

EUROPEAN
U R B A N
INITIATIVE

EUI Pool of Experts

1st call for EUI experts to support
capacity building activities

Terms of reference



Co-funded by
the European Union



INTRODUCTION TO THE EUROPEAN URBAN INITIATIVE (EUI)

In times of rapid urbanisation (predictions show that the share of urban population in Europe will continue to grow, and it is likely to reach more than 80% by 2050), on the one hand European urban areas are increasingly facing many challenges, on the other – new opportunities emerge. To face the challenges and make the most of development opportunities, EU cities and towns must also keep transforming and developing their creative and innovative potential, responding to the needs of sustainable urban development. Complex challenges and transitions often cannot be solved without strong capacities and innovative thinking at all levels of policy and action and, in particular, at local level. There is also strong evidence suggesting that the nature and scale of the challenges facing urban authorities demand much more than traditional policies and services.

In this context, the Cohesion policy legislative package for 2021-2027 included the establishment of the EUI (a successor of the Urban Innovative Actions Initiative implemented during the 2014-2020 programming period). This novel 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 European Union relevance.

The legal basis of the EUI is set out in Article 12 of the European Regional Development Fund/Cohesion Fund Regulation which 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 at offering coherent support to cities to overcome what has been in the past a fragmented landscape of manifold initiatives, programmes, and instruments in support of cities under Cohesion policy.

The EUI is managed by the Commission's Directorate General for Regional and Urban Policy via indirect management. The Region Hauts-de-France (France) has been designated as Entrusted Entity for the implementation of the EUI. A Permanent Secretariat (PS) has been set to ensure the management of the Initiative.

INTRODUCTION TO EUI CAPACITY BUILDING

Building on previous Urban Development Network (UDN) activities, the European Commission Joint Research Centre methodologies, the TAEIX REGIO Peer 2 Peer mechanism as well as UIA capitalisation work, EUI capacity building activities contribute to the following specific objectives:

To improve the capacities of cities in the design of sustainable urban policies and practices in an integrated and participative way

To improve the design and implementation of sustainable urban strategies and action plans in cities

The main activities proposed by EUI to contribute to these objectives are city-to-city exchanges, peer reviews and capacity building events. The capacity building activities will be officially launched on 17 March 2023 at the Cities Forum in Turin, Italy.

Sustainable Urban Development (SUD) within Cohesion Policy should be primarily understood in the context of Article 11 of the European Regional Development Fund (ERDF)/Cohesion Fund (CF) Regulation¹, in conjunction with Article 28 (Integrated territorial development) and Article 29 (Territorial strategies) of the Common Provisions Regulation². Article 11 provides the regulatory framework for urban authorities to design and implement SUD strategies, and to be involved as decision makers in project design and selection. Building the capacities of urban authorities on these challenges is key to ensuring that SUD strategies and the related ERDF investments (minimum 8% of ERDF resources in each EU Member State) deliver good results.

The target group of EUI capacity building covers all urban authorities in the European Union, in particular Article 11 cities, cities participating in the mainstream Cohesion policy programmes and Managing Authorities. Special attention is paid to cities from less developed and transition regions, functional urban areas and small and medium-sized cities³.

The main features of the city-to-exchanges, peer reviews and events which are covered by this call for experts are described in the following sections.

EUI POOL OF EXPERTS

A pool of EUI Experts will be set up to support the PS with the delivery of the initiative. The pool will gather experts who will be cooperating with the PS to support projects, capitalisation or capacity-building activities or solicited for ad-hoc expertise when needed by the PS and for the support to the Urban Agenda for the EU.

Within the pool, the PS will launch specific calls for interest, which will invite individual experts or teams of experts to apply for specific missions. Experts or teams of experts within the pool may also be directly awarded specific missions for which they meet the requirements, up to a certain amount of working days.

EXPERTS SELECTED VIA THE PRESENT CALL

The present call will select experts to join the pool and support activities within the EUI Capacity Building strand: city-to-city exchanges, peer reviews and capacity building events.

Candidates are invited to express their interest in one or more of the following expert roles:

- City-to-city exchange evaluator
- City-to-city exchange moderator
- Peer review expert
- Curriculum designer
- Event moderator

¹ Article 11 of [Regulation \(EU\) 2021/1058](#) of the European Parliament and of the Council of 24 June 2021: "To address economic, environmental, climate, demographic and social challenges, the ERDF shall support integrated territorial development based on territorial or community-led local development strategies (...) that are focused on urban areas, including functional urban areas ('sustainable urban development')".

² Article 28 and Article 29 of [Regulation \(EU\) 2021/1060](#) of the European Parliament and of the Council of 24 June 2021

³ Those with less than 500,000 inhabitants.

The experts selected for city-to-city exchange and peer review roles will be immediately selected following the closure of the call, in accordance with the timeline on page 9, and are expected to be operational from end-April 2023 onwards.

