**Annex 2\_Tender tasks, timeline and deliverables**

The preparation of Transitional Plans (TP) will rely on the multi-level perspective[[1]](#footnote-2) approach for planning sustainable transitions, which will be refined for the needs of Bosnia and Herzegovina.

Annex 1 of the Transitional Plan will be an operational 3-year plan with short-term measures, that will be the subject of the adoption at the local council.

The SEI is looking to engage a consulting team (the “Consultant”) to support the preparation of Transitional Plans in four local self-government units in BiH – Banovici, Breza, Ugljevik and Zivinice within the area of energy and climate change.

SEI has implemented preparatory activities, including 1) obtained local decisions on the intentions of LSGU to participate in the project and 2) local decisions on the establishment of planning teams, 3) stakeholder mapping, 4) collected relevant local documents, 5) prepared draft baseline assessments-situation analysis, 6) conducted visioning exercise and initial stakeholder engagement.

The experts are expected to closely collaborate with the SEI thematic experts (that will provide advisory services per area), SEI Programme Manager and Senior Programme Coordinator (located in Sarajevo). SEI also has contracted a local partner (consortium CENER 21-Enova) that will support logistical arrangements and organization and provide support where needed with the compilation or collection of documents.

**Scope of work**

1. **Initiation**

During the initiation phase, the first 7 days after the contract signing, the following tasks are envisaged:

* 1. the Consultant will familiarize themselves with the Methodology and with what has been done so far, in the inception phase:
     + the draft baseline assessment prepared based on the existing official documents.
     + the minutes of the meeting from the visioning exercise events.
     + the draft stakeholder mapping.
  2. Attend a joint meeting between SEI, local governments, and LP; the meeting will last one day and be held either in Sarajevo or in Tuzla; during the meeting, the preliminary plan and the stakeholder engagement approach will be discussed.

The main output of this phase will be the 1) preliminary work plan and the 2) plan for stakeholder engagement. The outputs will be prepared jointly with SEI and coordinators form the partner local governments.

1. **Drafting the Transitional Plans** 
   1. **Support to LSGUs to establish (and run) working groups:** This activity involves consultations with coordinators form the local governments and the establishment of Working Group (WG) for the Energy and Climate Change for the deeper analytical work. Five working groups are envisaged, reflecting priorities of the Green Agenda for the Western Balkans. Working Group Lead will be in charge for collaboration with team members, assignment of tasks and follow-up, as well as regular communication and coordination. If needed, the SEI will develop Term of Reference for the Working Group as part of this activity.
   2. **Mapping the Transition Landscape**

The main objective of this activity is to map and analyze international, regional, national, and local obligations, policies, strategies, and legislations that could be supporting or hindering the sustainable transition.

This mapping will encompass the following subtasks:

* + 1. An overview and summary of relevant international/BiH/entity/cantonal/local documents/policy framework for the areas within the scope of this procurement. The overview should provide relevant context, emerging issues, the strategic direction of BiH/entity in the area, trends, and forthcoming policies, as well as any indication of technological preferences/approaches in the area and scenarios/modeling used.

The summary will be available as a separate document, while the Transitional Plans should show the harmonization with other relevant strategic documents. It is important to seek complementary socioeconomic aspirations (e.g. goals and targets related to innovation, education and skills, health, equity considerations, etc.), or define them during the preparation of pathways and options (Chapter 2.4)*.* SEI will support the identification of relevant documents regarding socio-economic aspirations. Additionally, SEI has already collected majority of requirement documents, that the Consultant will supplement. The Consultant should be explicit when working/using documents that are not officially adopted (draft phase).

