**BOSNIA AND HERZEGOVINA**

**FEDERATION OF BOSNIA AND HERZEGOVINA**

**Project BiH10/00103203 „Scaling-up Investment in Low Carbon Public Buildings in Bosnia and Herzegovina“ funded by Green Climate Fund (GCF) through the United Nations Development Programme in Bosnia and Herzegovina (UNDP BiH)**

**TERMS OF REFERENCE FOR CONSULTANCY SERVICES**

**Development, Organization and Delivery of Trainings for various stakeholders in the field of Energy Efficiency**

1. **Background**

**Scaling-up Investment in Low-Carbon Public Buildings**

Tackling Climate Change is a priority for the European Union who has set targets for reducing greenhouse gas emissions progressively up to 2050. The Key climate and energy targets are set in two progressive documents: the "2020 climate and energy package" included in the "Europe 2020 Strategy for smart, sustainable and inclusive growth" and the "2030 Climate and Energy Framework", defined to put the EU on the way to achieve the transformation towards a low-carbon economy as detailed in the 2050 low-carbon roadmap. The former, enacted in legislation in 2009, aimed at reducing by 20% greenhouse gas emissions (from 1990 levels), at improving energy efficiency and at increasing the share of energy from renewables to 20% by 2020. The latter proposes new targets and measures forwarding the commitments beyond 2020 and it builds on the 2020 Climate and Energy Package. The "2030 Climate and Energy Framework" shows an ambitious commitment to reduce greenhouse gas emissions in line with the 2050 Roadmaps and sets three key targets for the year 2030: at least 40% cuts in greenhouse gas emissions (from 1990 levels), at least 27% share for renewable energy and at least 27% improvement in energy efficiency.

This framework was adopted by EU leaders in October 2014 and it is also in line with the longer term perspective set out in the Roadmap for moving to a competitive low carbon economy in 2050, "The Energy Roadmap 2050". This explores the transition of the energy system in ways that would be compatible with the 80% domestic greenhouse gas reductions target while also increasing competitiveness and security of supply. The roadmap requires the reach of the target of cutting of 40% GHG in comparison to 1990 levels by 2030 already endorsed as a milestone as part of the "2030 Framework". Moreover, the implementation of the "2030 Energy and Climate Framework" is a priority in follow up to the Paris Agreement, the first multilateral agreement on Climate Change covering almost the global emissions, which vindicates the EU's approach. The international climate agreement aims to keep global warming below 2°C, in accordance with the recommendations of the Intergovernmental Panel on Climate Change (IPCC). The key features of the Paris Agreement include: GHG reduction with a long-term goal of keeping the increase in global average temperature to well below 2°C above pre-industrial levels and limit the increase to 1.5°C; a dynamic and transparent mechanism to take stock of ambition over time, an ambitious solidarity package with adequate provisions on climate finance. Moreover, the agreement promotes individual and collective action on adaptation, with the aim to enhance climate resilience and reduce climate vulnerability. It also recognizes the role of non-Party stakeholders in addressing Climate Change, including cities, other subnational authorities, civil society, the private sector and others who are invited to scale up their efforts and support actions to reduce emissions, build resilience and decrease vulnerability to the adverse effects of Climate Change.

**Local stakeholders** and authorities have a key role in the climate change challenge; therefore, it is of utmost importance for local stakeholders to improve and strengthen their knowledge and skills in the areas of Energy management, Energy efficiency, Project development/implementation/monitoring, local investment frameworks and financial mechanisms to be more successful in adapting to/mitigating climate change.

1. **Purpose**

The purpose of this assignment i.e. developing, organizing and delivering trainings for various stakeholders in the field of Energy efficiency is to strengthen general and specific knowledge and improve skills of energy professionals, engineers, owners of private energy companies, local administration employees involved in the EE field to better face challenges of climate change.

1. **Objective**

Objective of this assignment is: preparation, organization and delivery of trainings for various stakeholders in the field of Energy efficiency in BiH. The assignment will be activity implemented under project “Scaling up investment in Low-Carbon Public Buildings’’.

1. **Overview of the assignment**

The assignment will consist of preparation (organization and delivery) of trainings that will cover 3 groups of topics (3 Modules). These training sessions will be organized and delivered in 12 one-day, 1 three day regional workshop-CRO,SRB,BIH at location to be agreed with UNDP and 4 one day training on four locations-Sarajevo, Banja Luka, Mostar and Brčko.

