



**Call for Applications  
for  
Independent Experts  
NetZeroCities  
Climate City Contract  
Investment Plans  
Re-Release 1**

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**Amended text has been highlighted in red.**

## 1 Summary

The purpose of this call is to extend the EIT Climate-KIC pool of Independent Experts (Experts) to support the evaluation of NetZeroCities (NZC) Climate City Contract (CCC) **Investment Plans**, which are submitted by Mission Cities as part of the Climate City Contracting process. Selected Experts from this call will be placed in the EIT Climate-KIC Experts pool and receive a three-year term Framework Agreement Contract that covers the general terms and conditions for providing Expert services to EIT Climate-KIC.

Experts in the pool may then be assigned to review (a) specific Investment Plans and receive a detailed Assignment Summary outlining the work. Assignments to undertake work via the pool will be based on the information provided in the Application. In the case of this call, the focus is on deep and significant expertise/experience related to finance and investment. Prior to any work assignment, contracted Experts will be issued guidelines covering a description of the tasks, duration, remuneration rates, and reimbursement methods in the Assignment Summary.

## 2 Re-Released Timeline

Call Opens	13 December 2023
Application Deadline	Open until filled
Review and Selection Period	Applications to this call will be reviewed on an ongoing basis until the desired number of reviewers are achieved.
Notification Period	
Framework Agreement Signed	
Expert Review of Investment Plans Period	

## 3 Contact

All efforts have been made to ensure the accuracy and validity of information contained in this call. Please contact [Experts@climate-kic.org](mailto:Experts@climate-kic.org) with questions regarding this call, with **NZC CCC Investment Plan Call** in the subject.

## 4 Background

### 4.1 About EIT Climate-KIC

EIT Climate-KIC is the European Union's (EU) largest public-private partnership addressing climate change through innovation. It has been predominantly funded by the European Institute of Innovation and Technology (EIT) and given a formal mandate to be the EU's climate change innovation agency, tasked with helping build European sustainable jobs, growth, and competitiveness.

EIT Climate-KIC brings together diverse communities to catalyse systemic change through joined-up, collaborative innovation, spanning finance, technology, regulation, citizen engagement and other levers of structural change.

### 4.2 Background to the EIT Climate-KIC Experts Pool

EIT Climate-KIC appoints Experts with subject matter expertise and experience to conduct reviews and evaluation during competitive calls for proposals and/or programme review processes. Experts

are identified through open calls and selected to be admitted into the Expert pool. When a review or evaluation is required, Experts from the pool are matched to the specific content and are contacted to confirm availability and interest in review and evaluation. If selected to review and evaluate during a particular process, an Assignment Summary is sent by EIT Climate-KIC and signed by the Expert and EIT Climate-KIC.

In this call, EIT Climate-KIC is looking to add Experts to the existing pool with specific knowledge, expertise, and experience in investment planning and financing, to review NZC Climate City Contract (CCC) Investment Plans that are submitted by Mission Cities.

### 4.3 NetZeroCities (Specific Grant Agreement (SGA)-NZC)

SGA-NZC is a three-year project funded by the Horizon Europe Research and Innovation Programme to scale-up and enhance the NZC platform, initiated under the Horizon 2020 Research and Innovation Programme, in support of the [European Union's Green Deal](#). The NZC platform is designed to help cities overcome the current structural, institutional, and cultural barriers they face and enable them to **achieve climate neutrality by 2030**. The platform offers advanced capabilities related to systemic change; citizen engagement and participation; participatory and innovative governance; capital and financial structuring; and social innovation, to ensure cities have access to expertise needed to address their challenges in becoming climate neutral.

NZC supports the EU's Mission of "[100 Climate-Neutral and Smart Cities by 2030](#)", launched as part of the Horizon Europe programme. The project works as a service-oriented platform supported by world-class practitioners. It helps European cities by providing them with the support and solutions they need to achieve their net-zero goal in a socially inclusive way. New and existing tools, resources, and expertise are developed and collated, and promoted into a one-stop platform accessible to all cities through an online portal. To find out more, visit the NZC website: <https://netzerocities.eu/>.

### 4.4 NZC Climate City Contracts, Action Plans, and Investment Plans

To achieve the Mission for Climate-neutral and Smart Cities by 2030, the 112 participating cities (Mission Cities) are required to prepare CCCs. This is a strategic governance tool that helps cities align with the Mission's ambitions and actions. The CCCs consist of three elements:

- **Commitments:** a set of politically negotiated commitments among key stakeholders.
- **An Action Plan:** building on previous climate action plans, but specifically tailored to align with the Mission's objectives.
- **An Investment Plan:** identifying the funding and financing requirements (public and private) to achieve climate neutrality.