For experts interested in the curriculum designer and event moderator roles, CVs that pass the eligibility check will be kept on hold until a specific mission is confirmed. For capacity building events planned for autumn/winter 2023, the selection procedure for these events is expected to take place by June.

Experts selected in this call that join the pool will be able to express their interest in additional missions to be advertised in subsequent calls related to activities across the EUI strands (e.g., Capacity Building, Innovative Actions, Knowledge and Capitalisation, Urban Agenda for the EU). To take on additional missions, experts in the pool will have their applications checked against any role-specific requirements, having already passed the eligibility check when entering the pool.

Candidates who meet the minimum eligibility requirements and have a profile that might be interesting for future missions may be invited to join the pool even if they are not shortlisted for interview or selected for the role applied for in this call.

SELECTION CRITERIA, MISSIONS AND ACTIVITIES

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 certificate⁴ required from non-native speakers)⁵
- University degree in any field 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
 - o OR Master's degree and at least 10 years of relevant work experience
 - o OR Bachelor's degree and at least 15 years of relevant work experience
- IT literacy

For this call, the following table describes the role-specific requirements against which applications will be assessed in addition to the eligibility requirements listed above.

Activity 1: City-to-city exchanges

Methodology: In-person visits or online exchanges carried out between cities. Peer cities share new working methods and innovative approaches on specific thematic/implementation challenges identified by the applicant city that are related to the design and implementation of SUD strategies.

⁴ 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. Tests are expected to take place the week of 11-14 April.

⁵ For country-specific missions to be carried out in other EU languages, EUI may launch calls for experts that do not require C1 English level. These experts would be managed outside of the EUI pool of experts.

Objective: Applicant cities directly benefit by improving their capacities to tackle their specific challenge(s) as identified in the application. Peer cities may also improve their capacities by increasing their understanding of how their working methods and innovative approaches may be applied in different contexts.

Expert role	Details
1.1 City-to-city exchange evaluator	<p><u>Indicative description of tasks:</u> Evaluating applications received on a rolling basis during open calls. Evaluation consists of reading application form and writing an evaluation report to conclude on:</p> <ul style="list-style-type: none"> - Eligibility of applicant, - Relevance of thematic focus, - Motivation for applying, - Relevance of peers. <p><u>Indicative workload and timing:</u> 0.5 to 2 hours of work are foreseen per application, including coordination with EUI and revision if needed. An initial team of up to 3 evaluators is expected to be selected. Applications will be allocated to evaluators one by one upon receipt. Applications must be evaluated within two weeks of allocation. Up to 100 applications may be received until end November 2023 when the first call is expected to close.</p> <p><u>Role-specific requirement:</u> Experience evaluating applications of urban development and/or European projects, applying scoring systems, making recommendations for selection or similar. An example of at least one relevant mission should be provided.</p>
1.2 City-to-city exchange moderator	<p><u>Indicative description of tasks:</u> Participate in the city-to-city exchange to support the learning process, by carrying out the following potential tasks or similar, upon request by the applicant:</p> <ul style="list-style-type: none"> - Reviewing agenda developed by applicant and proposing improvements if needed to ensure a successful exchange, - Leading or participating in a pre-meeting among applicant and peers, - Facilitating the exchange between applicant and peers, including the adaptation and use of creative discussion methodologies, - Supporting adaption of the peer recommendations to applicant’s urban context, - Supporting applicant in documenting the key recommendations and lessons learned for follow-up report. <p><u>Indicative workload:</u> 4-7 working days are foreseen for a city-to-city exchange consisting of one visit, depending on duration and format (in-person or online)</p>

	<p>An initial team of up to 6 city-to-city moderators is expected to be selected. The aim is to compose a team of experts with complementary experience across the range of economic, social, and environmental challenges related to SUD.</p> <p><u>Role-specific requirements:</u></p> <p>Experience moderating events aimed at facilitating learning among cities. Examples of at least 5 such events to be provided including their dates, participants, thematic scope, and format (online, offline).</p> <p>Experience working with cities on challenges related to the design and implementation of SUD strategies and/or finding possible solutions to urban policy challenges. Examples of at least 3 such missions to be provided including dates, beneficiary city/strategy, scope of mission, and format of activity (online, offline).</p>
<p>Activity 2: Peer reviews</p> <p><u>Methodology:</u> Several SUD strategies (article 11 of the ERDF/CF regulation) are reviewed simultaneously by peers.</p> <p><u>Objective:</u> Cities under review directly benefit by improving their capacities to design and implement SUD strategies and practices in an integrated and participative way. They also benefit from the improved design and implementation of the SUD strategy itself. Participating peer cities not under review also improve their capacities.</p>	
Expert role	Details
2. Peer review expert	<p><u>Indicative description of tasks:</u></p> <p>Supporting the entire peer review process, including:</p> <ul style="list-style-type: none"> - Evaluation of peer review applications, - Clustering of cities under review into events, - Identifying peers via call for peers and via direct contacts as needed, - Accompanying cities under review with review and preparation of SAT4SUD analysis, background paper, and guiding questions as needed, - Overseeing preparation of recommendations by peers, - Organising webinar one month before peer review to prepare event, - Moderating 2-day peer review event, - Drafting of follow-up report within ten working days after event including review of EUI PS, - Participating in follow-up webinars 6 months after peer review event. <p><u>Indicative workload and timing:</u></p> <p>A pilot peer review is expected to be organised in June 2023 based on the results of a JRC call for interested cities launched in autumn 2022.</p>

