GreenFORCE

Foster Research Excellence for Green Transition in the Western Balkans

Terms of reference

Research and Data Gathering for Mapping Green Transition in Western Balkan Countries:

Kosovo, Montenegro and Bosnia and Herzegovina

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| --- | --- |
| Grant no: | 101059411 |
| Type of action: | HORIZON Coordination and Support Action (CSA) |
| Project start date | 01/07/2022 |
| Project end date | 30/06/2025 |
| Cordis link | https://cordis.europa.eu/project/id/101059411  |

Version History:

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Main author/s | Summary of changes |
| V0.1 | 01/11/2022 | Co-PLAN | Document creation |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Quality Review:

|  |  |  |
| --- | --- | --- |
| Activity | Name | Date |
| Prepared | Co-PLAN | 01/11/2022 |
| Reviewed |  |  |
| Revised |  |  |

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# List of Abbreviations

**CBA:** Cost benefit analysis

**GT:** Green Transition

**RAB:** Research Advisory Board

**WB:** Western Balkan

**WP:** Working Package

# 1. Introduction

GreenFORCE aims at fostering excellence in the "Western Balkans' green transition" scientific research and innovation of Co-PLAN (Albania), CEA (North Macedonia), and UB GEF (Serbia), as a means to enhancing their research profile, strengthening research and management capacities of their staff, and contributing to convergence between Western Balkans (WB) and EU research capacities, as well as to wider policy initiatives for the WB region. This objective is reached through the twinning partnership of five organisations that will work closely to produce territorial knowledge through exploratory research and institutional learning; will transfer and exchange knowledge among partner organisations through applying the knowledge management cycle; and will engage in networking for sharing, cross-fertilizing and amplifying knowledge at the societal level. Ultimately, the ambition is to transcend from individual learning to enabling institutional learning, making sure that research and research management practices become institutionalised within the recipient organisations. GreenFORCE will contribute to the impacts of the destination "Improved access to excellence" by enabling pathways of cooperation, exchange, co-design, co-creation with academia, civil society and policy-makers at the regional level.

The 5 partner organisations are: Co-PLAN, Institute for Habitat Development in Albania as the coordinating partner; University of Belgrade – Faculty of Geography (UB-GEF) in Serbia and Center for Economic Analysis Association (CEA) in North Macedonia, as the two regional partners; and Nordregio, a pan-Nordic research organization based in Sweden, together with Politecnico di Torino, Italy (POLITO), as the leading EU research institutions. POLIS University in Albania is the affiliate partner of Co-PLAN.

WP4 - Assessing just green transition impacts and costs in the WB, entails the research component of this twining project, focusing on measuring and assessing impacts and costs of a just green transition in the WB. The EU Economic and Investment Plan for the WB includes a green agenda for the WB, with pillars to be pursued for transitioning towards a carbon-neutral economy. Such a shift will surely challenge the economies and societies in the WB. The social and policy context is yet fragile to allow for development and mass distribution of green transition technologies, while human resources are not prepared and/or are insufficient to produce and implement innovation. Yet, green transition also paves the way towards new development and resilience opportunities. The research will inform on the readiness/potential of societal actors (industry, academia, policy makers, civic society) to embrace the pathways to transformation, and will propose a framework for continuous monitoring of impacts and costs.

# 2. Objective

Under this framework, Co-PLAN is seeking for local partners/consultants in the three countries – Kosovo, Montenegro and Bosnia Herzegovina – to support the work of Co-PLAN to ‘**Assess just green transition impacts and costs’** in the respective territories of two out of the three countries of Kosovo, Montenegro and Bosnia Herzegovina. This assessment should show *how a certain sector, policy, territory, industry, etc. is transforming to contribute to just green transition* for climate change adaptation and mitigation (decarbonisation, less pollution, less waste, etc.) and *what impacts (social, economic and environmental) does this transformation manifest on the society on short and long-term*.

# 3. Scope of Works

The scope of works is related to two main tasks under WP4: T4.1 Conceptualise Green Transition in the Western Balkans and T4.2 Mapping Green Transition.

