

TERMS OF REFERENCE FOR DEVELOPING METHODOLOGICAL TOOLS FOR THE URWAN RESULTS AMPLIFICATION STRATEGY, INCLUDING INTERVIEW GUIDELINES, LIVING LAB METHODOLOGY, INFORMATION EXCHANGE SYSTEM, AND TRAINING NEEDS OF THE PILOT CITIES.

Budget code: EEP001
Project: URWAN
Imputation item: Item 3.5

Introduction

The Associació MedCités / MedCities is an association of cities, with its headquarters in Barcelona, dedicated to sustainable urban development in the Mediterranean. It comprises 80 municipalities and unions of municipalities from seventeen different states and runs projects in the fields of strategic urban planning, urban services, the environment and local economic and social development, as well as training activities, technical support and the capitalisation of best practices. The network was created in 1991, since which time it has carried out dozens of projects in Mediterranean cities.

The URWAN project (Urban Regeneration and Water Management) aims to address climate change challenges in urban areas through the implementation and mainstreaming of Nature-Based Solutions (NBS). The project involves several Mediterranean cities working together to develop and implement innovative solutions for sustainable urban development and climate adaptation.

As the WP4 leader, MedCities is responsible for amplifying and mainstreaming the effects of project results and integrating economic, social, and cultural analysis of barriers to facilitate decision-makers in mainstreaming NBS at the governance level. The objective is to engage policymakers and stakeholders in a multisectoral analysis of barriers to NBS implementation, jointly identifying measures to overcome them with input from final beneficiaries. MedCities will also disseminate the NBS Enabler Pack to amplify impact and ensure result sustainability.

In order to achieve this, the WP4 foresees the following activities:

A.4.1: Creation of an Amplification Strategy for NBS Mainstream

- A.4.1.1: Conducting tailored interviews with local governments to assess limitations and barriers for NBS implementation.
- A.4.1.2: Mainstreaming NBS through the establishment of three Transnational Living Labs, developing a training kit for municipalities, creating an NBS Enabler Pack with policy recommendations, and organizing communication activities and a transferring event.

Deliverable D.4.1.1:

Amplification Strategy - Analysis of Needs for Co-designed NBS Mainstreaming.

Guiding document to identify barriers in co-designed NBS implementation at both local and transnational levels, develop solutions and create the NBS Enabler Pack. To include content from the interviews and a methodology for developing living labs.

A.4.2: Definition of Needs, Hinders, and Opportunities for NBS Mainstreaming

- A.4.2.1: Conducting interviews and engaging stakeholders using the stakeholder map generated on WP1 (D1.1.2) to guide the process.
- A.4.2.2: Hosting and summarizing findings from three Living Labs (Ptuj, Cuba, Malta).

Deliverable D.4.2.1

Conclusions from Interviews and Transnational Living Labs for NBS Mainstreaming.

Document summarizing the needs, barriers, and opportunities for NBS implementation at a local level, identified through interviews with local authorities and insights gathered from transnational Living Labs

A.4.3: Creation of Effective Solutions to Contribute to URWAN Results Mainstreaming

- A.4.3.1: Developing and delivering a tailor-made training kit for six local authorities based on the identified needs.
- A.4.3.2: Co-editing and integrating the NBS Enabler Pack.

Deliverable D.4.3.1 Tailor-made Training Kit

Comprehensive training materials customized for the six partner local authorities, addressing specific needs identified during interviews.

A.4.4: URWAN Amplification and Transferring

- A.4.4.1: Editing and disseminating a video for wider diffusion.
- A.4.4.2: Organizing and executing the final event in Rome.

Deliverable D.4.4.1 Memorandum of Understanding

Signed by Project Partners in which project partners commit to promoting and sustaining the project outputs, particularly the NBS Enabler Pack, beyond the project's duration

1. Objective

The objective of this service provision is to engage External Expert Services for developing methodological tools for the URWAN results amplification strategy, including interview guidelines, living lab methodology, information exchange system, and training needs of the pilot cities.

