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Original research article

# Conceptualising social value in net zero governance: The case of Bristol City Leap

Caroline Bird <sup>a,\*</sup>, Emilia Melville <sup>a</sup>, Jack Nicholls <sup>b</sup>, Colin Nolden <sup>c</sup>

<sup>a</sup> University of Bristol, School of Computer Science, Queen's Building, University Walk, Bristol, BS8 1TR, UK

<sup>b</sup> University of Bristol, School of Sociology, Politics and International Studies, Priory Road, Bristol, BS8 1TU, UK

<sup>c</sup> University of Sheffield, Management School, Conduit Road, Sheffield, S10 1FL, UK



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## ABSTRACT

Social value is an important tool in public sector procurement, allowing the inclusion and valuing of elements beyond those directly procured, such as local jobs and environmental enhancements. In the UK, the Public Sector (Social Value) Act 2012 and the Public Procurement Act 2023 have enabled procurement reflecting wider co-benefits. This paper examines how social value has been codified in the public procurement of city-scale net zero energy infrastructure and services using the case study of Bristol City Leap, an innovative 20-year £1bn public-private partnership. We analyse the evolution of social value from its roots in value theory, to practical implementation in the governance of energy transitions, exploring how business efficiency logics relate to more participatory approaches to achieving co-benefits. Social value within the procurement of net zero energy investments can enable better alignment of private finance with public sector objectives. Our findings however suggest that social value frameworks relying on quantification and financial proxies risk missing the more qualitative measure of value that can bring deeper and more nuanced outcomes. Long-term contracts for comprehensive municipal clean energy governance, such as BCL, provide greater scope for more meaningful social value through the development of local supply chains, longer term jobs, co-productive relationships with local voluntary and social enterprises and participatory processes. We conclude that a hybrid approach could maximise social value outcomes. While it is too soon to fully evaluate, nevertheless this is a significant case study for understanding social value in urban energy transitions.

## 1. Introduction

The concept of 'Social Value' in public procurement requires that *additional* benefits beyond those being immediately procured should be included and assessed in the procurement process, seeking to maximise benefits beyond those to be delivered through procurement of goods and services themselves [1]. These benefits might include local jobs, staff volunteering, community benefit or environmental enhancements. This inclusion and measurement of social value is one way of directing the significant resources of public procurement spend toward wider social, environmental and economic co-benefits. Even in the context of ostensibly pro-environmental spend directed toward clean energy and the net zero agenda, social value procurement legislation provides necessary support for going beyond a narrow focus on economically most advantageous tenders. This integration of social value is estimated to add a

minimum of 5% and up to 20% of community benefit at no additional cost [2].

This paper investigates the concept and outcomes of social value in the context of public procurement for city-scale net zero energy infrastructure and service provision in the UK. Taking a case study of the 20-year Bristol City Leap (BCL) public private partnership to support Bristol on its journey toward climate neutrality [3], the article examines social value foundational logics and deconstructs how these have been translated into a policy framework and then operationalised in practice. We draw on a range of data sources including policy and decision documents, interviews, meetings and workshops to develop a deeper understanding of social value in net zero energy procurement and governance. BCL aims to deliver around £1bn of investment in energy infrastructure and service delivery over its 20-year contract, supporting decarbonisation of the public sector estate and social housing, and the

\* Corresponding author at: School of Geographical Sciences, University of Bristol, Bristol, BS8 1SS, UK.

E-mail addresses: [caroline.bird@bristol.ac.uk](mailto:caroline.bird@bristol.ac.uk) (C. Bird), [emilia.melville@bristol.ac.uk](mailto:emilia.melville@bristol.ac.uk) (E. Melville), [jack.nicholls@bristol.ac.uk](mailto:jack.nicholls@bristol.ac.uk) (J. Nicholls), [c.nolden@sheffield.ac.uk](mailto:c.nolden@sheffield.ac.uk) (C. Nolden).

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extension of district heating networks and renewable energy generation. This includes 14.5% of the initially contracted investment of £424 m allocated to social value [3] over the first 5 years (see Appendices A and B). This social value component has the potential to address both a narrow focus on profitability and the spatial inequalities associated with individual decarbonisation projects and energy system transformation [4] [5] [6] [7] which we will explore further in this text.

Social value is seen as a route to deliver the UN Sustainable Development Goals (SDGs) at a local level [1]. The UK government sees “a clear connection between the Sustainable Development Goals and government’s ambition around social value” [8], further stating that government ‘has a responsibility to maximise benefits’ and that failure to deliver social value ‘may lead to costs that the taxpayer has to absorb elsewhere’. In the UK, social value was first enshrined in law through the Public Services (Social Value) Act 2012 which states that “the authority must consider how what is proposed to be procured might improve the economic, social and environmental well-being of the relevant area” [9]. The Procurement Act 2023, which supersedes the 2012 Act, does not explicitly mention social value but rather states that “a contracting authority must have regard to the national procurement policy statement” [10] which in turn states that “contracting authorities should consider the [...] social value outcomes alongside any additional local priorities” [11].

The dominant understanding of social value in local government has been framed primarily by procurement (value) managers in operationalising social value with regard to these acts [12] [13]. This has resulted in the emergence of *quantified* social value frameworks which tend to focus on local economy value, through measures such as employing people living in particular postcodes, or who are long term unemployed, or who fit certain equalities criteria. These are all measures which are easily quantifiable and to which can be assigned values of financial equivalence. This quantitative approach is in contrast to previous approaches for including social aspects in tenders which involved conditions in contracts to be addressed as part of the overall delivery; now social value is used at the tendering stage, with numerical equivalences compared in addition to price [12] [14] [15]. Effectively social value has become quantified at the expense of qualitative measures which might yield richer outcomes – a tension we return to elsewhere in this paper. The limitations of an approach which focuses primarily on commensurable, quantified variables at the expense of qualitative variables that can recognise intrinsic value is well-established in the social value literature [16] [17] [18]. Raiden and King [19] argue that “it is individuals and communities who ought to be involved in defining their own priorities”, whereas “there is a drive, by some, to make social value a neatly defined top-down agenda”.

We propose that the integration of social value into public procurement reveals a structural tension between calculative and participatory logics of valuation - a tension that has significant implications for how value is defined, measured, and operationalised in the governance of energy transitions. On the one hand, quantification frameworks like the National TOMs<sup>1</sup> reduce diverse social outcomes to financial proxies, enabling comparability, legal defensibility, and transactional efficiency. On the other, such tools risk marginalising more relational, contextual, and ethically embedded forms of value - forms that are central to building trust, procedural legitimacy, and long-term social impact in complex transitions like decarbonisation. We suggest that this is of particular concern when considering substantial and long-term city-scale investment in energy infrastructure and services.