Unfolding green transition in the WB and measuring and assessing impacts and costs of a just green transition in the WB is the main objective of the WP4. The Green Agenda for WB already provides the strategic direction for the transition, but the steps to implement it are to be tailored to the territorial, societal and institutional context, and account for their impacts. Most WB transition efforts are currently noted in the field of energy, where some of the major obstacles lie, but less so in climate change, biodiversity, circular economy, etc.

Assessing just green transition impacts and costs in the respective territories of Kosovo, Montenegro and Bosnia Herzegovina, is the main and first objective of the work to be done under this assignment. The research should show how a certain sector, policy, territory, industry, etc. is transforming to contribute to green transition for climate change adaptation and mitigation (decarbonisation, less pollution, less waste, etc.) and what impacts (social, economic and environmental) does this transformation has on the society on short and long-term.

The contribution should relate to one of the 5 pillars (or relevant sub-pillars) stated in the Western Balkan Agenda on Green Transition:

1. Cleaning energy sources & protecting the climate
2. Moving to a circular economy
3. Depolluting air, water, and soil
4. Building sustainable agriculture & food systems
5. Protecting biodiversity and ecosystems

The research may be a desk research, surveying, and/or a case study focusing on:

1. a policy (sectorial)
2. spatial/urban planning policy/planning instrument
3. regional development policy
4. one specific territory (urban, rural or a resource such as forests, wetlands and lagoons, coastal area, or river transformation, etc.)
5. one industry or business initiative (cement, waste treatment, energy production, circular processes or lines of production in agriculture, etc.)
6. one specific urban component (energy efficiency in old buildings, public transportation, public space transformation through nature-based solutions, deliveries’ transportation, etc.)
7. a [public] service - any of the utilities.

The form of the assessment is expected to be either an ex-post assessment of a green transition process that has ended or is under implementation; or an ex-ante assessment of an issue that needs to transit (including a scenario-based component). In any case, the research shall abide by RRI principles (Responsible research and innovation) and include a counterpart from the quadruple helix sector, who will be institutionally engaged in the topic/research at hand.

A preliminary mapping of territorial stakeholders, policies/strategies; and initiatives on the specific topic will be also conducted, as prerequisite and background for the research work. This would be the second objective of this assignment. The mapping is a key task for the research, contributing to initial data gathering and the refinement of the research proposal, and to the sub-question on the identification of sectors and territories affected by the transitions and current progress of transition practices. Under this assignment each consultant will do the mapping for their own country.

The mapping frame will be given by Co-PLAN and will contain the type of information to be collected, the standardization of data-entry, and the tailored instruments to be deployed for accessing information. The latter include desk research, targeted meetings with actors/sectorial initiatives, and site visits (incurring local travel costs)

to observe activities and territories that are/should be subject to transition. This is a participatory mapping, engaging local stakeholders and communities to reveal local knowledge. Each local partner/consultant will produce the respective country report that will feed the final regional report to be prepared by Co-PLAN.

# 4. Scope of Services

The main tasks of the local partners/consultants will be to support the work of Co-PLAN to assess just green transition impacts and costs in the respective territories of two out of the three countries of Kosovo, Montenegro and Bosnia Herzegovina.

For this purpose the interested parties should prepare a short research proposal, 400- 500 words, addressing the issues below:

* *General context/Introduction:* A short description of the case and the current state of affairs in relation to it; show to each pillars/target in the WB green agenda does the case contributes to; the socio-economic context against which the case is being developed; environmental concerns surrounding the case; the stakeholders’ need for change/transition: refer to government plans, stakeholders’ statements or positions, etc.
* *Scenario development:* Describe the transition scenario/s that you will assess. It may be one single scenario or more than one – up to you as long as you justify your choices. The scenario should be clear enough and indicate what are its components, to be assessed for their impacts. The scenario should indicate its timeline and the territorial scale of its implications. If you need to provide a time phasing of the scenario and its implications, please do so.
* *The objective and methodology of research*: Provide the overall objective of your specific research, time and territorial scope. Include the specific central research question and any sub-questions.
* *List the research methodology and instruments you are using:* Single case study research (explain how), Scenario-based, and Benefit-Cost Analysis: Desk review, secondary data, content analysis, observation, survey, open-ended interviews, focus-group discussions, etc.