The European Commission assesses these CCCs and assigns a "Mission Label" to cities that have developed their CCC to a satisfactory standard, demonstrating their viability in achieving Mission outcomes. As part of this process, the NZC **consortium** is tasked to engage a group of Experts to contribute to the review of the Investment Plans.

**The Investment Plan:** Whilst many cities have experience developing climate action plans and undertaking advanced and innovative efforts to direct capital to support those actions, the concept of a Climate Neutrality Investment Plan is quite new. The Climate Neutrality Investment Plan will be a systematic map of the costs and capital that cities need to reach climate neutrality by 2030. This work will help structure the way they plan, organise, and develop an economic and financial strategy, and help cities mobilise capital from national and international funding platforms and financial institutions. There are several characteristics that define an Investment Plan:



Figure 1: Climate Neutrality Investment Plan's key characteristics

**The Investment Plan** and the **Action Plan** will be closely aligned. The Investment Plan will build upon the portfolio of actions and measures cities have committed to take within their Action Plan and look to quantify the capital needs and sources to deliver on these actions. Some actions will directly impact the Investment Plan (for example: increased levy on diesel cars in the city centre), whilst others will act as enabling actions to implement the Plan (for example: improvement of internal capacity). Cities will iterate across both plans, linking actions to impact and then identifying the costs of these actions and sources of capital to implement the actions.

## 5 Eligibility

To be eligible for this call:

1. Application and all required documentation must be submitted on time and in English.
2. Applicant may not be engaged with EIT Climate-KIC in any other form (e.g., in a consultancy contract or in advisory or board capacity).
3. Applicant may not be affiliated with or employed by EIT Climate-KIC, or subgrantee of EIT Climate-KIC in the NZC project, the NZC Pilot Cities Programme, and/or party to any consortium with EIT Climate-KIC in the NZC project and related grant agreements.
4. Applicant may not be currently engaged with a Mission City with an Investment Plan.
5. Applicant must have high verbal and written English proficiency.
6. Applicant must have at least **five** years of professional experience in the investment or finance sector.

## 6 Expertise

### 6.1 Scope of Work

This call is seeking Applicants **with the following experience and knowledge:**

1. **Professional experience in financing and/or capital and investment planning, such as evaluating financial situations, defining financial goals, assessing risk tolerance, designing, monitoring, and rebuilding investment portfolios.**

2. Experience working in/with city and/or public administrations, supplementing their expertise and knowledge with contextual understanding of the dimensions of effective capital and investment planning and execution. This encompasses **experience with city and public finances, including product development and structuring.**
3. Experience with city, regional, national, and European policies. Policy development related to investment and finance is considered an asset.
4. Familiarity and working knowledge of **financial instruments, such as loans, grants, debt management, development of financial** structuring, preferably including experience working with public authorities.
5. **Familiarity and working knowledge of blending financing, loans, and private placements, and ventures, equity.**
6. Knowledge of climate policies and programmes, with practical expertise related to climate-related finance activities; knowledge of city climate actions, and associated finance needs are highly desirable.
7. **Good** understanding of EU regional policy framework, EU programmes supporting regional transitions, including EU structural funds (e.g., infrastructure, cohesion, modernisation funds).

## 6.2 Expectations

EIT Climate-KIC will assign Experts to support the evaluation of Mission Cities' Investment Plans. The Investment Plans to be evaluated will pertain to the relevant city's CCC and associated Action Plan.

Experts assigned to review Investment Plans will become acquainted with the relevant background documents (e.g. the Mission City's CCC and Action Plan, along with supporting materials for context) and attend an online training with EIT Climate-KIC before starting to evaluate the Investment Plans.

Experts will qualitatively evaluate the assigned Investment Plans according to and in line with the instructions for Experts. Each Expert's will be asked to elaborate on their evaluation with suggested recommendations. In a second step, Experts will coordinate in pairs to consolidate and finalise a review summary and recommendations appropriate for direct feedback to Mission Cities.

Where required, Experts will be expected to be available to discuss their evaluation with other Experts and/or NZC consortium partners and the European Commission, in meetings convened by the NZC consortium. In line with the timeline of the review process, Experts will be expected to be available over a short period of one to two months to complete their review.

Experts may also be invited to perform the following tasks on an ad hoc basis, for NZC or other EIT Climate-KIC programmes and projects:

- Evaluate proposals (i.e., for the NZC Pilot Cities Programme) following an assessment process and guidelines. This process requires critical assessment of proposals, completion of a scoring sheet template with detailed justifications, and to provide conditions and recommendations as necessary.
- Attend and participate in meetings to discuss their evaluation with an assessment rapporteur and other reviewers to understand and clarify questions regarding the evaluation process and discuss the outcomes.
- Participate in progress meetings for further assessment, evaluation, or monitoring actions, if necessary, and depending on the conditions stipulated for each proposal.
- Similar tasks related to the evaluation of proposals and/or projects.

