



Terms of reference (ToR) for knowledge, communication and advocacy work supporting a fair and effective ETS2 in Spain

LIFE23-GIC-BE-LIFE EFFECT
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1. Background

Carbon Market Watch (CMW) is looking for a service provider to implement knowledge, advocacy and communication activities in the Spanish context related to the EU's Emissions Trading System for road transport and buildings (ETS2) as part of the LIFE Effect project. Activities will promote socially fair and environmentally effective carbon pricing through the engagement in the Spanish process of EU ETS2 implementation.

ETS2 will apply carbon pricing to road transport and buildings, which are responsible for 40% of the EU's total carbon emissions. The scheme is set to start in 2027. While fuel distributors will bear the regulatory obligations, the impact of price increases for everyday activities like driving and heating homes will likely fall on final consumers. To alleviate the expected impact on society, the Social Climate Fund (SCF) has been established to protect vulnerable households. While decarbonisation is essential, the LIFE Effect project raises awareness and engages with civil society and other stakeholders to ensure ETS2 and SCF implementation is just and effective.

2. Carbon Market Watch and LIFE Effect

CMW serves as the project coordinator of LIFE Effect and is leading project management, advocacy and communications activities of the project. The organisation is an independent NGO with a unique expertise in carbon pricing. CMW's mission is to ensure that carbon pricing policies help tackle the climate crisis and drive a just transition towards sustainable societies. We promote effective and fair climate action founded on human rights that empowers communities to participate in decision-making processes related to climate policies.

LIFE Effect aims to improve the knowledge, capacity and networking of civil society on the issues related to the EU ETS2 and the SCF, to enhance the implementation and development of fair and effective carbon pricing policies. Additionally, the project will raise awareness and understanding of these topics among EU citizens, promoting much-needed climate action in a manner that is socially fair and environmentally impactful. The specific project objectives are:

1. By 2027, key target groups (CSOs, government & progressive industry) across the EU-27, are networked with leading experts, and through a scientific evidence base and capacity building, have an improved ability to credibly assess the functioning of the EU ETS and its

related policy instruments, providing a foundation to build political support for socially just and environmentally ambitious emissions trading in the EU.

2. By 2027, the implementation and next legislative review of EU ETS (including ETS2, SCF, and first NSCPs) have been demonstrably influenced towards environmentally ambitious, socially just measures, through enhanced knowledge-sharing, collaboration, and joint advocacy of target European climate and social CSOs at EU and national level, directly in seven EU member states and indirectly in at least seven additional countries.
3. By 2027, project communications, campaign and dissemination of outputs reaches and promotes engagement of a million EU citizens, representatives from civil society and key stakeholder groups, and supports Pan-European and neighbourhood replication.

The project receives funding from the European Union's LIFE Programme under grant agreement LIFE23-GIC-BE-LIFE EFFECT and is implemented in the period from July 1, 2024 to June 30, 2027 by a consortium of nine partners, including Carbon Market Watch (CMW), Asociace pro mezinárodní otázky (AMO), Bond Beter Leefmilieu Vlaanderen (BBL), European Environmental Bureau (EEB), Fondazione Think Tank ECCO (ECCO), Germanwatch (GW), The Green Tank (GT), Associação Sistema Terrestre Sustentável (ZERO) and Związek Stowarzyszeń Polska Zielona Sieć (PGN).

3. Project tasks and service provider contributions

The service provider will carry out knowledge, advocacy, and communication activities related to the EU ETS2, tailored to the Spanish context. These activities will contribute to the project's objectives by promoting and strengthening the implementation of current legislation, while extending outreach to Spain, where the consortium has no direct representation. The services will support the implementation of the following project work packages: WP2 (developing a knowledge base), WP5 (improving the functioning of the EU carbon market), and WP8 (communication, visibility, and dissemination).

