



**NET  
ZERO  
CITIES**

**Call for Applications  
for  
Independent Experts  
NetZeroCities  
Climate City Contract  
Investment Plans**

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## 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 Timeline

Call Opens	23 October 2023
<b>Application Deadline</b>	<b>6 November 17:00 CET</b>
Review and Selection Period	November 2023
Notification Period	November 2023
Framework Agreement Signed	November 2023
Expert Review of Investment Plans Period	November 2023

## 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, NZC 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 Scope of Work, Expertise, and 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. Skills, professional experience, and expertise linked to investment planning, financing, and in particular city and public finances, are welcome. Furthermore, an appreciation of systems thinking, and systems change, are core to the objectives of this programme.

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. The results of each Expert’s review are to be elaborated in written form with suggested recommendations included. 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 such EIT Climate-KIC programmes and projects:

- Evaluate proposals (i.e., for the NZC Pilot Cities Programme) following a/the 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 assessment process and discuss the outcomes of the assessment.
- 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.

## 5.1 Expertise

This call is seeking Applicants with:

- Significant experience and high-level expertise in capital and investment planning; public and private finance, including product development and structuring; city, regional, national, and European policies and policy development related to investment and finance.
- 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.
- Familiarity and working knowledge of finance products, development of financing instruments, and financial structuring, preferably including experience in working with public authorities.
- Knowledge of climate policies and programmes, with practical expertise related to climate-related finance activities; knowledge of city climate actions and associated finance needs is highly desirable.
- Excellent understanding of EU regional policy framework, EU programmes supporting regional transitions, including EU structural funds (e.g., infrastructure, cohesion, modernisation funds) Understanding of Horizon Europe framework or other EU funding mechanisms is preferable.
- Good understanding of systems innovation, systems thinking, and systems change is desired.

In addition to the above, and as outlined in the eligibility and assessment criteria, Experts admitted to the pool are expected to have/be:

- At least eight years of experience within a specific industry/sector where knowledge of finance was an aspect of that experience.
- Experienced in providing reviews or similar independent services for funding institutions.
- Fluency in English, both written and verbal.
- Comfortable utilizing digital systems and communications.

## 5.2 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>.

## 6 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.

## 7 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/>.

### 7.1 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
7.1.0	Application and all required documentation were submitted on time and in English.		Pass/Fail
7.1.1	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	
7.1.2	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	
7.1.3	Applicant is not currently engaged with a Mission City with an Investment Plan.	<a href="#">Application form:</a> Eligibility Declarations	
7.1.4	Applicant has at least eight years of professional experience in the investment or finance sector.	Application form: As indicated by response to Application form Assessment Questions and supporting curriculum vitae (CV).	
7.1.5	Applicant has high verbal and written English proficiency.	<a href="#">Application form:</a> Eligibility Declarations	

### 7.2 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.

	Evaluation Criteria (Based on <a href="#">Application Form Assessment Questions</a> )	How assessed	Weight
7.2.1	How experienced is the Applicant in providing reviews or similar independent services for funding institutions and/or with international programmes and organisations?	Score 0-5	25%
7.2.2	How knowledgeable and experienced is the Applicant with	Score 0-5	15%

	<b>Evaluation Criteria (Based on <a href="#">Application Form Assessment Questions</a>)</b>	<b>How assessed</b>	<b>Weight</b>
	EU regional policy framework, EU programmes supporting regional transitions including EU structural funds (infrastructure, cohesion, modernisation funds)?		
7.2.3	How knowledgeable and experienced is the Applicant of, and with, capital markets on complex financial deployment programmes?	Score 0-5	15%
7.2.4	How knowledgeable and experienced is the Applicant with capital and investment planning, working across private and public sector entities?	Score 0-5	15%
7.2.5	How knowledgeable and experienced is the Applicant with climate finance, with specific reference to any work with cities or local authorities?	Score 0-5	15%
7.2.6	How experienced is the Applicant with working in/with city administrations and/or relevant public sector bodies?	Score 0-5	10%
7.2.7	How experienced is the Applicant in any of the following areas (as relevant): innovation, business creation/ modelling?	Score 0-5	5%
<b>Total</b>			<b>100.00%</b>

The following rubric will be used by evaluators to score:

<b>Score</b>	<b>Description</b>
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.

The highest scoring 40 applications will move to the selection process.<sup>1</sup> EIT Climate-KIC reserves the right to reject Applicants who score less than 50 percent on the final weighted score across the evaluation criteria.

### 7.3 Selection

A panel will be convened to select up to 20 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.

	<b>Selection Considerations</b>
7.3.1	Experience profile, with preference for those who have experience across points 3 – 5 in the Assessment Criteria
7.3.2	Experience with independent reviews
7.3.3	Public sector knowledge and experience

<sup>1</sup> EIT Climate-KIC reserves the right to change this number based on the overall quality of applications and the profile of distributed scoring across the assessment process.



Selection Considerations	
7.3.4	Evaluation score (in the case of arbitrating between Experts with similar profile and experience across considerations 7.3.1, 7.3.2 and 7.3.3, above)
7.3.5	Selecting up to 20 Experts, to provide a sufficient number of experts in the pool.

## 7.4 Notification

Successful and unsuccessful Applicants will be notified, via email, to the email address provided to EIT Climate-KIC during submission. The notification period will be tentatively on the date listed in section 2 Timeline.

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 business and shall not be 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.

## 8 Submission

### 8.1 Submission Format

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

### 8.2 Submission Language

Applications must be submitted in English.

### 8.3 Submission Deadline

All applications must be submitted by the date specified in section 2 Timeline. Please note that late applications will not be accepted.

### 8.4 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.

### 8.5 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 8.4 Data.

### 8.6 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.

## **9 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.