A first call for peer reviews will launch on 17 March 2023. The call aims to identify indicatively 9-12 cities under review. The cities under review will be clustered into 3 events to take place in September-December 2023.

Up to 50 working days per expert are foreseen to support the first call for peer reviews and the pilot peer review in June 2023. Up to 10 additional working days will be allocated to the expert coordinator.

8-10 peer review experts are expected to be selected. This team of experts is expected to be operational from end-April 2023. Additional peer review experts may be appointed on an ad-hoc basis to support with event moderation, reporting etc.

For any country-specific peer reviews to be organised in languages other than English, a dedicated separate team of peer review experts with the necessary language skills may be composed via a separate call for experts.

Role-specific requirements:

Experience working with cities on challenges related to the design and implementation of SUD strategies and/or supporting urban authorities and stakeholders with finding possible solutions to urban policy challenges. Examples of at least 3 such missions to be provided including dates, beneficiary city/strategy, scope of mission, and format of activity (online, offline).

Experience moderating events aimed at facilitating learning among cities. Examples of at least 5 such events to be provided including their dates, participants, thematic scope, and format (online, offline).

Experience with the use of the Joint Research Centre / Urban Development Network peer review methodology or similar peer review methodologies. An example of at least one experience to be provided.

Coordinator role:

An expert coordinator will be selected to support the PS with the management of peer review experts' work. In addition to carrying out the tasks required of all peer review experts, the coordinator will be tasked with supporting the allocation and pairing of experts for specific tasks, reaching consensus, harmonising outputs when needed and other tasks related to supporting the operational management of the team of experts and peer review sessions.

A total of 10 additional working days are estimated to be attributed for this task.

If a candidate expresses interest in this role, they must fulfil the following additional requirement:

Experience in leading a team of experts and team management. Examples of at least 3 such missions to be provided including their dates, participants, thematic scope, and format (online, offline).

Activity 3: Capacity building events

Methodology: Urban authorities and managing authorities exchange information with each other and with the European Commission on the implementation of SUD strategies (article 11 of the ERDF/CF regulation), and on the synergies between Cohesion policy, UIA/EUI-IA, URBACT IV and the UAEU. Organised in various formats (seminars, workshops, trainings) and at different scales (EU-wide, multi-country, or country-specific), mixing expert-led and peer learning.

Objective: Participants benefit from improved knowledge and knowhow on the design and implementation of SUD strategies and action plans, and urban innovation.

Expert role	Details
3.1 Event moderator	<p><u>Indicative description of task:</u></p> <p>Moderating capacity building events of all sizes, to include:</p> <ul style="list-style-type: none">- Preparing a session script,- Briefing speakers, <p>Moderating sessions of different sizes and formats, providing relevant thematic inputs and drawing conclusions on-the-spot,</p> <ul style="list-style-type: none">- Liaising with the curriculum designer in charge of the team of experts involved in delivering the event. <p><u>Indicative workload and timing:</u></p> <p>Up to 5 working days depending on event.</p> <p>7 capacity building events are foreseen in 2023.</p> <p>Experts will be required to support the moderation of events in autumn/winter 2023. The preparation of these events and the selection of experts for these roles is expected to take place by June.</p> <p><u>Indicative role-specific requirements:</u></p> <p>At least 5 examples of moderating events or learning processes targeting cities, including examples of such events with information on their dates, scope, theme, and format (online, offline)</p> <p>Additional requirements may be set according to the needs of individual events once the topic and objectives are confirmed.</p>
3.2 Curriculum designer	<p><u>Indicative description of tasks:</u></p> <p>Develop concepts and deliver capacity building events of all sizes based on initial inputs from EUI, including:</p> <ul style="list-style-type: none">- Designing session (content and format),- Identifying, inviting and briefing of speakers,