In this paper we contribute a detailed, contextually-based case study of city scale decarbonisation through energy infrastructure and service delivery investment to the growing literature on the practices of social value. We argue that there is a tension between the need to minimise transaction costs through standardised quantified measures of social

value as financial proxies versus a participatory approach [21] that involves democratic processes of uncovering residents’ preferences, which takes time to do meaningfully and involves negotiation of power [22]. These alternative practices of valuation are important because they can be seen as constituting value itself, rather than value being an intrinsic property of an object or a subjective experience of its utility [21] [23] [24] (following [25] in 1939). Widening approaches to social value would, we argue, enrich decision-making and further benefit communities.

Using the procurement and early stages of delivery of the BCL public private partnership as a case study, this paper analyses how social value is codified and its delivery operationalised in the delivery of net zero.

We ask:

1. (How) do numerical and participatory approaches to social value provide complementary outcomes?
2. Within the necessity of attracting private finance to achieve energy infrastructure transformation, what insights into social value operationalisation do we gain from the BCL approach to the governance of energy transitions?

The paper’s argument is developed across the following sections. Section 2 outlines current approaches to capturing social value and situates the debate in value theory, it then introduces the BCL case study. Section 3 describes a multi-method case study. Section 4 presents findings and discussion and section 5 concludes.

## 2. Framing (social) value

### 2.1. Social value in public procurement

In the context of procurement in England, social value was incorporated into legislation in the Public Services (Social Value) Act 2012 [9] enabling a focus on *local* economic development and equitable distribution of opportunities and benefits [26], reflecting the wider role of state bodies as functioning for the benefit of their populations in creating public value. The early undefined nature of social value enabled diverse approaches to commissioning and tendering, including delivery of co-benefits, and collaborative definitions of both value and evaluation criteria with third sector providers [14] [27]. The Procurement Act 2023, which supersedes the 2012 Act, states that “a contracting authority must have regard to the national procurement policy statement” [10]. Rather than a requirement, this amounts to “a flexible toolset that allows contracting authorities to action different levels of ambition” [28]. At the very least, contracting authorities need to state why they might or might not pursue social value outcomes.

The recognition of social value in law has prompted the emergence of competing frameworks to guide the incorporation of social value requirements in procurement processes, such as the Social Value Model [29], Social Value UK [30], the UK Social Value Bank [31], the Social Value Engine [32] and the Social Value Portal [20]. At national level there has been a consolidation around the Social Value Model [29] introduced by the Cabinet Office in 2020, which is now a mandatory tool that must be used by all central government departments, their executive agencies, and non-departmental bodies. Outside central government, the Social Value Portal’s National TOMs (Themes, Outcomes and Measures) Framework, supported by the Local Government Association, is currently (in 2025) the most popular tool with estimates suggesting that around a third of local authorities in England and Wales use it [33]. In a local authority context, social value is thus increasingly defined by the TOMs framework, although its approach to measuring social value is mandated neither in the Public Service (Social Value) Act 2012 nor the Procurement Act 2023. Co-benefits of local action on net zero and

<sup>1</sup> Themes Outcomes and Measures in the Social Value Portal framework [20]

climate change go beyond the legislated approach of social value, as discussed by Sudmant et al [34]. Tools such as the EU-funded ‘COMBI’<sup>2</sup> and Carbon and Co-Benefits Decision Support Tool developed by the Centre for Climate Change and Social Transformations (CAST)<sup>3</sup> provide alternative means of assessment that focus on the co-benefits of energy investment and might deliver broader outcomes, but their deeper analysis is beyond the scope of this paper.

The National TOMs lists over 100 social value measures, many of which include financial proxies. Local governments and public bodies typically select from these and translate them into their own social value procurement frameworks. We identify three particular issues in relation to codification of social value through such frameworks.

Firstly, the measurement of social value under frameworks such as the National TOMs is primarily an accounting system that is underpinned by a social value logic closely associated with ‘Social Return on Investment’ (SROI), which has evolved out of cost-benefit analysis methodologies [35]. Following these logics, the ‘value’ side of the balance sheet is the measurement of social value.

Secondly, frameworks such as National TOMs quantify social value in financial terms and obtain a *single* monetary figure which can be used by the procurement team in their evaluation of possible contractors. There is a danger that presenting a single financial figure of social value gives a false impression of social value as a neutral or objective measure. In practice, however, the process of assigning a quantitative value to something is a social process which is affected by beliefs, political structures, and interests – with each local interpretation of the national framework reflecting the issues and needs of a place [36].

Thirdly, questions in these social value procurement frameworks are primarily addressed to large companies. For example, there are points given for subcontracting to local small and medium-size enterprises (SMEs) and Voluntary, Community and Social Enterprises (VCSE), but not for simply being one. The evolution (and monetisation) of social value in procurement has favoured large companies, at the expense of SME and VCSE sector organisations. Such organisations have neither the capacity to invest in paid volunteering hours, job creation for the sake of winning a contract, or taking on apprentices, nor “access to economies of scale in compliance, data access, and speed of response to queries” ([37]: 6, [38]). These frameworks also, by linking social value associated with labour so strongly to paid employment, replicate the common assumption that paid work should be valued over “forms of economic activity that are informal, community based, and driven by collaboration and sharing” [39].

## 2.2. Understanding value and the implication of participation

The integration of social value into public procurement reflects a recognition that conventional market-based approaches can neglect key societal and environmental outcomes. However, the instruments developed to operationalise social value frequently remain embedded in a logic of calculative rationality [36]. Tools such as the UK National TOMs framework reduce social commitments - ranging from apprenticeships to carbon savings - to financial proxies. These tools appeal to procurement professionals because they facilitate comparison across bids, reduce perceived subjectivity, mitigate legal risks, and lower transaction costs. Yet these advantages come with significant trade-offs: the process of quantification privileges outcomes that are measurable, often sidelining values that are more relational, qualitative, or context-dependent [1].