* + 1. A half-day participatory session led by SEI - mapping the mega trends. It should encompass mapping and understanding the long-term political and economic environment. The OECD has identified megatrends fitting into three categories: technological change, demographic change, and environmental change. Other megatrends include increasing urbanization, risks of pandemics, challenges posed by barriers to continued economic growth, and similar. For example, megatrends indefinite for EU can be found here: <https://ec.europa.eu/assets/epsc/pages/espas/chapter1.html>.
  1. **Review and Supplementation of a Situation Analysis**
     1. SEI has prepared a draft situation analysis based on available data and documents. The Consultant should review and broaden the technical assessment of relevant sectors, where/if needed, including the establishment/selection of relevant indicators. The baseline assessment should also reflect the links between environmental/sectoral issues and relevant provisioning systems and behaviors and social norms that influence available choices.
     2. Review of the visioning exercise and drawing up elements for preparation of development pathways.
  2. **Preparation of Transitional Pathways and Stakeholder Consultations**

The main objective of this activity is to prepare a transitional pathway, that outline one or more “paths” that a partner LSGUs can take to get from ‘Point A’ (the current states of things) to ‘Point B’ (a desired future state - vision). Pathways help outline what needs to be considered, and what will matter, when assessing whether a given idea or concept is capable of getting us from A to B, identifying what barriers or factors need to be considered or addressed when opting to pursue a particular goal.

The Consultant will contribute to Transitional Pathway from the scope of this procurement, showing how decarbonization as one of the priorities of the Green Agenda will contribute to the systematic change in selected LSGUs.

This task will be led by SEI experts, while the consultants will provide inputs for the Transitional Pathway document, as well as participate in the meeting to reach a consensus about it.

* + 1. Selection of one or more foresight methods, application and preparation of the alternative futures and pathways. The selection of methods should consider existing modelling and scenario development exercises identified under 2.2.1, and it will be done together with SEI experts.
    2. **First Stakeholder Consultations** aimed tocollect views from both internal and external stakeholders on the current situation, but also to discuss the possible pathways. A wide range of local and regional participants should be considered for invitation to the workshop including NGOs, universities, and research institutions with expertise relevant to sectors covered. The Consultant will prepare the agenda together with other WG leaders and based on pre-existing stakeholder mapping and engagement plan (look at Chapter 1 of this document). The Local Partner will be in charge of the logistics and invitations. The stakeholder consultations should be organized as a daily hybrid event. Public consultations on selected pathways, that should open the possibility of comments and additional inputs for interested public and experts after the event itself. Local Partner will be in charge to compile the comments, and to communicate with experts in case additional clarifications are needed. Local Partner will also compile the feedback after the consultation period on Transition Pathways.
  1. **Prioritization, development of measures and activities** 
     1. Baseline assessment, stakeholder consultations and selected transitional pathways will refine and show priorities, and the next step will be to define measures for long-term (until 2050), medium-term (2035) and short-term (3 years) measures and activities that will be part of the Operational Plan. Measures should broadly consider the funding of innovation, environment and climate, investments, and integrated economic and social measures.

Some pre-defined[[2]](#footnote-3)areas to be taken into account when developing measures are presented below:

* Air pollution, monitoring and management
* Emissions bassline - decrease of emissions
* Energy diversification and alternatives to fossil fuels
* Low carbon district heating
* Community energy, increasing access to renewable energy for public sector, households, businesses; confidence-building measures to encourage consumers to turn more to renewable energy
* Exploring the potential of biomass and other alternative fuels
* Energy efficiency (building sector, public, private, industry and businesses)
* Social dimensions of transition – addressing just transition, energy poverty
* Introduction/promotion of emission and energy standards
* Climate adaptation strategies
* Favorable investment for energy and climate solutions (access to funding, planning, new instruments)
* Transport sector and smart mobility - greener and more sustainable transport network, multimodal transport solutions and modal shift
* Innovative solutions could challenge some of these consumption patterns

Development of measures will need intense work in working groups, and organization of this work will be left to the discretion of the Consultant, in agreement with Senior Programme Coordinator and the Local Partner. The Consultant will have a close cooperation with the SEI thematic experts within working group areas.

Development of the measures should ideally be done in two iterations (2 drafts) The consultant should draw and prepare a longer list of measures that will be communicated with the stakeholders and the LSGU and refined based on the feedback.