2. Scope of the services

The scope and characteristics of the services are as follows:

Task 1: Provide methodological tools of the URWAN Amplification Strategy

- Description: Develop methodological tools to integrate in the URWAN amplification strategy methodology for NBS mainstreaming.

Based on the tasks outlined below, the expert should cover the following aspects of the URWAN Amplification Strategy:

- ✓ Review and ensure understanding of key concepts such as Capitalisation, Synergies, Transfer, Mainstreaming, and the Guiding Principles that underpin the strategy.
 - ✓ Develop and refine interview guidelines and tools for collecting relevant data from pilot municipalities on predefined issues.
 - ✓ Propose a methodology for the three international Living Labs, detailing objectives, activities, and expected outcomes, after consultation with project partners.
 - ✓ Define a detailed methodological guideline for LL1, programmed for the 1st week of December.
 - ✓ Support coordination and identify effective information exchange tools during the project lifetime, to guarantee a continuous information flow among partners and pilot cities for the extraction of barriers and solutions. Design and outline the necessary steps and strategy.
 - ✓ Review existing bibliography as a knowledge base to expand, enhance and enrich the project strategy, including recent sources such as the newly released document by Plan Bleu on the topic.
- Related Activity: A.4.1. Creation of an Amplification Strategy for NBS Mainstream.
 - Deliverable: D.1: Amplification strategy document. Deadline: 15th December 2024 (including D1.1, D1.2 and D1.3).

Task 1.1: Preparation of Interview Guidelines

- Description: Develop comprehensive interview guidelines for in-depth interviews with the six pilot cities (three implementing pilots and three involved in planning). Ensure guidelines cover relevant themes and address the needs identified in WP1's initial needs assessment.
- Related Activity: A.4.2.1: Conduct interviews and engage stakeholders using the stakeholder map (D1.1.2)
- Deliverable: D.1.1: Interview guidelines. Deadline: 15th September 2024.

Task 1.2: Preparation of Living Lab Methodology

- Description: Develop the methodology for the three international living labs of the project as well as a detailed methodological guideline for the animation of the first Living Lab (LL) to be held in Ptuj, Slovenia, in December. This methodology will establish a cohesive framework applicable to all three Living Labs planned in the program.

The objectives of the three Living Labs are as follows:

General Secretariat

- LL 1: Extract and analyse lessons learned from frontrunner cities
- LL 2: Explore strategies to support and facilitate the mainstreaming of Nature-Based Solutions (NBS)
- LL 3: Assess and enhance policy uptake and transfer

The Living Lab will address six key themes:

1. **Technical Knowledge and Skills:** Identify the needs in terms of knowledge and technical training required to implement Nature-Based Solutions (NBS) effectively.
 2. **Internal Capacity:** Assess the internal barriers of local administrations to implement, manage and maintain NBS projects.
 3. **Regulation:** Analyze legal and regulatory barriers that may hinder the implementation of NBS.
 4. **Economic Barriers:** Identify financial limitations and funding models necessary for NBS implementation.
 5. **Coordination:** Explore challenges in coordination between different sectors and municipal departments.
 6. **Social Acceptance:** Evaluate how NBS are perceived by citizens and other local stakeholders, and identify strategies to improve acceptance and public participation.
- Related Activity: A.4.2: Development of Living Labs and tailoring them based on feedback from interviews.
 - Deliverable: D.1.2: Living Lab Methodology. Deadline: 30th October 2024.