The second assigned task to the local partner/consultant shall be the preparation of the preliminary mapping of territorial stakeholders, policies/strategies; and initiatives on the specific topic as prerequisite and background for the research work. The mapping is a key task for the research, contributing to initial data gathering and the refinement of the research proposal, and to the sub-question on the identification of sectors and territories affected by the transitions and current progress of transition practices. Under this assignment each consultant will do the mapping for their own country.

# 5. Cost of Services

The total available budget foreseen for this assignment is €20,000, that will be divided equally for each of the local partners/consultants that will be selected to support the work in the two out of three countries of Kosovo, Montenegro and Bosnia Herzegovina. This budget consists in/covers personnel costs and local travel for data gathering.

# 6. Qualification requirements for the consultant

Local partner / consultant’s team is expected to conduct the mapping and support the research as described in points 3 and 4;

The local partner / consultant should be or have an expert(s) for green transition related topics (or professional researcher who is familiar with just green transition aspects) in the respective countries of Kosovo, Montenegro and Bosnia Herzegovina. It should be responsible and available for gathering the relevant data and preparing the mapping report and for supporting the research to be undertaken in the respective country.

General experience for main researcher / expert:

a. a Master or higher degree in environmental studies, urban planning, economics or other relevant field;

b. at least 10 years of professional research experience;

c. Fluency in English;

d. Excellent analytical and writing skills;

e. Good communication skills;

f. Previous experience of working on the green transition related topics;

Specific experience to be an asset

-Experience and knowledge in cost benefit analysis;

-Experience in working with governmental institutions;

-Experience in working in the WB countries.

# 7. Deliverables

Within this assignment the local partner / consultant will prepare and submit the following deliverables:

**D 1. Mapping report and mapping data for the respective country**. The report and the mapping will be prepared as per the mapping toolbox, prepared by WP leader. The toolbox consists of three observation frames and one analytical frame. The frame will contain the type of information to be collected, the standardisation of data entry, and the tailored instruments to be deployed for accessing information.

**D2. Research proposal on assessing just green transition impacts and costs for the respective country**. The research should show how a certain sector, policy, territory, industry, etc. is transforming to contribute to green transition for climate change adaptation and mitigation (decarbonisation, less pollution, less waste, etc.) and what impacts (social, economic and environmental) does this transformation has on the society on short and long-term. The proposal should follow the structure and methodology prepared by the WP leader.

Beside these two deliverables the local partner / consultant will be asked to participate and contribute to the organisation of the co-design and co-assessment workshop that will take place in the framework of the conceptualisation of the green transition in the WB.

# 8.Award criteria

The best price-quality ratio is established by weighing technical quality against price on an 80/20 basis.

# 9. Application procedure

**The application must comprise a technical offer and a financial offer, which must be submitted in separate envelopes or through specific electronic post mail messages.**

1. **Technical offer**

**The applicant must send at** co-plan@co-plan.org **the technical offer that is composed by the following documents:**

* **Legal Entity File (LEF) – if applicable**
* CV of the Applicant.
* Copy of Diplomas, Certificates, Letter of References supporting the experience and qualifications declared on the CV.
* Copy of ID documents.
* The research proposal as described in point 4 - Scope of the service
1. **Financial offer**

The financial offer must be presented as an amount in Euro and must be submitted using the template Financial Offer as given in annex 1- Financial Offer.

# 10. Timeline / Due dates

Requests for clarifications – till November 23, 2022

Proposal submission – November 30, 2022, extended till December 11, 2022

Data gathering and preparation of the draft report – January 31, 2023

Finalisation of the research proposal – December 31, 2022