These actions can be presented in a table providing an overview of how activities are links to measures. Beyond the table, each action should have a detailed description and analysis consisting of, but not limited to:

* + Estimated annual implementation and capital expenditure costs per measure;
  + Key stakeholders for implementation (and their roles and responsibilities);
  + Potential sources of finance including the municipal budget, national government, IFIs, donors and the private sector;
  + Estimated cost of pre-investment (feasibility and impact studies, etc.);
  + Indicative implementation and operational timeline;

For the details, please consult the Annex 5\_Draft of the Transitional Plan.

This detailed list of actions should be reviewed a second time by the LSGU and its stakeholders to affirm their commitment to the scope of activities identified through the TP.

Short-term measures should be worked out at the activity level, which will be connected with the corresponding measures, deadlines, expected results, responsible parties, and financial allocations and sources.

* + 1. **Second Stakeholder Consultations**, with the aim to refine the 1st draft of measures and corresponding activities for short-term measures, and work towards the second and final draft. The Local Partner will be in charge of the logistics and invitation.

1. **Finalization of the Transitional Plan and adoption of the Operational 3-year plan (2025-2027)**

Once complete, the final ‘short-list’ of actions can be integrated into the Transitional Plan and it’s 2025-2027 Operational plan.

The Consultant should support the LSGU through the approval process for the TP. This can envisage support to public disclosure/consultations, a summary of the received comments, and revision of TP, and the presentation to LSGU council.

1. **Capacity building**

The Consultant will provide training and capacity building for LSGU officials, as well as other stakeholders who may be implementing actions included in the TPs. Capacity building should aim to provide necessary skills and knowledge for implementing bodies in order to support the implementation and management of sustainable transition actions.

This training and capacity building will take the form of at least three webinars. The Consultant is expected to contribute to one of them. SEI will be in charge of preparing the agenda together with the Consultant, while the Local Partner will be in charge for the logistics and invitations.

Topics will be agreed with the LSGUs, but they should 1) cover the planning for sustainable transitions, data collection and niche knowledge and new EU legislation and trends, 2) present good practices from other countries, and support networking and knowledge exchange.

1. **Preparation of a final report for the SEI**

The Consultant is expected to reflect on the process taken in developing the TPs. The Consultant will prepare a Final report that identifies lessons learned for the production of the TPs and further discusses future improvements concerning the Methodology.

**Deliverables**

In summary, the following indicative timeline is allocated to before-mentioned deliverables.

|  |  |  |  |
| --- | --- | --- | --- |
| Task | Sub- task | Deliverable | Tentative Date |
| 1 |  | Preliminary Work Plan | December 2023 |
|  |  | Preliminary Stakeholder Engagement Plan | December 2023 |
|  |  | Attending joint meetings with LSGUs and other experts | December 2023 |
| 2.2 | 2.2.1 | An overview and summary of relevant international/BiH/entity/cantonal/local documents/policy framework | January-February 2024 |
|  | 2.2.2 | Mapping the megatrends (participatory event) | February 2024 |
| 2.3 | 2.3.1 | Finalization of the situation analysis | January-February 2024 |
| 2.4 | 2.4.1 | Preparation of pathways | March 2024 |
|  | 2.4.2 | Consultation of pathways | March 2024 |
|  | 2.5.1 | Prioritization, development of measures and activities (1st draft) | January-April 2024 |
|  | 2.5.2 | Second Stakeholder Consultations | May 2024 |
|  | 2.5.3 | Development of measures and activities (2nd draft) | June 2024 |
| 3 |  | Transitional plans prepared including Operational 3-year plan | September 2024 |
| 3 |  | Summary report from public discussion/disclosure | September 2024 |
| 4 |  | Three webinars delivered | May, October, November 2024 |
| 5 |  | Final report | December 2024 |

1. Please consult these two publications: <https://www.eea.europa.eu/publications/sustainability-transitions-policy-and-practice>

   <https://ec.europa.eu/regional_policy/sources/studies/report_sust_transit_en.pdf> [↑](#footnote-ref-2)
2. By the Green Agenda for the Western Balkans, and EU Green Deal [↑](#footnote-ref-3)