This dynamic reflects deeper tensions in value theory. Some values are considered to be ‘intrinsic’ and valuable in their own right, others

are ‘extrinsic’ or ‘instrumental’ and valuable because they enable achieving intrinsic value [40]. In a market, economic value is expressed as ‘exchange value’ (how much would you be able to sell something for) and therefore a form of extrinsic value. However, over-emphasis on exchange value can mask intrinsic values – such as cultural, symbolic, emotional and relational (eg [18] [41]). Carney [42] argues that there is a contemporary shift from an economy in which value was shaped by social and moral norms to one in which market price has become the dominant - often sole - indicator of worth. However, in areas such as public procurement and energy infrastructure, other outcomes are valued by society - such as equity, inclusion, or long-term resilience – and these are not easily expressed through price. Procurement professionals relying on calculative tools miss out on exercising wider knowledge from their experience and professional judgment. They also tend to under-estimate public benefits [43] and thus narrow the role of the state to that of an administrator of markets, when it should create value by investing in ‘missions’ [44] for socially desirable outcomes, such as low carbon energy transitions.

The market price is one (imperfect) tool for assessing subjective value. A more intuitive approach is to ask people directly what they value and allow direct interpersonal negotiation of what is important. Rather than treating value as a technical input to be calculated, an alternative participatory approach views it as emerging from processes of social deliberation and negotiation. This aligns with more sociological theories of valuation, which see value not as an inherent property of goods but as something co-produced through institutional practices and collective reasoning through participatory processes and engagement [45] [46] [47]. Within the energy transition literature, there is a growing recognition of the multifaceted value of participation. Scholars have highlighted, for example, how participation can open up plural valuation processes [48], embody relational and affective dimensions [49], carry intrinsic normative significance [50], and unfold in dynamic, emergent ways [51]. Participation in the context of net zero has both the instrumental value of increasing public support, and the intrinsic value of participation itself, which Max Neef lists as one of nine fundamental human needs [52].

Yet participatory processes also carry costs - financial, temporal, and institutional. In the resource-constrained context of public procurement, these transaction costs are not just theoretical frictions but real constraints. A participatory process requires facilitation, coordination, and governance structures capable of turning community input into binding contractual commitments. It also raises questions: who is included in these conversations? Whose values are represented? And who is accountable for ensuring they shape outcomes in an equitable way? This creates a structural dilemma. On one hand, calculative tools such as TOMs support consistency and legal defensibility, helping procurement professionals navigate complex decisions in high-stakes, time-limited contexts [53]. On the other, they risk marginalising values that are difficult to quantify but socially vital in the governance of energy transitions – such as ensuring a just and inclusive route to decarbonisation. Participatory approaches promise richer, more context-sensitive understandings of value, but may appear inefficient or risky in bureaucratic settings.

## 2.3. About Bristol City Leap

We take the case study of BCL to explore how social value can be operationalised in net zero delivery. BCL is a significant and innovative example of a competitively procured public-private-partnership (PPP) for city-scale decarbonisation. Its lengthy procurement process started in 2018 when the ‘City Leap Prospectus’ was published [54] [55] – inviting expressions of interest and proposals for collaboration. The

<sup>2</sup> Calculating and Operationalising the Multiple Benefits of Energy Efficiency in Europe (COMBI), <https://wupperinst.org/en/p/wi/p/s/pd/524>

<sup>3</sup> <https://cast.ac.uk/cast-tools/carbon-and-co-benefits-decision-support-too>

process concluded in 2022 with the concession agreement which established the Bristol City Leap Joint Venture Company as a 50–50 PPP which commits a private sector partner (Ameresco<sup>4</sup> with Vattenfall as essential subcontractor for heat networks) to invest £424 m by 2030 and around £1bn over the 20-year duration of the contract [3] [57] (see Appendix A for details). While procuring a PPP through a competitive tendering process entails high transaction costs - the total cost of procurement and mobilisation is estimated at £9 m [58] - ultimately, the partnership itself is intended to *lower* competition and transaction costs in the delivery of net zero in Bristol [59] [60], while ensuring *the delivery of social value and other benefits*. In the report to cabinet in December 2022 establishing the partnership (agenda item 8, [57]) it was stated that it further benefits the local authority by:

- a) Freeing-up capital for investment in other key Council initiatives
- b) Removing the need for the Council to deploy and manage large-scale commercial development of low carbon infrastructure, and the risks that go with that,
- c) Enabling the Council to focus on other social and economic areas of need in the community and just transition,
- d) De-risking the large-scale investment that is required to deliver the City Leap outcomes.

This suggests that by engaging in the City Leap process the city authority would be able to lower transaction costs overall by re-allocating limited resources to other priorities (points a and c) whilst scaling up and de-risking infrastructure delivery (points b and d) by outsourcing to a commercial partner. Further details on how BCL lowers transaction costs is provided in the analysis.

### 2.3.1. Contracted social value

The initial Summary business plan published by BCL in December 2022 [3] states a contractual commitment of *£61.5 m of social value* (14.4% of investment) ‘over the first five years which will be verified through the Social Value Portal’s National Themes, Outcomes and Measures (TOMs) framework’. Whilst there are no publicly available documents that clearly set out all the social value commitments, KPIs and intentions contained within the term ‘social value’ in the contract between BCL, BCC and Ameresco, Appendix B provides a breakdown based on information in the public domain. Of the social value commitment, £50 m, or 82% of the total, is for local contracts, of which £7 m is for local MSMEs (Micro, Small and Medium Enterprises). Other social value to be verified through the Social Value Portal includes new employment, community engagement and skills development, although there are no financial values given against these. The 2022 Business plan also outlines ‘Additional social value commitments’ of which £5.1 m is quantified as shown in the breakdown in Appendix B. Other additional commitments include a number of strategic partnership and community participation commitments. The 2024–5 Business plan [61] reports on achievements against the 2022 plan as shown in the final column of Appendix B..

### 2.3.2. Participation as social value

In Bristol City Leap, the embedding of participation takes place through the social value commitments. These include community funds and promises of wider engagement through community fora and crowdfunding investment opportunities. A consortium of civil society organisations involved with community energy and social investment initially proposed the concept of community funds to BCC, highlighting the opportunity uniquely presented by City Leap to generate substantial community benefit through such funds - engaging new communities in

<sup>4</sup> Ameresco is a New York stock exchange listed multi-national ‘leading cleantech integrator and renewable energy asset developer, owner and operator’ [56] operating in North America and Europe

decarbonisation projects and raising awareness. Participation is thus a recognised form of social value which has engaged civil society in the city’s approach to decarbonisation. Whilst most of these efforts came initially from groups and individuals whose business is to participate in the net zero transition, the stated intention by BCL to engage with local communities remains. We discuss this further in section 4.

## 3. Methodology

Our approach to exploring social value in civic net zero delivery necessarily includes several elements in order to look both at the historical evolution of social value in procurement and then to examine the context of Bristol City Leap (BCL) as a case study.