	<ul style="list-style-type: none"> - Preparing, delivering content, and moderating the event, - Coordinating event moderators/other contributing experts. <p>Develop concepts and deliver other activities as required (e.g., MOOCs, etc.)</p> <p>A team of experts can be required for a specific activity. This team would be coordinated by the curriculum designer.</p> <p><u>Indicative workload and timing:</u></p> <p>Indicative estimate of 15 working days depending on event duration, complexity and format, to be further specified per activity.</p> <p>Up to 7 capacity building events are foreseen in 2023.</p> <p>Experts will be required to support the curriculum design of events in autumn/winter 2023. The preparation of these events and the selection of experts for these roles is expected to take place by June.</p> <p><u>Indicative role-specific Requirements:</u></p> <p>5 relevant examples of designing and delivering events for cities in themes related to SUD.</p> <p>Relevant experience in management of team of experts to deliver an event.</p> <p>Additional requirements may be set according to the needs of individual events/activities once the topic and objectives are confirmed.</p>
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APPLICATIONS

Candidates are invited to apply to the present call for experts by respecting the procedure indicated on the EUI website and in this document. In the Application Form, candidates are requested to:

1. Indicate the role(s) they are interested to apply for.
2. Describe the main skills they would bring to the role(s) and provide evidence of their experience while respecting the word limit in each question box.

The application form will allow the EUI Permanent Secretariat to assess the candidates' eligibility and suitability for the role(s) that they applied for. Therefore, the answers included in the application form should be specifically tailored to the question asked and not a simple repetition of the content of their CV.

In addition to the application form, all applicants are required to submit a CV of maximum 5 A4 pages in Europass format, maximum 1 MB size, detailing your qualifications and work experience: The relevant duration in months along with the start date and end date **must** be provided for any employments or missions. Examples of previous work can be included as attachment or hyperlinks. This may include links to event recordings to demonstrate evidence of your speaking/moderating skills. 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 23:59 (CET) 19 March 2023 via EU Survey, as indicated on the EUI website.

SELECTION PROCEDURE

The selection of applications for the EUI Pool of Experts will be performed by the PS 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 Evaluation
- Quality Evaluation

Applications from all eligible candidates will be checked against role-specific requirements for any capacity building roles that the candidate is interested in.

A shortlist of eligible candidates that meet the eligibility and role-specific requirements for the missions applied for 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 it is highly recommended that applicants upload the proof of language level in the application form. The proof of English level must be provided before 14 April at noon at the latest.

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

INDICATIVE TIMELINE FOR CALL

The indicative timeline for this call for experts is detailed below. Candidates are required to ensure their availability for a language test (if applicable), an interview, and the kick-off meeting- on those indicative dates – all of which will be organised online.

Launch of call for experts	23 February 2023
Closing date for receipt of applications	19 March 2023
Shortlisted candidates are informed and invited to choose a date/time for interview	7 April 2023 (TBC)
Interviews take place online	11-14 April 2023 (TBC)
Indicative kick-off meeting for experts	27 April 2023 (TBC)

Start of missions	Starting from end-April 2023
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CONTRACTUAL DETAILS

CONTRACTUAL MANAGEMENT

The external service provider, in charge of the eligibility evaluation 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 PS will coordinate and support the activities of the external service provider. Only PS is responsible for the quality control of the activities and deliverables of the members of the Pool of Experts.

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 number of days to be allocated to each expert depends on the number of activities to be organised.

INCOMPATIBILITY OF EUI EXPERTS WITH OTHER POSITIONS

To avoid any conflict of interest, an expert cannot act as evaluator for an Urban Authority that they have worked with in the past 2 years. Declarations of conflicts of interest will be requested upon signing the contract. Experts will be required to inform the PS in case they have been allocated an application from an Urban Authority they worked with in the past 2 years.

Experts may be selected to carry out any combination of the roles indicated in the present call. In the event that any potential conflict of interest is identified, the PS may allocate the support to implementation of the activity to an expert that was not involved in its evaluation (e.g., the moderation of a city-to-city exchange would be allocated to an expert that did not evaluate the application, the support to cities benefitting from a peer review would be allocated to an expert that did not evaluate the application).

CONTACT

For questions regarding the present Call for Experts, please contact experts@urban-initiative.eu. In case of technical issues on EU Survey, please contact us before the closure of the call.

ANNEX: SUD-RELATED THEMES

Productive, smart and connected	Research and Innovation
	Digital transition
	Localising production
	Decarbonised mobility
	Culture and sustainable tourism
	Support to Small and Medium Enterprises and entrepreneurs
Green	Sustainable soil and land use
	Resilient environments
	Climate adaptation
	Clean and healthy environments
	Biodiversity and nature protection
	Energy transition
	Circular Economy
Just and Inclusive	Inclusion
	Access to housing
	Education and employment
	Access to essential services
Place based	Safe and secure urban environment
	Balanced territorial development (including functional urban areas and urban-rural linkages)
	Urban regeneration
	Sustainable urban planning
Territorial tools	Integrated territorial investment
	Community-led local development