3.1 WP2: Creating a knowledge base

Work package 2 (WP2) delivers an improved scientific knowledge base on the EU ETS, especially the EU ETS2 and the Social Climate Fund, which will be disseminated to CSOs, academia, the media, progressive industry and decision-makers at EU-level and in selected member states.

Under Task T.2.5 of the grant, our consortium partner Germanwatch will deliver a report on revenue use for social justice and climate neutrality in the context of Social Climate Fund and ETS2. The report will examine the allocation and use of ETS 1 auctioning revenues, especially during the period between 2020 and 2024 in selected countries, identifying instances where funds were misused, inefficiently spent, or diverted from climate-related objectives. It aims to explore lessons learned and recommendations that can be applied in light of emerging opportunities under the ETS2 revenues and the SCF and will comprise additional national case studies from selected member states with policy recommendations to ensure the effective and equitable deployment of ETS2 revenues.

The service provider is expected to develop a brief case example related to the Spanish context for task T.2.5. This case should focus on recommendations for the effective and equitable spending of resources under the ETS2 revenues and the SCF, overcoming pitfalls of ETS1 revenues by member states. The case example will support national-level advocacy efforts and will inform European outreach related to Germanwatch's report regarding T.2.5.

3.2 WP5: Improving the functioning of the EU carbon market

Work package 5 (WP5) of the LIFE Effect project will deliver a tailored advocacy support package (incl. advocacy guide, strategy, framework for national-level advocacy). This will enable EU and national level CSOs to engage with consistent messaging in a variety of advocacy activities linked to the EU ETS, including joint positioning and engagement with policy processes and decision makers at EU and national level. At least 200 policymakers shall be reached through the work package by briefings, letters and meetings.

The work package will promote the effective implementation and potential review of the ETS2 in a way that ensures high environmental integrity and fair and adequate support for European citizens in the transition, supporting EU policies across buildings and transport sector decarbonisation and improving the functioning of the EU carbon market.

The service provider is expected to implement a variety of advocacy activities in the Spanish context by targeting Spanish policy and decision makers and CSO, on national and EU level. These activities will mainly contribute to the following work package tasks (all led by CMW):

- Task T.5.2 – Development of an advocacy strategy to inform (EU- and national-level) outreach to policymakers for strengthening the EU ETS Directive in light of the EU's upcoming agreement on a 2040 climate target
- Task T.5.3 – Policy monitoring and development of national position papers and policy recommendations (supporting implementation of the existing EU ETS Directive at national level)
- Task T.5.4 (minor contribution) – Analysis and development of two sectoral policy briefings (to ensure impactful implementation of the existing EU ETS Directive)

While the expected outputs are described in the next chapter, the following contributions are expected by the service provider under the work package:

- Support the consortium's advocacy by conducting national-level policy monitoring and analysis on the national government's progress on implementing ETS2, sharing updates on political developments and advocacy opportunities as well as by positioning and disseminating project messages.
- Develop EU and national-level advocacy and political outreach contributing to fair and effective carbon pricing and strengthening the ETS2 and its national implementation in light of the 2040 target, including engagement with project advocacy materials, coordination of meetings and engagement with policy makers and CSOs, production and dissemination of policy materials, direct participation in policy processes and media outreach.
- Actively participate in the consortium's monthly policy and advocacy meetings, providing updates as needed, and conduct a brief qualitative analysis of advocacy impacts towards the end of the project.

3.3 WP8: Communication and dissemination

Work package 8 (WP8), led by CMW, covers the project's general communications and dissemination activities. It conveys the activities, results and recommendations of LIFE Effect to relevant audiences and stakeholders. The work package maximises project visibility, raises awareness of EU carbon pricing and creates deeper engagement with key target audiences across

the EU. Communication and dissemination activities under WP8 are primarily targeted towards two key groups:

- 'Key technical audiences', including policymakers and politicians, civil society organisations, academics and researchers, and journalists. At the national and EU-level, the project targets, raises awareness of and engages with these audiences. They are informed, mobilised and provided with a better understanding of EU ETS2 and SCF and related improvements.
- 'EU citizens', including affected voters and residents, citizens and grassroots groups. WP8 activities target half a million EU citizens, raising awareness of the ETS2 and motivating them to show their support for fair and effective carbon pricing. Communicating to these non-expert audiences involves adaptation and translation into national languages.

