the EUI-IA projects and, potentially, other needs identified by the Permanent Secretariat, 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.

The proposed allocation of number of days per activity has an indicative character. The Permanent Secretariat reserves the right to modify these figures.

6.4   Incompatibility of EUI Experts with other positions

To avoid any conflict of interest, roles described in this Call for Experts cannot be allocated to any Expert acting as an Assessor or Coordinator of Assessors for the selection of EUI-IA Call 2 projects.

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.