## 6.3 Conflict of Interest and Confidentiality

Experts handle sensitive information and will be required to subscribe to stringent confidentiality and non-disclosure provisions contained within the Framework Agreement before receiving any information.

Experts must be free from conflicts of interest regarding any proposal, application, or project they are assigned to review. This will be confirmed at Assignment Summary stage.

For further information regarding conflicts of interest, refer EIT Climate-KIC's Conflicts of Interest & Gifts Policy available at <https://www.climate-kic.org/policies>.

## 7 Fees and Volume of Work

The fees related to work undertaken via the EIT Climate-KIC Experts pool is defined by the programme/project requirement and is detailed in the Assignment Summary. For work undertaken for the evaluation and review of NZC CCC Investment Plans, the per-review rate is €900, inclusive of required briefing and training.

If travel is required by NZC, reasonable travel and subsistence costs will be discussed on a case-by-case basis in advance. At this stage, it is anticipated the tasks will be provided remotely.

## 8 Review and Notification Process

The following tables outline the eligibility, evaluation, and selection criteria and review processes. All applications will be assessed fairly and transparently through the below process. To protect against conflicts of interest, all evaluators and decision makers will abide by the Conflicts of Interest & Gifts Policy and Anti-Fraud, Corruption & Bribery Policy: <https://www.climate-kic.org/policies/>.

### 8.1 Eligibility

Each application will be assessed on whether it meets the eligibility criteria, as outlined below. Applications must meet/pass all eligibility requirements to move on to the next step.

	Eligibility Criteria	How assessed	How Scored
1	Application and all required documentation were submitted on-time and in English.	Application form and attached documents	Pass/Fail
2	Applicant is not engaged with EIT Climate-KIC in any other form (e.g., in a consultancy contract or in advisory or board capacity).	Eligibility Declarations	
3	Applicant is not affiliated with or employed by EIT Climate-KIC, or subgrantee of EIT Climate-KIC in the NZC project, the NZC Pilot Cities Programme, and/or party to any consortium with EIT Climate-KIC in the NZC project and related grant agreements.	<a href="#">Application form</a> : Eligibility Declarations	
4	Applicant is not currently engaged with a Mission City with an Investment Plan.	<a href="#">Application form</a> : Eligibility Declarations	
5	Applicant has at least <b>five</b> years of professional experience in the investment or finance sector.  <b>Please describe your professional experience in the finance or investment sector(s) and how you meet the minimum requirement of at least five years.</b>  <b><i>Make sure your answer clearly demonstrates your expertise as it relates to the Scope. Please make explicit reference to the CV you have uploaded, but do not copy paste a list from your CV.</i></b>	Application form: As indicated by response to Application form Assessment Questions and supporting curriculum vitae (CV)).	



## 8.2 Evaluation

Eligible applications will proceed to evaluation and will be evaluated by at least two EIT Climate-KIC employees against the published evaluation criteria below.

	Question and Instructions	Evaluation Criteria (Based on	How assessed	Weight
1	<p>Please describe your knowledge of and professional experience in financing and/or capital investment planning.</p> <p><i>Make sure your answer clearly demonstrates your expertise as it relates to the Scope. Please make explicit reference to the CV you have uploaded, but do not copy paste a list from your CV.</i></p>	How knowledgeable and experienced is the Applicant with financing and/or capital investment planning?	Score 0-5	15%
2	<p>Please describe your experience working in/with city or public administrations to supplement their expertise and knowledge on capital and investment planning and execution.</p> <p><i>Make sure your answer clearly demonstrates your expertise as it relates to the Scope. Please make explicit reference to the CV you have uploaded, but do not copy paste a list from your CV.</i></p>	How experienced is the Applicant in working with cities or public administrations to supplement their expertise and knowledge on capital and investment planning and execution?	Score 0-5	15%
3	<p>Please describe at least one project that demonstrates your experience working with city, regional, national, and European policies, with any emphasis on policy development related to investment and finance.</p> <p><i>Please note that describing more than one project shows a higher level of your expertise in this area. Provide a qualitative answer and do not copy paste from your CV).</i></p>	How knowledgeable and experienced is the Applicant in working with city regional, national, and European policies related to investment and finance?	Score 0-5	15%
4	Please describe at least one project that	How knowledgeable is the	Score 0-5	25%