Task 1.3: Establish implementation steps for coordination and information exchange system with URWAN pilot municipalities

- Description: Collaborate with project partners to design and integrate a feedback mechanism, ensuring the alignment of activities with project goals and enhancing the overall effectiveness of the project through continuous and effective communication with pilot municipalities. The continuous exchange system, detailed in the amplification strategy, aims to facilitate knowledge sharing, barrier identification, and lesson capture among project partners. The system should include clear implementation steps, timelines, and mechanisms for regular feedback and updates throughout the project duration.
- Related Activity: A.4.3: Creation of effective solutions to contribute to URWAN results mainstreaming.
- Deliverable: D.1.3: Coordination and information exchange system methodology and tools. Deadline: 15st December 2024.

Task 2: Undertake Interviews and Analyze Results:

- Description: Conduct interviews with the six pilot cities to test the interview guidelines and participate in interviews with three frontrunner cities under WP1. Analyze interview results to identify barriers and opportunities in NBS implementation at local and transnational levels. The main problems and barriers identified (political, technical, regulation, social, or other) during the interviews will be summarized in an internal document.

- Related Activity: A.4.1.1: Conducting interviews with local governments to assess limitations and barriers for NBS implementation / Activity 4.2: Definition of Needs, Hindrances, and Opportunities for NBS Mainstreaming
- Deliverable:
D.2.1: Report on interview results. Deadline: 31st January 2025.

Task 2.1: Development of Preliminary Training Needs Proposal

- Description: Analyze interview results to identify initial training needs for each of the six partner local authorities (2 sessions to the local authority itself, and up to 1 open to other stakeholders at local level). Propose both common and tailor-made training topics for the sessions based on findings.
- Related Activity: A.4.3.1: Developing and delivering a tailor-made training kit for six local authorities based on the identified needs.
- Deliverables:
D.2.2. Preliminary proposal for training topics tailored to address the needs identified. Deadline: 31st January 2025.

Deliverables and due date:

1. Interview Guidelines
Deliverable: D.1.1
Due Date: 15th September 2024
2. Methodological approach of three Living Labs
Deliverable: D.1.2
Due Date: 30th October 2024
3. Reviewed URWAN Amplification Strategy with Methodological Inputs
Deliverable: D.1 (including D.1.1, D.1.2 and D.1.3)
Due Date: 15th December 2024
4. Analysis of Interviews with six Pilot Cities
Deliverable: D.2.1
Due Date: 31st January 2025
5. Preliminary Proposal for Training Topics
Deliverable: D.2.2
Due Date: 31st January 2025

Reporting and Coordination

The external expert will report to MedCities and coordinate closely with all relevant partners to ensure seamless integration and execution of tasks.

3. Type of service, duration and place of execution

General Secretariat

These terms of reference and the winning proposal will define the conditions of the service as a contract of provision of services from the notification of the order until 31st January, 2025. The service will be carried out in the service provider facilities.

The service will be governed by the Catalan law, the Spanish law and the courts of Barcelona.

4. Base budget of the service

The maximum budget for this service is 14.000,00€ (all taxes included). If the bidder has its tax domicile in Spain, the maximum amount will be 16.940€ including the VAT rate valid on the date of the publication of these terms of reference which is 21%.

Any offer exceeding this amount will be rejected.

It is understood that the budget includes all of the costs that the successful bidder is required to pay for the normal fulfilment of the services contracted such as general expenses, financial costs, insurance, transport and travel expenses, remuneration for the staff under its control and all verification and job costs.

5. Price of the contract and economic conditions

The administrative details of the Contracting Body are:

ASSOCIACIÓ MEDCITIES AND/OR MEDCITÉS
C / 62. 16-18. EDIFICI B, ZONA FRANCA
08040 BARCELONA – CATALONIA - SPAIN
Tax number (VAT): ESG66401258

The contract price is the one established by the award of the tender, in line with the offer submitted.