Communication outputs and content dissemination target these groups in a variety of different ways, e.g. through social media, media outreach, newsletter and mailings, events, meetings, and the project website (www.life-effect.org), which is available in each official language of project partners. Furthermore, work package activities support pan-European and neighbourhood replication of relevant project results and are complemented by a large awareness and action campaign targeting another half a million EU citizens under a different project work package (WP7).

The service provider is expected to implement a range of communication and dissemination activities that contribute to the expected results of WP8 and reach the relevant target groups. These activities should support national engagement, advocacy efforts and visibility around the project and its objectives, targeting both technical audiences and the wider public in Spain and contributing to the overall work package goal of reaching at least half a million EU citizens by 2027. Activities shall be guided by the project's communication and dissemination strategy and use the project's visual identity and branding. They will mainly contribute to the following work package tasks:

- Task T.8.4 – Targeted communications activities to raise awareness of project outputs and to inform and engage key audiences with project messages.
- Task T.8.5 – Dissemination of major project outputs to ensure that project messages are received by the appropriate audiences and stakeholders.

While the expected outputs are described in the next chapter, the following contributions are expected by the service provider under the work package:

- Develop tailored national communication content for a variety of channels, such as media, social media and website, to defend ETS2 and improve SCF implementation in the national context.
- Publish and disseminate communication about the key outputs delivered as part of the contracted tasks, tailored to project messaging.
- Actively participate in the consortium's monthly communication meetings and identify, share and make use of national communication opportunities for national and EU-level messaging to spread the project message.

4. Expected outputs

The service provider will be asked to produce various outputs in close consultation with CMW.

4.1 WP2: Creating a knowledge base

- A brief document with a stand-alone national case example (in English and Spanish) presenting recommendations for the spending of ETS2 revenues and SCF in the Spanish context (feeding into T.2.5), overcoming pitfalls in the allocation of ETS1 and linking these to precise ideas on how to reform the ETS directive.
- Putting forward recommendations from the report to relevant policy and decision makers and monitor and report recommendation uptake.

4.2 WP5: Improving the functioning of the EU carbon market

- Active participation in and regular updates via the monthly project policy and advocacy meetings and email list of the LIFE Effect project on the national Spanish political developments and advocacy opportunities related to ETS2 to support the project consortium's advocacy efforts, resulting in joint positioning and dissemination of project messages with national stakeholders and at the EU level.
- A national position paper (about five pages, English and Spanish) including policy recommendations on fair and effective carbon pricing and the implementation of ETS2 at

the Member State level in Spain, including strategic dissemination to policymakers and communication via owned channels with the service provider's network.

- At least two relevant outputs to defend ETS2 and improve SCF implementation in the Spanish national context at key moments such as an op-ed, joint letter to national government, position paper, FAQ, briefing or other in agreement with CMW, including strategic dissemination and coordination of said outputs.
- EU and national-level advocacy and political outreach contributing to fair and effective carbon pricing and strengthening the EU ETS2 and its national implementation in light of the 2040 target:
 - Engagement with the project's European advocacy guide, strategy and civil society priorities and the framework for national-level advocacy, providing feedback and disseminating with the service provider's network.
 - Conducting national and EU-level advocacy meetings and outreach with policy- and decision-makers to present the positioning of the consortium to defend ETS2 and improve the fairness of its implementation (on an ad hoc basis in time with key political moments), coordination with environmental and social NGOs (e.g. through relevant working groups, meetings and other relevant channels) and direct contact with journalists/media.
 - Direct participation in policy processes, such as the public consultation on the proposed review of the ETS directive upon the release of the proposal by the European Commission.
- A short feedback on the conceptualisation of task T.5.4 (two sectoral policy briefings) and dissemination of the outputs.
- A very brief qualitative analysis of the advocacy impacts of the service provider's work towards the end of the contract.
- Evidence and reporting of advocacy activities in the project's impact reporting register.