### 3.1. Data collection

Firstly, a **targeted literature review** addressed the meaning of ‘value’ and looked at the first stages of social value and its intent, allowing us to start to critique how it has developed as a process, and its changes over time.

In parallel, **documentary analysis** of the national TOMs framework guidance [62] and its local interpretation in the context first of BCC Social Value Policy [63], and then specifically of BCL, gives us a view of the current expectations for social value inclusion in procurement. The research team undertook extensive work to understand how social value was interpreted in different iterations of the frameworks and policies, linking this to the logics of value understood in the literature. Additionally, in order to understand BCL both as a concept and for its social value claims, Bristol City Council (BCC) documents and meeting records (see [54] [57] [64] [65] and others listed in Appendix C) and the published BCL 5 year business plans [3] [61] were examined in order to understand how the social value elements were considered and included, and the logics of value that were embedded. We made several attempts to obtain more information about the detail of the contractual social value commitments; however, this was unsuccessful despite active correspondence with key decision-makers within both BCC and BCL. We therefore had to rely on information in the public domain.

Secondly, as researchers, all the team have participated in workshops and meetings which have informed the decarbonisation of the city and the City Leap approach and, through immersion in different aspects of BCL’s development, have both played a part and observed this change over the last ten years. We consider this a **researcher-practitioner approach** where both researcher and practitioner roles are performed in parallel and inform each other. Examples include helping set up community energy companies, involvement at director level in community interest companies (CICs) and undertaking energy research in the city, all leading to a deeper understanding of how and why Bristol City Council procured BCL and how it is operationalised. We recognise that this long-term engagement in the city might lead to bias but, being conscious of this and working as a team of four researchers with different experiences, we critically and reflexively challenged each other’s assumptions to ensure that this is addressed. The value added through this immersion is a deeper understanding of the drivers and historical processes surrounding the evolution of local energy initiatives and governance.

Empirical research data takes the form first of **meetings and workshops**, organised both as information sessions by BCL / BCC and by ourselves doing this research during 2021–25, in which time the BCL procurement process was being undertaken and the first stages of the implementation happening. These included one-to-one and team meetings with BCC and BCL contacts before and after the contract was signed, as well as public facing information sessions where we could observe how questions from the wider city were posed and responded to.

Specifically, we organised a workshop with representatives of community organisations across the city to consider how social value as outlined in the BCL business plan might contribute to delivery of a just

transition in the city, mapping social value aspirations to a local interpretation of just transition in the Just Transition Declaration (JTD) adopted by BCC and other Bristol organisations [66]. These voices are important to hear as we explore what social value means for communities and how participatory governance might occur in reality.

Finally, alongside these in person and online meetings and workshop sessions, **ten in-depth interviews** (shown as P1–10 in the text and listed in Table 1) were conducted with senior managers and leaders from BCC, the BCL contractor Ameresco, BCL itself, and energy service contracting experts (including a competing BCL bidder). The first 6 explored the specifics of BCL in evolution and operation, and the additional 4 further explored this type of energy contracting with suitable experts, adding to the richness of the data.

Interviews covered decarbonisation approaches in the city and how BCL was conceived, developed and tendered; the pros and cons of this PPP governance model vis-a-vis other approaches to decarbonising cities; perceptions and understandings of social value both theoretically and in the context of BCC and BCL; and expectations of BCL and its outcomes. These were analysed using a thematic approach to provide a richer understanding of the processes and issues during development and realisation of the BCL concept over the course of over 4 years. The ten interviewees were carefully selected to provide this rich contextual, historical and implementational perspective with more than one interviewee coming from a cohort of employees previously employed by BCC and then moving into roles with BCL. We have not, therefore identified the interviewees as relating to a particular organisation, both for confidentiality purposes and because their specialisation is of more relevance than organisational affiliation.

### 3.2. Analysis approach

The process and timeline of data collection meant that we took an iterative approach to analysis through the project. The early documentary analysis, particularly of social value policy and implementation frameworks alongside BCL tender documentation helped formulate the themes and questions for the subsequent meetings and interviews. As a team, and drawing on our understanding of civic decarbonisation processes developed over time in the city, we undertook several rounds of brainstorming documentary findings and then empirical themes, tying these together with initial literatures.

Analysing core documents, deconstructing logics of value inherent in TOMs frameworks and drawing out intention and potential in concepts of social value were key to structuring both interviews and subsequent analysis. The interviews and other texts were analysed thematically, based on themes developed as above. Core themes relating to energy contracting were: governance (in-house capabilities, public-private partnership, oversight), social value (development, reportable, additional), implementation (local benefit, engagement, equality), and longevity.

These different approaches have been brought together to provide a critique of social value, its implementation and opportunity, and a detailed exploration through the case study of BCL of how it is enacted in

the management of decarbonisation – drawing out lessons for other cities and future policy.

### 3.3. Limitations

We recognise that BCL is, currently, a unique approach to large scale public-private city decarbonisation, albeit one which both its Bristol initiators and the UK Government hope can be replicated; indeed, Marvin Rees, then Bristol Mayor, stated that ‘*The pioneering model developed in Bristol was purposefully designed to allow for it to be replicated elsewhere*’ [67]. Government funding was allocated in 2023 to support the replication of Bristol’s approach in York and North Yorkshire [68]. Our discussion and conclusions necessarily draw on this uniqueness as we try to extrapolate policy implications and recommendations for extending this approach more widely.

The interviewees represent a range of professional disciplines relating to the procurement and operationalising of BCL. A broader range of interviewees, including from VCSEs, might have added to the richness of the data although the community workshop and ongoing immersion in energy communities in the city help to address this shortfall.

Finally, as this is still very early in the implementation of City Leap, it is not yet possible to assess whether the approach being taken will be successful in delivering its stated aims – both in terms of decarbonisation and for the wider societal benefit of the city.

## 4. Findings and discussion

In this section, we focus first on social value delivery in practice. We then discuss three key themes emerging from our analysis relating to social value implementation and its outcomes in the context of decarbonisation and energy governance. We take the lens of our research questions and look at these themes both through the theorising of social value and in the balance of calculative and participatory value in their implementation through our case study.

### 4.1. Social value delivery in practice

In the context of local government, as one of our interviewees said, ‘*the council is fundamentally involved in delivering social value to the community*’ [P5]; this is a core role for local government. The use of the TOMs methodology in public procurement is then just one aspect of the wider provision of social value across all of a council’s activities, with many other socially valuable outcomes expected from public service delivery. Even within a procurement exercise, additional social value can be offered beyond the TOMS framework which is demonstrated in the BCL contract with the inclusion of ‘additional social value’ items [3] listed in Appendix B.