Trainings are planned to be held in-person respecting all imposed COVID measures at the moment of their delivery. (The assignment might be fulfilled online depending on the situation with COVID and upon UNDP’s instruction.)

A training session will include a lunch and 2 refreshments during one-day session. A three-day training session will include a lunch and 2 refreshments each day. It will be service provider’s obligation to organize trainings in suitable venues at each location.

*Travel and accommodation expenses for participants of the training will not be covered by the Contractor, but expenses related for delivery of the “Trainings for various stakeholders in the field of energy efficiency for decarbonization” such as enough coffee brakes, lunch for all participants, materials for all participants, etc. must be included in the financial proposal and covered by the Contractor.*

**The trainings will be organized in 3 modules containing following topics:**

Modul 1: Energy efficiency and energy management, RES, National Investment Framework (NIF)

Modul 2: Project development, implementation, and monitoring related the investments in EE and RES

Modul 3: EMIS -regional perspective and application

3.1. EMIS experience on the regional level, lessons learned and possibilities for cooperation.

3.2. EMIS training for the senior management in the public institutions, Cantons, municipalities (Ministers, Mayors, Directors etc).

**Total number of sessions to be provided:**

Modul 1 – 6 one-day sessions at 6 different locations in BiH (3 FBiH, 2 RS, 1 – Brčko district)

Modul 2 – 6 one-day sessions at 6 different locations in BiH (3 FBIH, 2 RS, 1 – Brčko district)

Modul 3 – 1 three-day regional workshop-CRO,SRB,BIH) at location to be agreed with UNDP

4 one day training on 4 locations-Mostar, Banja Luka, Brcko and Sarajevo

**Expected number of participants per modules (subject to change depending on COVID measures)**

Modul 1 – around 25 per session – total for 6 sessions: 150

Modul 2 – around 25 per session – total for 6 sessions: 150

Modul 3 – 3.1. around 40 per session – total for 1 session: 40

3.2. around 25 per session – total for 4 sessions: 100

In total about 440people shall be trained. However, the final number could vary and shall be determined during project implementation.

**Expected structure of participants by modules**: persons involved in the field of energy management and efficiency like (but not limited to):   
- energy professionals, state/entity/cantonal/local government employees, owners of solar/wind/bio-mass plants, financial experts, banks, university, relevant NGOs for the EE field, project developers, consulting companies, policy makers. – Modul 1

- energy professionals, state/entity/cantonal/local government employees, representatives of public and private companies, financial experts, banks, university, relevant NGOs for the EE field, project developers, consulting companies – Modul 2

- energy professionals, state/entity/cantonal/local government employees, representatives of public and private companies, owners of solar/wind/biomass plants, financial experts, banks, university, relevant NGOs for the EE field, project developers, consulting companies, policy makers - Modul 3 – 3.1

- senior management in the public institutions, Cantons, municipalities (Ministers, Mayors, Directors etc.)-Modul 3 – 3.2

**Description of tasks/outputs**

Within the above context, the consultant tasks will be as follows:

1. **Detailed plan and methodology** which includes expected timetable, schedule of activities, documented references and description of execution of the outputs listed in the ToR.
2. **Final Agenda with identified topics for each Module**. Agenda and topics should reflect potential Lecturer’s opinions for training needs. (A learning needs analysis will help to highlight skills/knowledge/competencies that need developing among energy professionals, engineers, and construction companies, State/entity/cantonal/local administration employees, NGOs etc.).   
   All the tasks should be approved by the UNDP/Project Management team.

**Training topics**

Each training session should cover general topics from specific Module.

Modules and general topics are following:

Modul 1: Energy efficiency and energy management, RES, National Investment Framework (NIF)

Modul 2: Project development, implementation, and monitoring related the investments in EE

Modul 3: EMIS -regional perspective and application

3.1. EMIS experience on the regional level, lessons learned and possibilities for cooperation.

3.2. EMIS training for the senior management in the public institutions, Cantons, municipalities (Ministers, Mayors, Directors etc).