4.3 WP8: Communication and dissemination

- Active participation and regular updates via the consortium's communication meetings (usually monthly), including sharing brief verbal updates, in order to coordinate communication and dissemination activities.
- National media outreach in Spain, tailored to project messaging, including media outputs (e.g. press releases, op-eds, articles) and dissemination thereof.

- Communication outputs (e.g. articles or news reflecting the national perspective), tailored to project messaging, disseminated via the project website and national communication websites targeting audiences in Spain (e.g. the service provider's website, where applicable). In addition, the service provider will support the editorial process for the Spanish translation of the ETS2 online training materials provided by the consortium, to enhance accessibility and national outreach via the project website.
- Creating and sharing regular social media content, tailored to project messaging, disseminated via national social media channels targeting audiences in Spain (e.g. the service provider's social media accounts, where applicable).
- Creating and sharing newsletter content, covering key project messages from the national perspective, disseminated via the project newsletter and/or national newsletters/mailings targeting audiences in Spain (e.g. the service provider's newsletter, where applicable).
- Creation and dissemination of tailored communication content accompanying key outputs highlighted in this ToR (such as the T.2.5 report and the national case example contributing to it; the national position paper contributing to T.5.3; the two outputs defending ETS2 and improving SCF implementation; the two sectoral policy briefings under T.5.4 and any further advocacy outputs). Where relevant, this may also include media outreach.
- Evidence and reporting of communication and dissemination activities in the project's impact reporting register, including their audience reach.

The service provider is warmly invited to consider dissemination and translation opportunities in addition to the outputs listed above that contribute to the broader goals of the project in the Spanish context. These may be related to other advocacy, communication and project outputs, such as major reports from the project's knowledge base, information for public consortium events, the awareness campaign and advocacy and communication materials. Where such additions are proposed within the scope of the contracted work, they should be clearly described and strengthen the offer's contribution to project impact.

4.4 General notes

The service provider is encouraged to follow the suggested outline of outputs, considering the respective national context and the assigned budget. While the exact content of many outputs will depend on evolving project results and political developments, the service provider may propose any specifications and is encouraged to suggest the number of outputs, where applicable. Furthermore, adjustments (e.g. omission, addition or adaptation of specific outputs) may be proposed to address the national context and budget limitations better. Any such proposal must be

justifiable and remain consistent with the overall scope and objectives of the contracting.

The service provider's contributions should be embedded in a collaborative communication process, ensuring alignment with the consortium's strategy while responding to the respective national reality and up-to-date political developments.

Activities and outreach shall be targeted to key technical audiences and EU citizens as outlined in the work package description, with a strong focus on Spanish policy makers, CSOs and media. Activities shall be in line with the project's focus on fair and effective carbon pricing and improving ETS2 in this context. All outputs shall use the project's visual identity and branding as well as visibility of LIFE funding.

5. Timeline

The following timelines are indicative at this stage. The service provider shall briefly after signing the contract provide a proposed timeline with milestones for the delivery of the agreed outputs. This timeline shall be agreed upon with CMW during an initial launch meeting and may be adapted in consultation, provided that all final outputs are delivered no later than April 30, 2027.

Step	Deadline
Deadline for offers	17 September 2025
Start of the contract	Signature of the contract – T0
Kick-off meeting	Within 1 week after the signature – T0 + 1 week.
Implementation of tasks	Specific timing of output is agreed during the launch process. All outputs are delivered no later than April 30, 2027.