In Tables 2 and 3 we unpack social benefits from both *additional* social value items and from BCL’s core activities, identifying benefits yielded and who benefits. Some of these wider social benefits derive from the long-term duration of the concession agreement, whether this is building up a supply chain for decarbonisation that can be drawn on for other projects outside of the core BCL contract, addressing justice and equity in the energy transition or building momentum and public participation in the net zero journey. Participants in our community workshop in particular helped identify where these activities delivered social value that also addressed the aims of Just Transition and aligned with needs of their communities.

### 4.2. Financial proxies and comparability, or participatory value

This section goes to the heart of RQ1 in addressing the complementarity of numerical and participatory approaches to social value. In procurement, the use of financial (numerical) proxies is seen as bringing ‘rigour’ and making social value measurement less ‘frustrating’ and

**Table 1**  
Interviewee details.

Ref.	Role
P1	Senior energy manager
P2	Senior politician
P3	Communications manager
P4	Energy operations manager
P5	Procurement manager
P6	Social value manager
P7	Former energy service contractor
P8	Competing BCL bidder
P9	Measurement and verification expert
P10	Energy service contracting adviser

**Table 2**  
Social benefit outcomes from BCL's 'additional' social value activities.

BCL 'additional' social value activity	Social benefit	For whom
Establishing community forums and a heat network advisory panel to consult and inform BCL board and management team to support the "just transition" to a low carbon economy	Helps get a range of opinions and voices heard by decision makers and fosters engagement	Citizens
Commitment to at least 'Real Living Wage' being paid to everyone both directly employed by BCL and through the supply chain.	Setting the bar for wages across the supply chain, ensuring basic decent pay for all	Workers
Engaging with Business West to support members being part of local supply chain, and in carbon reduction	Working with local businesses to promote engagement and contract delivery	Local business
Working with Business West, BCC's skills and employment team and others to develop local skills.	Developing better skilled workers ready for future work opportunities	Workers
Supporting the community climate action programme – particularly in lower income areas	Helping communities engage in relevant action on climate change and boosting engagement	Communities

**Table 3**  
Social benefit outcomes from BCL core activities.

BCL core activity	Social benefit	For whom
Investment in social housing, prioritising low EPC homes to address fuel poverty	Addresses some of the health impacts of under-heated homes or those lacking the resources to maintain consistent energy supplies, thus improving wellbeing.	Low-income households
Home Upgrade Grant Scheme (HUGS) and other investment in private homes, particularly for 'Low income' households	Addressing fuel poverty and its attendant impacts (as above).	Low-income households
Carbon neutrality of BCC's estate	Public sector leadership helping build supply chain, setting exemplars for others to follow, demonstrating viability in decarbonisation, taking the initial risk so that others do not have to	Local business in progressing decarbonisation
Installation of renewable energy at scale – solar farms, wind turbines – including offering local community investment stakes in installations	Visible low carbon energy, social engagement	Citizens
Developing and extending the heat network and connecting new customers	Low carbon and reliable heating,	Homes and businesses

'woolly' (P5). This quantitative approach brings a number of advantages: the ability to hold suppliers to account, the ability to compare different social value offerings, and transparency for bidders to know how they will be assessed; it thereby reduces both the transaction costs and legal liability, especially with regards to potential challenges from competing bidders [59] [60].

*"The ability to ... compare what were on the face of it completely different things – is obviously an attraction. So if someone offers you three apprenticeships and someone else offers £30,000 of engagement with a local community group, how do you measure those things and how do you compare*

*those things?" (P5).*

However, there are downsides of relying on financial proxies as a measure of value, as Quattrone suggests: *"...a search for transparency presupposes what one wants to make transparent, and therefore this search can be deceptive, creates illusions of certainty, allows purposeful manipulation of accounting data, and, above all, makes accounting users blind and the practice of valuation go unquestioned"* [69]. The numbers can give decision-makers a false sense of security, of 'rigour', when actually they measure and therefore value only the reasonably measurable. For example, in volunteering provided to VCSE organisations, value is only measured as the cost-saving of paying someone: eg. if free legal advice is provided, the social value assigned to this expert volunteering is *"based on the cost the VCSE is avoiding spending on a lawyer, not on the positive outcome for the community that is going to result"* [P5]. Quantitative valuation processes result in only quantifiable value being created [23].

So far, we see how social value is indeed a numerical device which makes measurement convenient. However, the focus on the ease of numerical comparability and financial proxies prioritises extrinsic values at the expense of intrinsic ones, such that any localised democratic process of defining what is in the public interest within a particular locality is avoided. In the context of city-wide energy services contracts such as BCL, opening up a meaningful participatory process beyond these extrinsic values is important for trust in the long-term process. Participatory processes could both deliver better core outcomes and better engagement in decarbonisation beyond the contract but need careful management and appropriate targeting. The inclusion of a community energy fund in BCL is one such outcome, developed in response to lobbying by the community energy sector and acknowledgement by BCC of the value of the sector for its social outcomes – developed over many years of engagement. Bristol Energy Network<sup>5</sup> (BEN) led the group of community organisations and produced a report on the pipeline of potential community energy projects [70] which was drawn on to design the community energy fund. BEN's key role was recognised and is now funded to support both existing and new community organisations in developing energy projects, enabling better bids and building capacity. This helps create a more level participatory playing field beyond established community energy organisations, delivering not just locally-valued energy projects but increased public engagement in energy generation and use.

Other commitments, to create a community forum for example, could be managed to ensure a wide scope of influence. Participants in the workshop held with community representatives supported an approach that created space for the views of different communities to inform BCL as early as possible and also to have a role in the allocation of community funds. However, whilst the local Centre for Sustainable Energy<sup>6</sup> administers the community energy fund and makes recommendations on funding, the final decision currently rests with the commercial funders.

The use of financial proxies is thus useful for straightforward competitive procurement exercises but if a longer-term relational approach to achieving value is used, quality is achieved more through other accountability mechanisms, trust and partnership, as discussed further in section 4.4.