Topics and sub-topics expected to be covered by Specific Module are (but not limited to):

**Module 1: Energy efficiency and energy management, National Investment Framework (NIF)**

**Topic 1.1: Energy efficiency and energy management**

* Systems of energy management in BiH
* Energy infrastructure
* Legislation and regulations in the field of energy efficiency
  + **With special emphasis in the training session to developed (Topic 1.2) National Investment Framework in BIH**
    - Background of NIF
    - Low-Carbon Investment Framework
    - Minimum Eligibility Requirements for Investment projects
    - Operational Guidance for NIF
    - Energy Savings, Monitoring and Evaluation
* Restoration of buildings in terms of increasing energy efficiency and energy conservation
* Passive houses and nearly Zero Energy Houses
* Building diagnostics and measurements
* Improving energy efficiency by implementing various measures
* Energy efficiency measures (from aspects of Civil/Mechanical/Electrical engineering)
* Reducing consumption in buildings (heating, climatization, water, electrical power, lighting)
* Heat pumps for heating, cooling, ventilation and air conditioning
* Automatic control and regulation
* Photovoltaic power stations and electric power generation in households, including battery systems
* Electric vehicles
* Feed-in tariffs for local power photovoltaic systems, prosumers
* The use of recycling technologies in the construction and reconstruction
* Use of renewable sources of energy
* Role of big Infrastructural systems in EE (Electric, Public lighting, Water/Sewage, District heating, Natural Gas, Public transportation)

**Topic 1.2: National Investment Framework (NIF) in BIH**

* Background and purpose of NIF
* Low-Carbon Investment Framework
* Minimum Eligibility Requirements for Investment projects
* Operational Guidance for NIF
* Energy Savings, Monitoring and Evaluation

**Topic 1.3**: *ESCO financial mechanism*

**Module 2: Project development, implementation, and monitoring**

**Topic 2: Project development, implementation, and monitoring**

* Basics of Project Cycle Management
* Project Planning
* Developing Logical Framework Matrix
* Writing Project Proposals
* Implementation of Projects
* Monitoring and Evaluation of Projects
* PCM for the field of Energy efficiency in BiH (specifics, hints, financial opportunities)
* Domestic and international climate change funding sources, approach and criteria for financing

**Module 3:** Modul 3: EMIS -regional perspective and application

3.1. EMIS experience on the regional level, lessons learned and possibilities for cooperation.

3.2. EMIS training for the senior management in the public institutions, Cantons, municipalities (Ministers, Mayors, Directors etc).

**Topics:**

**3**.1 Exchange of experience from regions, lessons learned, implementation and transfer of EMIS ownership to state and entities levels of authorities etc.

**3**.2 Basic of EMIS, its role and importance for management level as well as the benefits that the same can have with its full implementation etc.

**The above-mentioned key topics are expected to be covered. However, this list is only indicative, and the consultant must suggest further/alternate topics for final agenda, which must be approved by UNDP prior to implementation.**

1. **Following tasks listed in Deliverable 3**:

* Design training sessions and their facilitation in conjunction with UNDP
* Prepare training documents (invitations, agenda, design of ppt, information letters....)
* All documents (invitations, agenda, design of ppt, information letters etc.) will have to have UNDP branding. Please contact UNDP for further input.

(All the tasks should be approved by the UNDP/Project Management team).

1. **Deliver training activities and materials for each participant**. Hold 12 (twelve) one-day, 1 (one) three day and 4 (four) one-day events in BiH, of which are at least three (3) different sites in FBiH, two (2) in RS, and one (1) in Brčko District. Training sessions will last one day each, except for trainings related to Module 3 (3.1) which will be implemented as three-day session. Each Module will have the same content just will take place at other locations and on other dates. Location and dates have to be agreed with UNDP. Preliminary, trainings should be held from September 2022 to December 2022. Evaluate training sessions a feedback form after each event. Results on evaluation should be included in Final Report.
2. **Final Report on the outcomes of the facilitated trainings for Various stakeholders**. Develop a comprehensive final report on the process of facilitation of the Various stakeholder training, including main accomplishments, future recommendations, lessons learned, agenda and other documents, list of participant’s signatures from the events.

For each of the key documents the contractor will, prior its drafting, present to the Project Manager and the Monitoring and Evaluation experts an Annotated Proposal for document's Contents and structure.

Each document will be presented as a draft version, to be finalized after interactive participatory discussions (if envisaged), and upon PM's comments (if any), and clearance.

Each output by the consultant needs to contain full set of reference documents used (including exact data references) and include full list of sources of information, meeting attendants, photos, minutes from meetings and information compiled.

