

ToR: procurement of professional(s) to carry out research, analysis and elaboration of the contents of two Policy Recommendations Brief documents

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Deadline for submissions: 3/03/2025
Timeframe: 18/03-18/05 2025



**Co-funded by
the European Union**

A. Background

The Comanage UE-funded project

This is an EU-Life Clean Energy Transition project aiming to develop transnational governance and a holistic integrated services framework supporting the sustainability of European energy communities.

The origin of this initiative was the evidence that citizen-led and public-participated energy community (EC) projects often struggle to take off and grow in the medium and long term due to a diverse range of barriers. In this context the COMANAGE project aims at developing and implementing an **Energy Communities Governance Framework** including a set of management integrated services and supporting mechanisms addressed to local public authorities to facilitate the growth and sustainability in the medium and long term of energy communities and other forms of citizen led initiatives. Main developed tools are:

- **Energy communities' governance toolkit** that provides mechanisms and integrated services to equip citizens, local, and regional governments with necessary tools for managing energy community projects. It is divided into five categories, offering essential resources for legal, technical, social, finances and communication aspects and it is available in English, Spanish, Catalan, Polish, and Italian languages.
- **Training program embedded in an open and free access e-learning platform** that aims to provide managerial knowledge to support public actors in managing the daily issues and more specifically the growth of public energy communities.
- **Decision Support System** (chatbot)

Sustainability, Exploitation and Replication of the project

By equipping local public authorities with a governance framework and a toolkit-set, the project will provide effective models allowing public-private partnership in the energy communities' sector. The final goal will be twofold:

- To ensure that energy communities projects already settled can take off and continue in the medium and long terms.
- To encourage and stimulate the uptake of new community-owned energy projects.

COMANAGE project will reach this goal by operationalizing a transnational network of experts, facilitators and knowledge/competence providers that will develop, test, and implement a set of targeted governance instruments, tools and integrated services to be provided to public authorities with the aim of addressing the previously identified governance challenges and barriers. On top of this, the project strategy will be tailored, tested and validated within three (3) Operational Integrated Service Hubs (OIS Hubs): **The Metropolitan Area of Barcelona (Spain), the Metropolitan Area of Krakow (Poland) and the Regional Area of Lazio (Italy)**.

The scale of implementation will be the Metropolitan area, to explore possibilities of developing policy frameworks models allowing inter-municipal cooperation and aggregation of small projects. The framework and its toolkit will present a high potential in terms of up-scaling and replicability. A network/board of metropolitan areas replicators/followers will be activated and engaged to explore and demonstrate replicability possibilities across the EU and beyond.

Specific foreseen Activity

Elaborate a two (2) policy recommendations brief document, with the following objectives:

- Provide national, regional, city and metropolitan governments with actionable information, suitable frameworks, knowledge and resources to navigate the governance process of establishing and managing energy communities.
- Create a set of practices and policy recommendations directed to practitioners and political representatives to foster replication of the ECG and encourage political willingness and leadership in establishing those.

With the present Terms of Reference (ToR), the Metropolis Secretariat General opens a call for tenders to carry out the full process of research, analysis and elaboration of the contents of the two (2) policy briefs within the context of the Comanage project's objectives.

B. Target audience of the tender

Private or public institutions, universities, think tanks, consultancies, groups of experts, academics, or individuals with proven experience in the analysis of **Renewable Energy transition, Energy Communities, Energy Justice and Energy poverty trends**, and specific knowledge of their dynamics and implications in Europe and at international level.

C. Expected deliverable: structure and contents

Two (2) separated Policy brief documents with thematic recommendations and good practices to be 2-4 pages in length (each document) which will provide actionable insights for local and metropolitan governments. Recommendations will consider the Comanage project developed governance framework and proven-efficient enabling tools to be replicated, scaled up and adapted to other national, regional or local governments.

Each brief will focus on one of the following main topics and will be framed around a key question to answer.

1. **Community Development for Energy Communities** – Exploring the role of collective action in energy transitions, this brief will examine how cities or metropolitan areas can help create inclusive and sustainable energy communities.
2. **Addressing Energy Poverty in Large Cities** – Analyzing the challenges of energy poverty in urban contexts and the opportunities for income generation, this brief will highlight effective policies and governance strategies to ensure energy access.