Two invoices are required according to the following details:

- 50% of the total amount on 15th December 2024 upon completion and submission of all deliverables for Task 1 (D.1, including D.1.1, D.1.2 and D.1.3)
- 50% of the total amount on 31st January 2025 upon completion and submission of all deliverables for Task 2 (D.2 and D.3)

Offer and invoices must contain at least the following information:

- Full tax name and full tax address of the supplier
- Tax identification number of the supplier
- Complete MedCities data
- Offer/Invoice number
- Offer/Invoice date
- Budget code and project name indicated in the header of this document
- Description of the service to be provided/provided
- Detail of the amount of the service and taxes (if any)

The payment term of the invoice will be: bank transfer around 30 days after the date of the invoice (bank account details are required) and always after internal favourable report issued by the General Secretariat of MedCities at the end of each phase.

The service provider will be directly responsible for paying the local or national taxes applied to the services except if the service provider is fiscally domiciled in Spain, whereupon the current tax law in respect of personal income tax (IRPF) will be applied.

Invoices must be sent either by post to the offices of the General Secretariat of MedCities or, if they are in digital format, to contact@medcities.org.

Bank charges arising from the payment of invoices will be shared (SHA according to bank coding).

MedCities may require information from the service provider regarding its compliance with obligations relating to social security contributions and the payment of taxes.

Those non-EU service providers will be required to present a certificate of tax residence within 7 calendar days of the award of the service. If the aforementioned document has not been provided to MedCities within 7 days, the contract may be terminated.

6. Participation requirements

Those bidding for the service can be individuals or companies that have the full capacity to carry out the work, that are not subject to a ban on hiring staff and that can demonstrate their technical reliability and professional experience.

7. Confidentiality clause

The information that the service provider will have access to in order to fulfil the purpose of this contract must be kept strictly confidential and must not be used for any activity not covered by this contract. In circumstances where a particular use of the information gives rise to doubts in respect of this confidentiality clause, the service provider must, in all cases, request the consent of MedCities.

8. Ownership and authorship of the work

The ownership and authorship of any service provision work carried out belongs to MedCities. As owners of the study, any use or mention of it in publications, articles, interviews, conferences, etc. must have the express authorisation of MedCities.

9. Termination of the service

By giving notice of one month, the service can be terminated by either party before the date indicated in Point 3 of these terms of reference for objective reasons or for the reason described in the last paragraph of point 5 of this terms of reference.

10. Submission of offers

The offer must be sent to the following email address: contact@medcities.org

- Proposal submission period: 22 working days from the date of these terms of reference.

General Secretariat

- The subject line of the email should specify “Service offer for developing methodological tools for the URWAN results amplification strategy, including interview guidelines, living lab methodology, information exchange system, and training needs of the pilot cities.”

The offer must include the extent of the services offered and fulfil the conditions expressed in the previous sections. Notwithstanding that the candidate can attach to their offer any complementary information they consider to be of interest, the tender must include the following documentation:

- o Detailed offer of the services, including a detailed methodological proposal and calendar.
- o Economic proposal: candidates must submit an economic proposal in euros that either they or their representative must sign. The prices offered should include any type of tax, charge or fiscal ruling of a European, state, autonomous community or local nature as indicated in Points 5 and 6 of these terms of reference.
- o CV of the professional person or company involved and of the working team, giving relevant examples of similar work undertaken and, if applicable, international experience.

In the event that additional information is required to present the offer, we invite you to contact MedCities by writing to the email address contact@medcities.org. Only written questions about clarifications of the presentation of offers will be answered.

MedCities may request additional information related to the proposal if it deems it appropriate. If this is the case, the proposals that require clarification must be answered within a reasonable period established by the evaluation team.

11. Assessment criteria

The most advantageous offer will need to be evaluated bearing in mind the cost-effectiveness ratio in accordance with the overall proposal. The assessment could take the price-quality ratio into account.

MedCities guarantees equal treatment of the people/companies bidding and will keep their offers confidential.

The person/company adjudicated as the successful bidder will be notified within a period of 5 working days from the final submission date for offers.

Barcelona, 25th July, 2024

Josep Canals Molina
MedCities Secretary General