**Within the Consultant’s offer – the consultant should describe in detail its own proposed methodology for each of the tasks listed above.**

It is important to note that the companies selected to carry out the activities envisaged by the ToR will be requested to **submit the outputs in local language, with final report in both English and local language versions.**

**4. Deliverables and deadlines**

The deadlines for delivery of Deliverables are presented below:

|  |  |  |
| --- | --- | --- |
| **Activity (as per ToR)** |  | **Estimated completion deadline** |
| **Deliverable 1:**  Detailed plan, methodology which includes expected timetable, schedule of activities, documented references and description of execution of the outputs listed in the ToR. | 20 % | August , 2022  (Submission of methodology to UNDP) |
| **Deliverable 2:**  Completion of Module 1 (6 one day sessions) supported with all necessary correspondent documents. Reports to be submitted and approved by UNDP/Project Management team. | 20% | October 2022 |
| **Deliverable 3:**  Completion of Module 2 (6 one day sessions) supported with all necessary correspondent documents. Reports to be submitted and approved by UNDP/Project Management team. | 20% | November 2022 |
| **Deliverable 4:**  Completion of Module 3 (1 three day and 4 one day sessions) supported with all necessary correspondent documents. Reports to be submitted and approved by UNDP/Project Management team. | 30% | September 2022 |
| **Deliverable 5:**  Final report submitted and approvedby UNDP/Project Management team. | 10% | December 2022 |

For each deliverable, the UNDP Project team will have up to 15 calendar days to review outputs, provide comments / feedback and/or approve report.

The Offeror should bear in mind that UNDP has proposed an intensity of expected outputs and deadlines.

These deadlines have been interlinked among other activities. However, in its Methodology, the Offeror might suggest different intensity and timeliness of performance, in which case this shall be duly justified.

**5. Reporting:**

During the implementation of envisaged tasks, the consultant will provide to the UNDP Project Manager and written and/or oral information and/or reports with: (i) description of on-going progress made, (ii) problems encountered and respective measures undertaken or to be undertaken, (iii) the methodology applied, and (iv) intended forthcoming activities, all concerning the implementation of tasks envisaged by the contract, by:

a. Personal contacts and operational communication through the Team Leader as needed.

b. Quarterly or Periodical Reports in writing if requested,

c. *Ad-hoc* reports if needed and/or requested,

**d. Progress reports after each 3 one-day sessions and 1 three-day session held containing information on training details (location, date, number and gender of participants, institution/company - all details on report form to be agreed with UNDP)**

**e. Final Report at the end of the contract** will be developed as a comprehensive final report on the process of facilitation of the trainings, including main accomplishments, future recommendations, lessons learned and agenda. Final reports also must contain following:

* 1. Participant signature lists,
  2. Filled in participant evaluation questioner forms on success of the training,
  3. Photos taken during trainings.
  4. Overview of total people trained
  5. Number of people trained
  6. Number of trained women, (%) from total number of trained people,
  7. Other relevant data/indicators upon request by UNDP

**6. Consultant's references and qualifications of proposed team members**

With expression of interest should be presented the company’s organizations background, providing information on its background, description of present activities and past experience, including a reference list, company's experience in similar projects all focused on assignments to be implemented by the contract.

The information within the proposal/methodology of the selected company will also include:

* resources in terms of personnel and facilities necessary for the contract's performance;
* the general management approach towards the actual project and
* members of the contractor's Team of Lecturers, including the Team Leader and all other proposed Expert Lecturers. (For all team members CVs should be submitted).

The Consultant should be a qualified firm or joint venture of firms (up to 3 companies for a joint venture) that have demonstrated experience in providing of similar services (of several sites at the same time). The firm must propose a team capable of successfully carrying out all aspects of the ToR with in-depth experience in executing similar consultancies. The Consultant shall demonstrate his capability to mobilize enough skilled staff for carrying out the project activities within the allocated timeframe and include all necessary required experts as part of the proposal by including in the technical proposal the Curriculum Vitae of the proposed key staff, including educational background, relevant working experience in similar projects, and by confirming their availability during the period of the contract. Due to complexity of the tasks, Service Provider will need to appoint sufficient number of staff who will be responsible for keeping track of plans, activities, progress reports and ongoing issues.

Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services.