#### 4.3. Local work and local economy

Local economic development factors such as local jobs and supply chain are a significant part of how social value is operationalised in local government procurement. In the context of BCL, our document analysis

<sup>5</sup> <https://www.bristolenergynetwork.org.uk/> - a membership organisation supporting community energy in the city of Bristol

<sup>6</sup> <https://www.cse.org.uk/> - Centre for Sustainable Energy, a Bristol-based charity – 'dedicated to a green, smart and fair energy system, that leaves no one behind'

identified that 82% of the total social value commitment (equalling £50 m over 5 years) in the initial business plan was stated as relating to the local supply chain. This includes ‘at least 410 Bristolians employed on BCL contracts’ with everyone receiving at least real living wage [3]. Training to ensure the right skills are available- for example in decarbonising the energy system and improving energy efficiency, is also important in the context of local social benefit and BCL sees this as a key part of accelerating progress to net zero:

*... we're working closely with the local colleges and universities around what kind of skills and people do we need to come through and feed the whole supply chain .... And that's important, because this is a blueprint for other cities ... if it's not replicable you're just moving workforce around to tackle cities, and [then] we'll never do it, so you need to do that everywhere' (R1).*

Our analysis of the BCC Social Value Measures frameworks [71] (based on the TOMs) revealed an emphasis on jobs in particular communities, for example a higher weighting is placed on new employment in under-represented minority ethnic groups, people with disabilities, long term unemployed or, in the 2021 framework, who live in postcode areas with higher levels of deprivation or lower educational attainment. However, while these criteria are important, they remain rooted in pre-defined metrics and top-down assumptions about what counts as valuable – and rely on numerical equivalences. Criteria such as supporting long-term unemployed with ‘work-ready’ training and mentoring disadvantaged young people have been suggested as additionally important by community representatives to address structural inequalities.

Creation of jobs has both intrinsic and extrinsic value. Paid employment has extrinsic value as it provides income which can be used for other intrinsically valuable parts of life – ‘work to live’. It also contributes to government revenue through income tax, to GDP, and to avoidance of government costs such as unemployment benefits. However, work has also been seen as having intrinsic value – feelings of worth, respect, meaning or satisfaction for example [72], points made by community representatives in this research. Additional local employment and supply chain spend also has indirect economic benefits when employees spend their wages within the local economy – the ‘multiplier effect’. Prioritising local employment, where workers can go home every evening, has wider social and health benefits, enabling workers to participate in family life, in their community and in local cultural activities. This intrinsic value - rooted in social connection, wellbeing, and a sense of place - is harder to quantify and more contingent on individual circumstances and preferences. Yet these are precisely the kinds of values that could be surfaced, explored, and deliberated upon through meaningful engagement between employers, workers, and skills providers.

Creation of jobs can also lead to the displacement and loss of others. Displaced jobs are often neglected in policy announcements with Trades Unions seeking guarantees from organisations and government that any switch to green jobs in the energy sector will not come at the expense of other workers [73]. The reliance on *new* job claims without understanding the overall impact may mean *net* jobs gained is less positive than headline figures suggest [74]. And yet, job numbers, however crude, are underpinned by calculative value assessments that prioritise what can be easily counted over what may be socially or ethically significant. This approach risks marginalising broader questions about the quality, security, and distribution of employment, as well as the lived experiences of those whose livelihoods are displaced. By privileging numerical growth, such assessments can obscure the trade-offs involved and foreclose more participatory conversations about what kinds of work should be supported, for whom, and why.

From a local economy perspective, beyond local procurement and jobs, additional forms of social value in BCL are directed to the VCSE sector to help ensure a range of voices are heard and that communities are supported to take action on climate and energy, something that communities value in support of the principles of a just transition. We suggest that being heard is an essential civic quality that is inherent to

participatory processes.

The BCC Social Value policy and its application through the TOMs framework struggles however, to properly account for VCSE engagement in the *supply chain*. There are arguments on both sides here as to the merits of using local volunteers / VCSEs compared to creating paid jobs, for example, in the use of volunteers ‘[the VCSEs] were basically saying, ‘Well, look, we've got these volunteers. We're engaged in the community we've got these people involved, and yet you're not giving any weight to that whatsoever'... [but] if the council is interested in local employment, then maybe volunteers delivering a service is less good than an employee delivering a service (P5). There are contradictions in the way the TOMs methodology does and does not recognise the value of local SMEs or VCSEs. A main contractor gains social value points by supporting local VCSEs, (through volunteering pro bono services or in-kind or financial donations), implying value just for being VCSEs. They similarly gain points by contracting with a local supplier. However, “If [a local authority] contracted directly with that local supplier, then we cannot recognise the fact [because] “procurement law butts up against social value ... we cannot favour someone based on just who they are” (P5). Again, we see the tension of measurability and financial proxies for jobs created, compared with the qualitative value of VCSEs which is difficult to capture through the quantitative valuation process.

#### 4.4. Long term and relational approaches to social value

We now consider the BCL approach to governance of energy infrastructure transformation, and how social value and participatory accountability are operationalised and developed over the longer term, responding particularly to RQ2.

With the backdrop of a “public sector which has been stripped of capability and of the ability to spend money” there is a need for frameworks “to make it simple for private sector companies to work with public sector bodies and deliver on the targets that the public sector has around energy reduction, cost reduction, carbon reduction” (P7). Social value is thus recognised as a legitimate way of bringing private finance to bear on public sector outcomes, and in balancing objectives:

*“...you then set a social value requirement that meant you had to do the nice fat juicy project but also the social value projects ... the private sector understands that, they would see that that's a legitimate ask. ... [the private sector] sort of get that the government or the public sector has multiple objectives they're trying to hit.” (P8).*

We suggest a tension between social value as added value, which must be measured and calculated, and social value as an intrinsic part of the operation of a values-based business [19]. In the case of BCL, both are in play: social value is a significant part of the contract, measured as added value using the TOMs framework; on the other hand, the 20 year duration of the contract opens an opportunity for social value to be embedded as a core part of their operations – arguably less easy to measure and account for, but more valuable. Tables 2 and 3 earlier in this section outline some of the potential for additional social benefit delivered through the contract.

This 20-year duration means that instead of repeated competitive tendering, there is a need for ongoing accountability mechanisms. These need to be robust and transparent in delivering sufficient oversight of BCL activities by Bristol City Council, and in establishing who has power in shaping the approach to scrutiny:

*“..there'll be a collective accountability to monitor [and] to make sure it's performing.” (P2).*

*“Ameresco has to present a business case that gives value for money every single time, and each of those will have to go through an approvals process... [with] transparent pricing, ...so there's nothing hidden” (P4).*

Thus far it is unclear to what extent power exists beyond the contracting parties (including cross-party scrutiny at councillor level), with planned community fora being one mechanism for greater representation although they are yet to be established. Contract management by local government procuring social value should be both outcome and

process based [75], with relational accountability processes as important as the quantifiable social value reported through the Social Value Portal. These processes are important, and highlight how the longevity of BCL can lower costs:

*“... the benefits are clearly if you can make [BCL] work, you can avoid the costs of reprocurring ... and you can get going and replicate the successes... for councils as well [with] limited resource internally, constantly going out to several sub subcontractors ... I think the most successful projects are where the clients have strong contract management capability”* [P9].

