

# Terms of reference

## Introduction

Perspectives Climate Research gGmbH (“PCR”) is running the “International Initiative for Development of Article 6 Methodology Tools (II-AMT)” since January 2022. The initiative is an international expert-led process to enable the alignment of existing baseline and monitoring methodologies with rules and principles for collaboration under Article 6 of the Paris Agreement. The initiative has foreseen three different project phases towards its goal of implementing Article 6 tools: Conceptualisation phase, development phase and piloting phase.

The initiative is currently in its piloting phase which aims to apply and practically test the three Article 6 tools prepared during the initiative’s development phase:

- [II-AMT TOOL01: Tool for assessing the additionality of an activity](#)
- [II-AMT TOOL02: Tool for a robust reference case determination](#)
- [II-AMT TOOL03: Tool for monitoring, reporting and verification of emissions, emission reductions and removals](#)

The piloting of the tools is carried out with a new or existing activity that is currently in a conceptualisation phase, meaning that it has not been implemented yet or is undergoing a renewal process of its crediting period. The following steps will be carried out for the piloting:

1. Selection of a suitable carbon market activity
2. Application of II-AMT TOOL01, TOOL02 and TOOL03 to the selected activity design documents and its methodological approach
3. Systematic analysis of the insights from the piloting exercise and derivation of adjustment needs in the II-AMT tools including the presentation of the results in the context of an Advisory Group meeting
4. Revision of the tools based on the analysis
5. Preparation and publication of a briefing paper

The piloting with one selected activity is supported by the Federal Ministry for Economic Affairs and Climate Action of Germany (BMWK). Perspectives as convener of II-AMT is looking for 3 to 5 international carbon market experts with expertise on carbon market methodologies and methodological tool development. A profound knowledge of the methodological requirements of Article 6 of the Paris Agreement and steps proposed in the II-AMT tools is required. A good understanding of the ongoing operationalisation of the Article 6.4 mechanism are an advantage.

## Sub-tasks to be executed by the consultant(s) – scope

Perspectives will lead the piloting exercise of the three tools with support from the international carbon market experts. The consultant(s), in close cooperation with Perspectives, will be responsible for executing the following sub-tasks.

### Sub-task 1: Application of the II-AMT TOOL01, TOOL02 or TOOL03 to the selected activity and its methodological approach

Sub-task 1 comprises supporting the stepwise application of one of the II-AMT tools to the activity. This comprises:

- Supporting Perspectives in the coordination and cooperation with the respective activity developer to resolve questions on aligning the activity design and its methodological approach with the steps outlined in the respective II-AMT tool
- Supporting the review of underlying project documentation including methodological approaches and provision of advice and guidance on adjusting these to align with Article 6.4 requirements and the steps in the respective II-AMT tool
- Participating in regular meetings with other II-AMT experts on the piloting process to resolve issues and identify next steps and adjustments needs in the II-AMT Article 6 tools

### Sub-task 2: Systematic analysis of the insights from the piloting exercise of the respective II-AMT tool

The findings from the practical application of the tools are to be systematically compiled and analysed to identify any need for revision. This includes:

- Providing written reflections on the application of the respective II-AMT tool regarding its:
  - Usability for the underlying carbon market activity
  - Limitations
  - Necessity of sector or activity-specific adjustments
- Contributing to an initial summary and discussion of potential adjustment needs in the context of meetings with the complete II-AMT expert team
- Presenting and discussing the results of the analysis during a meeting with the II-AMT Advisory Group in order to identify the next steps

### Sub-task 3: Revision of the respective II-AMT tool

Based on the findings from the piloting exercise and the outcomes of the Advisory Group meeting, the II-AMT TOOL01, TOOL02 and TOOL03 will be revised. Thereby, further international developments (e.g., Article 6.4 Supervisory Body progress on the methodological guidances and relevant CMA decisions) should also be incorporated into the revision of the tools. The consultant(s) is responsible for the following tasks:

- Supporting the incorporation of discussed adjustment needs in the respective tool
- Participating in meetings with other II-AMT experts to discuss the proposed changes

### Sub-task 4: Contribution to the preparation of a briefing paper

Contributing to a short, written summary on the experiences with the piloting of the respective tool including lessons learned and challenges.

## Deliverables and planning

The project will be executed within 34 weeks after the project start on 01.06.2024. The envisaged period for the subcontract will be 15.07.2024 to 31.12.2024.

Timelines for the deliverables of the different sub-tasks will depend on many external factors and will therefore jointly be agreed upon between the consultant(s) and Perspectives during the subcontract period.

## Proposals

Proposals should specify the following aspects in detail:

- Suggested approach offered by the consultant,
- Relevant expertise on carbon market methodologies and Article 6 methodological requirements,

- Resource planning (number of person days) and required budget per subtask and consultants' function level (daily rate),
- Company profile and/or CVs, outlining the relevant expertise related to the scope of work.

The following items are to be included in the offer:

- the total amount of the offer (excluding VAT),
- the applicable value added tax,
- the total sum including VAT (if applicable).

The offer should be valid until 30.08.2024.

All budget calculations must be in EURO. The total budget for all 3 to 5 experts is up to EUR 30,000 (excl. VAT). The indicative budget per expert/company therefore lies around EUR 6,000 up to EUR 10,000. Financial offers of the individual experts/companies should adhere to the upper limit. We reserve the right to negotiate the proposed budget based on the number of suitable experts.

### **Selection criteria**

Perspectives will select the most adequate proposal based on the following criteria and their respective weightings:

- Technical content, adequacy of approach and methodology - 35%
- Consultant's expertise and references - 35%
- Budget - 30%

Please, send your proposal by email only (one pdf-file) to **Ms. Ximena Samaniego (samaniego(at)perspectives.cc)** before **12.07.2024, 23:59 CET**.

Ms Samaniego is available in advance to answer any questions on the formal design of the offer.