



EU Experts

Expert Terms of Reference

Funding & Tenders Portal Expert Database 2021-2027

Evaluators and Monitors

Version 1.0
15 June 2022



HISTORY OF CHANGES		
Version	Publication date	Changes
1.0	15.06.2022	

EXPERT TERMS OF REFERENCE

1. Context and background information

The experts must assist the contracting authority in any of the following tasks (the specific tasks to be implemented are specified in the expert contract):

- assessing applications for EU funding (including prizes and tenders)
- monitoring of EU funded projects and contracts
- opinions and advice on specific issues

Tasks may include evaluation, monitoring and advice of different types (*such as evaluation of applications, observing evaluation procedures, project reviews, coaching activities, ethics reviews including checks and audits, etc*).

Generally, this involves the following:

- **reading and analysing** the background information
- participating in the expert **briefing(s)** (meeting(s) or webcast briefing(s))
- participating in **meeting(s), on-site visit(s)** and **interview(s)** (if any)
- drafting and submitting **report(s)** and other **deliverable(s)** (if any)
- provide any other type of assistance to the granting authority.

The precise scope of the work will be determined by the granting authority and may include other specific tasks, such as rapporteur or chairperson tasks.

2. Purpose, objectives and scope

Evaluators

Evaluators assist in the various stages of the evaluation of proposals, applications and tenders (*such as evaluating the proposals, acting as a rapporteur, responsible for drafting the consensus report (CR) of a consensus meeting, chair, or vice-chair at consensus discussions or meetings of panels of evaluators, or assisting as observer*).

Observers assist the evaluation process to perform an independent quality check. For this purpose, they must examine the way in which the evaluators apply the evaluation criteria, verify compliance with the procedures set out in the applicable rules and give advice on how the evaluation procedures could be improved.

Monitors

Monitors assist in the follow-up of the implementation.

They may be tasked with with specific tasks (*such as project reviews, progress meetings, mid-term reports, etc*) or follow projects over a certain period (*such as business innovation coaches, etc*).

Project reviewers must in particular assess:

- the degree to which the work plan has been carried out and whether all deliverables, if any, were completed

- whether the objectives are still relevant
- how resources were planned and used in relation to the achieved progress, and if their use respected the principles of economy, efficiency and effectiveness
- the management procedures and methods of the action
- the beneficiaries' contributions and integration within the action
- the expected potential impact, and plans for using and disseminating results.

Business innovation coaches must in particular provide coaching, including organisation and cooperation development support, to equip SMEs with methods, tools and skills that improve their capacity for strategic decision-making, building a performing organisation and negotiating with investors and new business partners to ensure long-term growth. The coach must:

- take stock of the status quo (*i.e. position on the market, market potential, responsiveness to change, strategy, organisation, management, financing, resource development, human potential, partnership building, challenges, etc*)
- examine the objectives, strategy and challenges and discuss them with the SME
- establish — together with the SME and with the support of the Enterprise Europe Network key account manager (EEN-KAM) — a coaching plan, to overcome the biggest challenges (and especially those which concern the commercialisation of the innovation that received the grant)
- implement the coaching plan (and review and, if needed, adapt it regularly to maximise its impact).

Other experts

The EU also engages various other types of experts (*such as ethics experts, gender experts, financial experts, policy experts, etc*) to assist with more in-depth expertise in specific areas.

Thus, *ethics experts* must, for instance, examine whether the action implementation complies with the required ethical standards and the applicable EU, international and national law set out in the grant agreement or procurement contract, and in particular that:

- it does not concern activities carried out outside the EU which are not allowed within the EU
- the ethics requirements set out as deliverables in Annex 1 (if any) have been fulfilled and
- the beneficiaries have all the necessary opinions, notifications or authorisations required under national and/or EU law.

Policy experts engaged to help in *expert groups* assisting the Commission with the implementation, evaluation or design of EU funding programmes must analyse the current situation, the rationale and objectives of the EU programme and formulate recommendations on how to better implement an existing or new programme.

3. Security obligations

In case the experts must deal with EU-classified information, they will be briefed on the security rules and the relevant security standards and guidelines.

The experts must:

- respect the security rules for protecting EU-classified information as laid down in Decision 2015/444 on the security rules for protecting EU classified information¹
- handle classified information as laid down in Decision 2019/1961 on implementation rules for handling CONFIDENTIEL UE/EU CONFIDENTIAL and SECRET UE/EU SECRET information², Decision 2019/1962 on implementing rules for handling RESTREINT UE/EU RESTRICTED information³ and Decision 2021/259 on implementing rules for industrial security with regard to classified grants⁴
- acknowledge in writing their responsibilities with regard to protecting such information
- present, where relevant, a valid personnel security clearance at the appropriate level to the contracting authority and the European Commission Security Authority
- inform the contracting authority services without delay of any potential security breach and/or compromise of EU-classified information.

4. List of ineligible expenses

The following expenses will NOT be reimbursed:

- expenses incurred for purchasing equipment or other material needed to accomplish the expert tasks
- expenses already declared under another EU contract or grant (including grants awarded by an EU Member State, non-EU country or other body implementing the EU budget)
- reckless or excessive expenses
- deductible VAT
- currency exchange losses.

¹ Commission Decision (EU, Euratom) 2015/444 of 13 March 2015 on the security rules for protecting EU classified information (OJ L 72, 17.3.2015, p. 53).

² Commission Decision (EU, Euratom) 2019/1961 of 17 October 2019 on implementing rules for handling CONFIDENTIEL UE/EU CONFIDENTIAL and SECRET UE/EU SECRET information (OJ L 311, 2.12.2019, p. 1).

³ Commission Decision (EU, Euratom) 2019/1962 of 17 October 2019 on implementing rules for handling RESTREINT UE/EU RESTRICTED information (OJ L 311, 2.12.2019, p. 21).

⁴ Commission Decision (EU, Euratom) 2021/259 of 10 February 2021 laying down implementing rules on industrial security with regard to classified grants (OJ L 58, 19.2.2021, p. 55).