Environments of trust have much lower transaction costs – indeed as P4 said, *“everybody hopes that that contract is left in a drawer and never looked at again. And if it doesn't work as a partnership, a genuine partnership, then it will struggle.”* Whilst there is potential for greater conflict as the partnership evolves, the partners clearly hope that this is not an outcome.

The long-term contract has significant benefits for galvanising the local supply chain with P1 noting that engagement with the local supply chain was *‘really important to us’* suggesting that building trust with local suppliers is key so that it is worth engaging and potentially taking on new employees and undertaking training to deliver over a longer term. Indeed, skills and training in low carbon technologies has been identified locally and nationally as an issue [76] [77], and one which BCL can help unlock:

*an immediate constraint is skills and workforce. So even if we had the money right now, the market's not there ... [City Leap will] help us make the market, give certainty, and then the market would be filled. So that skills pipeline is just not there (P2)*

BCL's social value commitments to training include apprenticeships and engaging with local schools to encourage youngsters into upcoming green jobs which might not yet exist. Conversations with local colleges and the regional authority indicate that BCL is engaging with training providers to ensure that there is suitable local training available to fill upcoming BCL roles in energy infrastructure and service delivery.

The long-term duration of BCL means that relational practices can be established that do not rely on continual measurement and do not impose significant administrative burdens; something that is difficult, if not impossible, within short-term contracting cycles. Crucially, long-term relationships can also create the space for participatory value practices to take root: mechanisms through which local communities, workers, and supply chain partners are not merely recipients of benefits but active participants in defining what those benefits should be – something recognised as an important outcome both by community respondents and by BCL as shown in their business plans. In this light, the 20-year duration of Bristol City Leap is not simply a contractual fact, but a political opportunity to reshape how value is understood, negotiated, and realised in the pursuit of a just energy transition.

## 5. Conclusion

In this paper, we examine how social value is codified, measured and procured in the context of net zero delivery in the UK, using the 20-year Bristol City Leap joint venture for low carbon energy infrastructure and service delivery as a case study.

In our exploration of how numerical and participatory approaches to social value might provide complementary outcomes for long term civic energy investment, we find that while the use of National TOMs and similar measurement frameworks offers procedural clarity, comparability, and legal defensibility, it also entrenches a calculative logic of valuation. This logic prioritises what is measurable and commensurable, reducing social value to a numerical calculation, often at the expense of more contextual, relational, and intrinsic forms of value which can support a more just transition. The adoption of such frameworks tends to benefit larger firms, potentially sidelining smaller VCSEs and SMEs, despite their foundational role in delivering locally grounded and socially embedded benefits. Indeed, many of the values held by communities and local actors - such as participation, belonging, and wellbeing -

are difficult to quantify yet remain crucial to the long-term success and legitimacy of infrastructure transitions.

The 20-year BCL model, however, enables investment in longer-term relationships, workforce development, and supply chain integration. This is essential in the context of city decarbonisation, where benefits can spill over into decarbonisation efforts beyond those undertaken by such a contract. Skills gaps addressed through investment in training by BCL then expands the available workforce resulting in further local employment and economic benefit, accelerating overall progress to net zero. Social benefit is further achieved through the way that the core aims of the partnership are delivered. These include investing in the energy efficiency of social housing to address fuel poverty or setting up community fora to engage a wider community in decision making. This structure not only facilitates more stable and sustained social value delivery but also opens space for participatory approaches to valuation. Through stakeholder engagement, and co-productive relationships with local VCSEs and community actors, BCL has the potential to enact a more pluralistic and negotiated understanding of value - one that moves beyond fixed metrics toward more dynamic, participatory forms of governance for net zero.

With the necessity of attracting private finance to achieve energy infrastructure transformation, we argue that future models of public-private infrastructure partnerships should aim to hybridise calculative and participatory approaches to social value. Longer-term contracts, like BCL, are particularly well-suited to support such hybrid approaches, offering the temporal scope required to build trust, foster deliberation, and embed intrinsic values into ongoing operations – a positive approach so far in evidence with BCL. Decision-support tools like TOMs can provide a baseline of comparability and accountability, but they must be complemented by participatory processes that allow communities and stakeholders to shape what counts as valuable in a given context. We see how this is operationalised, albeit it at a small scale, through the BCL community energy fund. Ultimately, the case of BCL demonstrates that social value in net zero procurement is not simply a matter of contractual obligation but a question of political and ethical judgment about whose voices matter, what futures are imagined, and how public purpose is defined and delivered in pursuit of city-scale energy transformations. As such, social value should be treated not only as a measurable output but as a continuous, participatory process; one that evolves alongside the very communities and infrastructures it seeks to support. This should result in a city better prepared and equipped to address the needs of the net zero transition across its infrastructure, communities and businesses.

Future efforts - both academic and policy-focused - should prioritise institutional designs that embed participatory valuation within procurement processes, treating social value not merely as something to be measured, but as something to be collectively defined and negotiated over time.

## CRedit authorship contribution statement

**Caroline Bird:** Writing – review & editing, Writing – original draft, Supervision, Project administration, Methodology, Investigation, Funding acquisition, Formal analysis, Data curation, Conceptualization. **Emilia Melville:** Writing – review & editing, Writing – original draft, Project administration, Methodology, Investigation, Formal analysis, Data curation, Conceptualization. **Jack Nicholls:** Writing – review & editing, Writing – original draft, Project administration, Methodology, Investigation, Formal analysis, Data curation, Conceptualization. **Colin Nolden:** Writing – review & editing, Writing – original draft, Methodology, Investigation, Formal analysis, Data curation, Conceptualization.

## Declaration of competing interest

The authors declare that they have no known competing financial interests or personal relationships that could have influenced the work

reported in this paper. Note that two of the authors, through external consultancy work, have a role in evaluating the BCL community energy fund although this is not considered to be a competing interest but rather a benefit to the research.

