

Request for Proposals Fit for 55 Package Social Impact Review

Laudes Foundation seeks an independent research team for undertaking a review of the potential social¹ aspects and consequences of the European Union's (EU) law to reduce net greenhouse emissions by at least 55% by 2030, and in particular of the 'Fit for 55' package. Complete proposals must be submitted by October 11, 2021. More details are given below in the request for proposals. Key findings of the review will be published.

A. Introduction

Laudes Foundation is an independent foundation committed to advancing the transition to a just and regenerative economy. We do this by supporting brave action that will inspire and challenge industry to harness its power for good. Action that inspires industry, to work collaboratively to create solutions and tools. And action that challenges industry, holding it to account and incentivizing change. Founded in 2020, Laudes Foundation is part of the Brenninkmeijer family enterprise and builds on six generations of entrepreneurship and philanthropy. In particular, we advance the industry-changing work of C&A Foundation. As an organisation committed to learning, we work to persistently and collaboratively influence capital markets and transform industry, starting with the built environment and fashion industries.

B. Background and context

There is clear momentum to decarbonise through EU policies, recently demonstrated by Commission's commitment to reduce greenhouse gas emissions by at least 55% by 2030 and net zero by 2050, compared to 1990 levels.²

At Laudes Foundation we believe that we must work on the transition to a net-zero carbon economy by 2050 to avert a global humanitarian crisis posed by climate change but we can only be successful if we do it in a fair and inclusive way. We aim to work on this goal by:

- Working with civil society, business and policy makers to design and advocate for policies that would enable the transition to a net-zero carbon economy by 2050
- Through our partners, ensuring that the policies are accounting for and mitigating their social impact so that the transition is just and fair

C. Purpose and Scope

Through an evidence review accompanied by a brief analytic paper, Laudes Foundation would like to gain a deeper understanding of the gender and social impacts and

¹ 'Social' scope extending to human needs for security, education, work, health and wellbeing.

² https://ec.europa.eu/commission/presscorner/detail/en/IP_21_3541

considerations affecting “Fit for 55” proposals (including the new Social Climate Fund) and the trade-off between the different policies in the following areas:

- Gender and social impacts as well as gaps of the overall package (both positive and negative);
- How potential negative social impacts are currently mitigated in the proposals and where there are mitigation gaps;
- What are the interests and views of different decisionmakers such as Members of the European Parliament and Members States to the proposals in regards to the social impact of the proposals;
- The most impacted stakeholder groups’ perceptions of the equity of the proposals, their positions and organisations representing their interests and needs.
- Opportunities for influence decisionmakers and affected stakeholders groups to ensure a successful design and implementation of the Fit for 55 proposals

Ideally, the research should consider the Fit for 55 package as a whole, although we would prioritise quality work which is done within the chosen time limit **by February 28, 2022**. If the scope is – with good reason - deemed too broad by the selected research organisation, Laudes Foundation may consider refining the scope of the targeted regulations with a subset of proposals which are considered the most potentially impactful in the context of this study (e.g., by focusing solely on the Emission Trading Scheme for transports and buildings).

The geographical scope of the study will be EU-level³, with the option of focussing on a selection of individual or groupings of EU Member States that would: i) be the most likely to experience the social impacts of the package and/or, ii) be the most influential in the negotiations, both in terms of advancing the package of proposals or challenging it

The intention is to use this research to inform Laudes Foundation’s strategy development in the space of policy advocacy on just transition with a primary focus on the carbon and energy transition.

D. Research Scope

- i. Evidence Review of the social impacts of “Fit for 55” package of proposals. Desk review of existing academic and grey literature as well as existing official policy analyses and/or impact assessments addressing or lacking to address the potential effects of the “Fit for 55” package on different group of stakeholders (e.g. women, low-income households, workers at risk, migrants, communities of colour).*

³ In the context of the study, we will mainly consider social impacts within and between EU Member States. Additional considerations with regards to the proposed Carbon Border Adjustment Mechanism (CBAM) to third countries is welcome but not mandatory.

- ii. *Analytic paper (white paper) addressing responses to possible stakeholder concerns*
This should be a 10 – 15 page original ‘think piece,’ suitable for publication, discussing the following questions:
- Which stakeholder groups are affected by the equity considerations of the Fit for 55 package?
 - What are their interests and needs?
 - What are the [3-5] most contentious issues that are expected to lead to trade-offs? Who are the stakeholders in these trade-offs?
 - What are effective ways in which social movement actors engaging with policy makers and each other? What might enhance these efforts?
 - What could the EU member states do to mitigate potential negative impacts of the proposals?
 - Which are the EU member states and other actors (e.g., lobby groups, consumer organisations, trade unions) that have the biggest influence in advancing or derailing the proposals?

E. Methodology

a. About the methodology

The methodology for the evidence review should include a mix of official impact assessment reports, academic papers, and grey literature. In case there is not enough literature to get a comprehensive picture of impacts, interviews with appropriate actors and stakeholders may be added. All sources must be appropriately referenced in the literature review. Methods will be further informed through consultation with Laudes Foundation in the inception phase. This will need to be done during the inception phase of the research. The Research Team must be appropriately diverse and the research methodology should be gender sensitive and inclusive in its approach.

The accompanying analytic paper will provide commentary on what if any shifts are needed to enhance equity in Fit for 55 proposals. The analytic paper will discuss and provide author’s insights on the questions outlined above.

b. Data Collection

Important sources of information for this work may include Laudes Foundation staff and partners relevant to EU climate policy.

A draft report will be discussed in a meeting and circulated to relevant staff and management for review and comment prior to finalisation. The final report will be published on Laudes Foundation’s website.