Each policy brief document will contain the following content:

- **Define the issue** – Establishing its significance, urgency, and relevance to metropolitan governance. (What? Why is it important to address it? Who is affected by the issue?)
- **Highlight recent developments** – Presenting key trends, policy shifts, and innovations in the field.
- **Examine government responses** – Showcasing actions taken by local and metropolitan governments.

- **Propose key questions** – Encouraging reflection and discussion among policymakers.
- **Consider multilevel governance** – Addressing the role of collaboration between subnational and national authorities.
- **Provide case studies** – Including small city examples from around the world that offer transferable lessons

Regarding the format, the document will be distributed answering each of these sections with the option to add separated boxes for specific subtopics, such as "European Governance" or others we might identify.

D. Deliverables* and deadlines

From the date of signature of the service contract expected by the 18th March 2025, the timeframe of the implementation of the service will be two (2) months, with the final date expected by the 18th May 2025 (eight (8) weeks)

Phases of the implementation:

Our key expectation for this provider is to condense, organize, and identify learnings from information gathered primarily by the COMANAGE project, from local municipalities we have collaborated with (three (3) pilot hubs, replicators from pilot hubs and the COMANAGE Board of Replicators- 9 local administrations). This information will be completed with the information gathered from a benchmarking and out searching work based on the knowledge, contacts and resources coming from the provider. This will be implemented in three consecutive phases:

1. Time to read and understand the information provided by the Comanage project and gather new information from the out searching conducted by the provider.
2. An analysis of all this information to identify common trends, shared challenges/solutions, and therefore recommendations for others- Benchmarking
3. Organizing this content into the policy brief format that will be practical, useful for the expected audience.

Deadlines

1. Review of available database sources, new data sourced from out searching along with the information gathered primarily by the COMANAGE project, from local municipalities we have collaborated with (three (3) pilot hubs, replicators from pilot hubs and the COMANAGE Board of Replicators- 9 local administrations)

Deadline: 2 weeks from signature

2. First draft of the two (2) policy brief documents.

Deadline: 4 weeks from signature

3. Final text of the report (maximum: 4 pages each Policy brief document).

Deadline: 8 weeks from signature

All deliverables must be submitted in English

E. Editing, layout and release

Metropolis will be responsible for the final editing and layout of the document in order to comply with the requirements of the project and the donor.

The policy brief documents will be prepared in the framework of the European project "COMANAGE Developing a transnational governance and a holistic integrated services framework supporting the sustainability of European energy communities". This project has received funding from the European Union's Life Clean Energy Transition 2021. The sole responsibility for the content lies with the authors. The content does not necessarily reflect the opinion of the European Commission. The European Commission is also not responsible for any use that may be made of the information contained therein.

F. Guidelines for applicants

Applicants must submit their tenders containing the following elements:

- Individual CV(s) of the professional(s) involved
- Proof of previous research experience on the thematic(s) of the tender
- Work plan considering the deliverables and deadlines specified in section D
- Methodology and tools foreseen to achieve the expected results
- Budget proposal (VAT included, if applicable)

Submissions must be sent via email, **no later than 3 March, 2025 at 23:59 CET**, to Mr. Daniel Pelufo (dpelufo@metropolis.org), Programs Officer at the Metropolis Secretariat General.

G. Selection criteria

Proposals will be evaluated according to the following selection criteria:

Nº	Specific criteria (associated with the proposal)	Maximum grade (total 10)
1	Expertise and/or experience in: metropolitan governance on Renewable Energy transition, Energy Communities, Energy Justice and Energy poverty trends , data gathering and analysis, comparative reporting.	2
2	Overall technical quality of the proposal document and level of concreteness of the work plan	2
3	Relevance of previous research experience in Renewable Energy transition, Energy Communities, Energy Justice and Energy poverty trends in Europe	2
4	Clarity of the methodology and tools to achieve the planned results.	2
5	Budget	2

H. Basic documentation and data sources

- The Comanage project toolkit (as outlined in the introduction to this document).
- Metropolis databased gathered from different outputs coming from three Pilot Hubs (OIS) and 9 local authorities' members of the Board of Replicators such a case study presentations, minutes and recordings from online exchange meetings, and feedback collected through the gathering tools elaborated in the framework of Comanage project.
- Databased gathered from the consultant from benchmarking and out searching (Desk research).
- Information gathered from the structured interviews addressed to three (3) Pilot Hubs, most relevant replicators, EU experts and other relevant stakeholders conducted by the consultant