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**Appendix A. Bristol City leap KPIs**

BCL Initial Summary Business Plan [3] specified KPIs and targets for Bristol's energy infrastructure to be achieved over the first five years. The contractually agreed energy infrastructure KPIs by Ameresco are listed below

1. C.140,000 t of carbon saving
2. C.180 MW of zero carbon energy generation assets deployed
3. C.327GWh of zero carbon energy generated
4. C.£22 m of energy efficiency measures deployed
5. C.£61.5 m of social value, including c. £50 m of contracts to be delivered by local suppliers

To deliver the above, Ameresco estimated that Bristol City Leap would need to invest £424 m into low carbon energy infrastructure such as solar, wind, heat networks, heat pumps and energy efficiency measures - all of which will support Bristol meeting its carbon reduction ambition of becoming carbon neutral by 2030.

It states the following specific ‘strategic goals’:

- Make the Council's own operations carbon neutral by 2025 (covering its direct energy ‘Scope 1’ and transport emissions ‘Scope 2’)
- Retrofit the Council's social housing, which encompasses c27,500 properties and around 17% of Bristol's housing stock, achieving a minimum Energy Performance Certificate Band C by 2030

...and details the following ‘benefits’ resulting from Low Carbon Energy Infrastructure investment:

1. C£135.5 m heat pump investment for heat decarbonisation outside heat network zone
2. C£83.7 m energy efficiency investment to reduce demand and optimize electrification of heat solutions
3. C£86.7 m renewable energy investment to develop renewable generation
4. C158GWh of energy generated from renewable assets
5. Campaign of key investment awareness to catalyse local green economy and resources

Vattenfall's accompanying plan for heat network development specifies the following to be delivered:

1. C120GWh of zero carbon heat delivered to customers in Bristol
2. Heat network growth with 10GWh of heat demand added to network every year for 20 years (key KPI)
3. £200 m infrastructure investment
4. Reduce carbon content of heat to 60gCO<sub>2</sub>/kWh in 2030 and 40gCO<sub>2</sub>/kWh in 2040 (KPI)

**Appendix B**

The table below shows Social Value committed to in the Bristol City Leap contract, and what was achieved in its first year of operation – as identified in the published summary business plans in 2022 and 2024 [3] [61].

**Table B1**

BCL social value commitments.

	Value	% of total SV	Achievements in 2023
Total social value commitment to be verified through the SV Portal	£61 m		
Made up of:			
Local contracts	£50 m	82%	£3 m
Of which MSME	£7 m	11.5%	
Other reportable commitments			
a minimum of 410 Bristolians employed on BCL projects			102 jobs
Payment of at least real living wage			
Community outreach programme [which] will include:			Over 50 weeks of placements and work experience
<ul style="list-style-type: none"> <li>• encouraging young and/or unemployed people into gainful jobs through mentoring support,</li> <li>• schools / college visits and engagement, including highlighting opportunities for quality employment in the “green economy</li> </ul>			

(continued on next page)

Table B1 (continued)

	Value	% of total SV	Achievements in 2023
<ul style="list-style-type: none"> <li>work placements</li> <li>over 700 weeks of apprenticeships.</li> </ul>			
Volunteer hours			350 h
'Additional social value commitments'			
Financially quantified 'additional' social value – made up of:	£5.1 m		
Community benefit fund (non-energy projects) – linked to heat sales, estimated value over lifetime of partnership (20 years)	£2.8 m		(in 2025)
Community energy fund (total over first 5 years)	£1.5 m		launched
R&D Innovation fund (total over first 5 years)	£0.5 m		(in 2024)
Support to other local organisations for first 5 years (BGCP/CAF - £30 k/year), Action Net Zero (£30 k/year), Grassroots Communities (£6.5 k/year), an educational space (£5 k/year), CSE Energy advice line (£20 k/yr))	£0.45 m		Yes, but unquantified
Unquantified 'additional' social value			
<ul style="list-style-type: none"> <li>launching a crowdfunding platform to enable Bristolians to invest in and own Bristol City Leap energy projects – estimated £6 m</li> </ul>			(in 2024)
<ul style="list-style-type: none"> <li>Production of BCL EDI strategy, impact report, and EDI KPIs</li> </ul>			–
<ul style="list-style-type: none"> <li>Engagement with Bristol Disability and Equality Forum – to ensure disabled residents are not excluded from CL operations</li> </ul>			–
<ul style="list-style-type: none"> <li>Work with CSE and others to develop and finalise the No Cold Homes strategy and reduce fuel poverty</li> </ul>			–
<ul style="list-style-type: none"> <li>Establishing a Bristol City Leap Community Forum to enable Bristolians to feed into strategy and decision making</li> </ul>			

### Appendix C. Summary of documents analysed

Bristol City Council Cabinet, Scrutiny and full council documents and recordings of meetings:

- Launch of BCL Prospectus, 2018 [54]
- BCC Cabinet, April 2019, approval for BCL partnership procurement
- BCC Cabinet July 2020 re-commencement of procuring strategic partner
- BCC Cabinet, January 2022, BCL procurement update and request for further funding to complete procurement
- BCC Cabinet 5 April 2022, Appointment of preferred bidder
- BCC Overview and Scrutiny Management Board - Monday, 5th December 2022 (video recording, papers) [65]
- BCC Cabinet – Tuesday 6 December 2022 (video recording, papers) [64] [57]
- BCC Cabinet, September 2023 corporate estate decarbonisation strategy and role of BCL
- BCC Cabinet decision on City Leap Power Purchase Agreement 2024

Social Value policy and frameworks

- BCC 2021 Social Value Policy [78]
- BCC 2019 Social Value Policy [63]
- BCC Social Value Measures Table 2019 (excel) (Version applicable to BCL decision)
- BCC Social Value Measures Table 2025
- BCC Social Value Policy Refresh - January 2019 - Cabinet Decision [63]
- The National TOMs 2019 – Engaging with Stakeholders Nov 2019 [62]
- National TOMs 2022 open-source spreadsheet
- National Social Value TOMs 2020 Excel spreadsheet

*Analysis of social value policy and frameworks included detailed analysis of the rationale behind various TOMS measures, and the approach to stakeholder participation in selection of national TOMS for use locally.*

City Leap documents

- Bristol City Leap Summary of Initial Business Plan 2022 (Dec 2022) [3]
- Bristol City Leap Business Plan Summary 2024–25 [61]
- Bristol City Leap Prospectus (2018) [55]
- City Leap tender documents published on Pro-contract by Bristol City Council including tender evaluation criteria
- Community Participation summary report for Bristol Energy Network, July 2021 [70]

### Data availability

Data will be made available on request.

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