Note: The deadline for offers is fixed. The rest of the timeline is indicative.

6. Quality assurance, monitoring and reporting

For the duration of the contract, the service provider commits to working in close collaboration with the designated contact point(s) at CMW (and, where necessary, with partner organisations), following the requests and guidance offered by CMW staff and sticking to the agreed timeline. Quality assurance and monitoring will be maintained through a kick-off call, regular follow-up calls and e-mail communication between the service provider and CMW. The service provider can expect feedback on draft outputs by CMW.

Any changes to the agreed scope of work, including outputs and timeframe, must be agreed on in advance. CMW reserves the right to reject work that is of poor quality or does not meet the terms set out in this document and the subsequent detailed brief that the service provider will receive.

The service provider commits to not using generative AI to create any outputs. If it is discovered that generative AI was used, CMW reserves the right to withhold payment for the affected work until corrective action is taken. If this is uncovered after payment, CMW reserves the right to demand compensation or take legal action.

The service provider shall submit brief reports summarising the tasks performed, the outputs produced, and their contribution to project KPIs. This includes a short update after the implementation of the first services in February 2026 and a brief final summary upon the contract's completion. The provider will also make entries in the project's impact reporting register to track relevant output metrics.

7. Eligibility criteria

The service provider must meet the following eligibility requirements to be considered for this contract. Proposals that do not meet these criteria will be rejected.

- The bidder must be a legally registered entity able to enter into a service provision contract under applicable law.
- The bidder must not be bankrupt, under liquidation, or subject to administrative sanctions, and must not have been convicted of fraud, corruption, or other serious criminal offences affecting professional integrity.

- The bidder must have no conflict of interest in relation to the assignment.

8. Required skills and qualifications

The service provider should have demonstrable experience in knowledge, advocacy and communication work regarding climate policy and carbon pricing, preferably on ETS2 and SCF. Familiarity with Spanish and EU policies as well as access to relevant stakeholders in these contexts are expected. Additionally, appropriate project management skills, experience in working with NGOs and a proficient level of English and Spanish are required.

9. Budget and evaluation criteria

The budget shall not exceed **7,900 EUR VAT excluded**. Bidders must submit their financial proposal in EUR, net of VAT. Please refer to the VAT instructions for suppliers, by CMW.

All prices are exclusive of VAT unless otherwise stated. VAT will be applied according to Belgian and EU regulations. For suppliers outside Belgium but within the EU, the reverse charge mechanism for VAT may apply if both parties are VAT registered and the services fall under this mechanism. For suppliers outside the EU, VAT may not apply. The supplier is responsible for determining their VAT obligations in their country of origin.

The contract will be awarded on the criterion of value for money, i.e. the tender offering the best price-quality ratio will be selected.

10. Submission procedure

Applicants wishing to express their interest in undertaking this work are requested to email an outline evaluation proposal containing:

- Specification and reflection of the national context in relation to the project.
- Intended activities and outputs, including scope/frequency and focus.
- Methodology to be used.
- Suggested overview of time and activity schedule.
- Confirmation of the fulfillment of the eligibility criteria outlined above.

- Overall budget in EUR, including a cost breakdown by output categories (i.e. knowledge, advocacy and communication/dissemination work).
- VAT number and project reference (LIFE23-GIC-BE-LIFE EFFECT).
- Curriculum vitae of expert(s) leading and implementing the activities and evidence of relevant experience.

The selected applicants will be expected to conduct the work within the budget and timeline agreed – there will not be scope to extend the agreed budget and no liability to CMW for unforeseen costs.

Complete proposals should be no longer than 10 pages and submitted in pdf format through the following email addresses: project.coordinator@carbonmarketwatch.org, with the title “Tender: knowledge, communication and advocacy work on ETS2 in Spain”.

The deadline for submitting proposals is **17 September 2024, 24:00 (CET)**. Any late submission shall not be considered.