	Question and Instructions	Evaluation Criteria (Based on)	How assessed	Weight
	<p>demonstrates your working knowledge of financial instruments, with any emphasis on work with public authorities.</p> <p><i>Please note that describing more than one project shows a higher level of your expertise in this area.</i></p> <p><i>Provide a qualitative answer and do not copy paste a list from your CV.</i></p>	Applicant in financial instruments with public authorities?		
5	<p>Please describe your working knowledge of blending financing, loans, and private placements, ventures equity.</p> <p><i>Make sure your answer clearly demonstrates your expertise as it relates to the Scope. Please make explicit reference to the CV you have uploaded, but do not copy paste a list from your CV.</i></p>	How knowledgeable is Applicant in blending financing?	Score 0-5	10%
6	<p>Please describe at least one project that demonstrates a good understanding of EU regional policy and/or programmes.</p> <p><i>Make sure your answer clearly demonstrates your expertise as it relates to the Scope. Please make explicit reference to the CV you have uploaded, but do not copy paste a list from your CV.</i></p>	How well does Applicant understand EU regional policy, programmes?	Score 0-5	5%
<b>Total</b>				<b>100.00%</b>

The following rubric will be used by evaluators to score:

Score	Description
0	Application fails to address the criteria or cannot be assessed due to missing or incomplete information.
1	Poor. The criteria are inadequately addressed and/or there are serious weaknesses.
2	Fair. The application broadly addresses the criteria, but there are significant weaknesses.
3	Good. The application addresses the criteria well, but several shortcomings are present.
4	Very good. The application addresses the criteria very well, but a small number of shortcomings are present.
5	Excellent. The application successfully addresses all aspects of the criteria. Any shortcomings are minor.

EIT Climate-KIC reserves the right to reject Applicants who score less than 50 percent on the final weighted score across the evaluation criteria.

### 8.3 Selection

A panel will be convened to select up to **25** Applicants to admit to the Experts pool. The selection will be made from applications with the highest scores from the evaluation process and based on the selection considerations outlined below.

Selection Considerations
High level of experience in finance and/or capital investment planning.
High level of experience with independent reviews.
High level of public sector knowledge and experience.
Selecting up to 25 Experts, to provide enough experts in the pool.

### 8.4 Notification

Successful and unsuccessful Applicants will be notified, via email, to the email address provided to EIT Climate-KIC during submission.

EIT Climate-KIC, at its sole discretion, reserves the right to accept or reject any or all the applications received and not to award any agreements and is not bound to give reasons for any decision. Only the execution of a written agreement between a EIT Climate-KIC entity and a supplier(s) will obligate a EIT Climate-KIC entity in accordance with the terms and conditions contained in such agreement.

Entering contractual arrangements with EIT Climate-KIC in connection with this Call for Independent Experts does not guarantee work will be awarded, **as the work is dependent on the number of evaluations needed.**

## 9 Submission

### 9.1 Submission Format

To apply, please use this online form: <https://climatekic.tfaforms.net/158>. No other form of submissions will be accepted.

### 9.2 Submission Language

Applications must be submitted in English.

### 9.3 Submission Deadline

**The call for applications will be closed once the expert pool reaches its desired capacity. Please note**

that the applications will be evaluated on a sequential basis, adhering to a "first-come, first-reviewed" protocol. Early submission is therefore recommended to ensure an expeditious evaluation and the likelihood of selection into the expert pool.

#### **9.4 Data**

All Applicants are required to accept EIT Climate-KIC's [General Terms and Conditions](#) which also includes in particular, the [Privacy Policy](#), [Acceptable Use Policy](#) and [Cookie Policy](#) and warrant and represent that they have the authority to agree and accept these on behalf of the named organisation.

Personal data provided may be processed, including sharing with other organisations, by EIT Climate-KIC and certain sensitive data elements will be visible to other partners or potential partners of EIT Climate-KIC. The named partner organisation or potential partner of EIT Climate-KIC warrants and represents that in providing personal data in the application, the data subjects have consented to the provision of this personal data and the processing of it by EIT Climate-KIC in the manner indicated in accordance with our Privacy Policy, and that the partner organisation or potential partner of EIT Climate-KIC provides the personal data in accordance with applicable law.

#### **9.5 Confidentiality**

EIT Climate-KIC will treat applications confidentially, as well as any related information, data, and documents received in accordance with EIT Climate-KIC's Privacy Policy or as otherwise indicated throughout the application form, subject to section 9.4 Data.

#### **9.6 Terms of Submission**

This call does not commit or obligate EIT Climate-KIC to pay any expenses incurred by Applicants in the preparation of any application. All such expenses are solely at the risk of the Applicant. Applicants agree that application becomes the property of EIT Climate-KIC.

### **10 Awarded Framework Agreement Requirements**

Experts selected for the pool will sign and abide by the [Framework Agreement](#). Interested parties are encouraged to read the agreement template.