F. Roles and Responsibilities

The Research Manager (Programme Manager, Laudes Foundation) is responsible for:

- Overall responsibility and accountability for management and

delivery of the research up to and including approval of the research report (in consultation with the Effective Philanthropy team at Laudes Foundation)

- Leadership of the research draft report review process including collating comments from Laudes Foundation and facilitating discussion and feedback
- Identification of peer reviewers (internal and external) and management of peer review process
- In all of these roles, necessary support will be provided by other members of the Laudes team
- Leadership in use of the research and its publication with support from the Brand and Communications team at Laudes Foundation

The research consultant(s) is responsible for:

- Conducting all necessary literature review and qualitative and quantitative assessments and data collection as necessary
- Day-to-day management of the research and methodological approach
- Regular formal and informal reporting to the programme manager
- Preparation of and participation in key research related meetings (kick off meeting, inception report meeting and draft findings meeting etc.)
- Support in identification of peer reviewers
- Addressing peer review feedback in the research
- Production of deliverables (inception report and research report) in accordance with the request for proposals, Laudes Foundation editorial style guide, Laudes Foundation report style guide and contractual arrangements

The peer reviewers are responsible for:

- Reviewing the draft research report
- Providing peer review feedback to ensure quality of the research report
- Liaising with the research consultant(s), as required

The Researcher (or research team) will report directly Silvia Ursu and Cédric Pacheco, Programme Managers, Laudes Foundation.

G. Research Process

The research will be carried out according to the principles set out in Laudes Foundation Research Procedures.

The inception and workplan should operationalise the Request for Proposals. The inception report will be based on initial documentary review and preliminary interviews. The inception report and workplan will address the following elements:

- Literature review;
- Appropriate coordination with similar ongoing reviews;
- Expectations from and objectives of the research;
- Roles and responsibilities within the research team;
- Joint refinement of the research scope and questions;
- Methods – qualitative and quantitative and data collection, including possible constraints, ethical considerations and risks;
- Addressing peer review feedback;
- Outline of the final research report.

The inception report and work plan will be approved by the Programme Manager in consultation with the Effective Philanthropy team at Laudes Foundation and act as an agreement between the consultants and Laudes Foundation on how the research is to be conducted.

The research consultants will prepare the draft and final research reports that describe the research methodology, discuss referenced literature review and key findings.

Research Process	Due Date	Responsibility
Selection and contracting of consultancy	October 25, 2021	Programme Manager at Laudes Foundation
Inception report prepared	November 8, 2021	Researcher / Research Team
A consultation workshop with internal stakeholders and two peer reviewers carried out by the Research team once the inception report is concluded to increase the relevance of the review to the needs of programme teams and key European partners	November 15, 2021	Researcher / Research Team

Completion of document review / literature review	January 14, 2022	Researcher / Research Team
Draft report for comment	January 21, 2022	Programme Manager at Laudes Foundation (facilitator)
Completion of analytic paper	February 4, 2022	Researcher / Research Team
Draft analytic paper for comment	February 11, 2022	Programme Manager at Laudes Foundation (facilitator)
External peer review	February 21, 2022	Research Team
Final report	February 28, 2022	Research Team

H. Deliverables

The research requires the Research Team to complete the following deliverables:

- Inception report
- Research Findings Meetings
- Evidence review draft and final report
- Analytic paper

The Research Team should attend meetings and calls with Laudes Foundation staff to align on requirements, needs and guidelines for activities.

I. Audience and Dissemination

This research is for Laudes Foundation staff and governors, but the report from the study will be published on the Laudes Foundation website and can also be published by the author(s) through their own communication channels once Laudes Foundation has released the report.

J. Proposal, Research Team Requirements and Level of Effort

- A narrative proposal (no more than five to six– pages excluding annexes) and including the following sections:
 - a) Research Methodology: Describe your overall approach and research methodology.
 - b) Relevant Experience: Provide details of projects of similar scope, methodology, complexity and nature you have worked on previously.

- c) Specific Expertise: Describe your level of knowledge and expertise conducting the specified type of research and in geographies (as needed).
 - d) Specific Expertise of the researcher (or research team). Include CVs (no more than three pages each and attached as annex).
 - e) Timeline: Confirmation that you agree to the research timeline as outlined in this RFP +/- 2 weeks.
 - f) Sample reports: Two sample research reports authored by the team lead (will be treated as confidential and used for purposes of selection)
- A financial proposal should include a line-item budget and a budget narrative. The cost estimates used to prepare the budget should be presented in Euros. The proposal should include costs of a professional editor to prepare the report for external publication. The proposal should include estimated costs for the peer review by two qualified peer reviewers in the inception phase and of the draft report (per peer reviewer a minimum EUR 500 per day x 6 days and the rate should assume a 20% VAT charge). The peer reviewers will be external and should have no conflict of interest.

Each proposal will be evaluated based on methodology and relevant organisational and staff experience and capabilities. The total budget for this landscape review should include travel expenses (if applicable) and VAT. Given the current situation with COVID-19, we do not anticipate this work requiring travel.

The members of the Research Team must have:

- A strong understanding and proven experience regarding gender, social, labour and climate policies. Knowledgeable in just transition, equity and inclusion issues and ability to undertake this research;
- Excellent research skills including data collection, interviews, literature review, focus group facilitation;
- Team composition with appropriate diversity and gender-balance;
- Fluent ability to communicate in English; further European language ability an advantage;
- Strong facilitation skills;
- Good research project management skills;
- No conflict of interest with Laudes Foundation.

Laudes Foundation may choose to ask a number of RfP finalists to collaborate on the research in case of complementary expertise and experience.

Level of effort:

- This research is estimated to not take longer than 60-90 working days.

Proposals should be submitted by October 11, 2021 and emailed to Silvia Ursu at s.ursu@laudesfoundation.org.