The consultant will submit the following documents as proof of fulfillment of the stated requirements (in local language):

Company information: name, registration, address, telephone number, email address, year of establishment, contact person for the project, fields of expertise,

* Confirmation on no obligations relating to the payment of direct and indirect taxes in accordance with the relevant laws of Bosnia and Herzegovina (may not be older than three (3) months) or with the relevant law of the country from the EOI submitter

The shortlisting criteria are:

Qualified consulting firms and their staff for this assignment should have extensive experience in the services mentioned above. The required minimum experience should be demonstrated by at least (3) three assignments that included similar tasks during the last five (5) years, including value of contract for consulting services, location, name of the Client, type of services provided, contract period of execution, a brief description of the contract(s).

Consultants may associate with other firms in the form of a joint venture or a sub consultancy to enhance their qualifications. All the members of the joint venture shall be jointly and severally liable for the entire assignment. However, the experience of the sub-consultant will not be considered while shortlisting.

CVs of Key Experts are not required /will not be evaluated/ at the shortlisting stage (expression of interests).

During the proposal stage selected consultant within its technical-financial proposal will submit:

**Team of specialist eligibility**:

The Contractor (Consortium) must have a proposed team of at least five (5) required experts as per this ToR.

1.  **Team Leader** (Civil Engineer/Architect, expert lecturer – for Module 1) – **Expert 1**

* Architect or Civil Engineer, at least 10 years of relevant experience
* Authorization/license for conducting energy audits for complex buildings systems – MODUL 2 in FBIH (issued by Federal Ministry of Physical Planning) or Republika Srpska (issued by Ministry of Spatial Planning, Civil Engineering and Protection of Environment of Republika Srpska).

1. Expert Lecturer (**Mechanical Engineer**, expert lecturer – for Module 1) – **Expert 2**

* Mechanical Engineer, at least 5 years of relevant experience
* Authorization/license for conducting energy audits for complex buildings systems – MODUL 2 in FBIH (issued by Federal Ministry of Physical Planning) or Republika Srpska (issued by Ministry of Spatial Planning, Civil Engineering and Protection of Environment of Republika Srpska)

1. Expert Lecturer (**Electrical Engineer**, expert lecturer – for Module 1) – **Expert 3**

* Electrical Engineer, at least 5 years of relevant experience Authorization/license for conducting energy audits for complex buildings systems – MODUL 2 in FBIH (issued by Federal Ministry of Physical Planning) or Republika Srpska (issued by Ministry of Spatial Planning, Civil Engineering and Protection of Environment of Republika Srpska)

4. **PCM Lecturer** (Expert in Project Cycle Management – for Module 2) – **Expert 4**

5. Financial Expert (expert lecturer for Module 1) – **Expert 5**

* University graduate economist with minimum 5 years of experience.
* Experience in financing mechanisms for energy efficiency and/or renewable energy sources and the financial modelling of such projects

6. **ESCO Lecturer** (Expert for ESCO and Financial Mechanisms in EE – for Module 3) – **Expert 6**

For **Expert 4 (PCM) and Expert 6 (ESCO) requirements** are as follow:

* At least 5 years of relevant experience with degrees in mechanical, electrical, architecture and/or civil engineering, law/economics, or another related field.

Professional profile experience to be provided should refer to:

* Mechanical, electrical, architecture and/or civil engineering, law/economics or other relevant field with references in previous similar projects (similar size and scope),
* Previous experience/successful involvement in similar internationally supported projects,
* Team Leader and other team members should be familiar with the content area of the Energy Management, Energy Efficiency, Climate change and Decarbonization, preferably through both professional experience and educational background,
* Have had some prior training and facilitation experience, either in the UN or elsewhere,
* Knowledge and previous experience on and capacity for interactive participatory communication and cooperation with stakeholders, facilitating their involvement in Project activities,
* Strong writing skills – with experience in preparing user-friendly tools for use by practitioners in the field,
* Good and proven experience and skills on general communication and co-operation,
* Good and proven experience in dealing with governments and local authorities,
* Knowledge and understanding of relevant UN and other International Conventions
* Good knowledge and understanding (i) of the governance structure of BiH, (ii) of relevant sectoral

strategic documents, (iii) of (project relevant) sectoral aspects of sustainable development,

* Experience with facilitating inter-institutional cooperation and stakeholder involvement,
* Good understanding of existing laws, rulebooks, standards in BiH related to the topic,
* Experience with working in related projects (design, engineering (civil, architecture, electric and mechanical), energy, HVAC, renewables, energy efficiency, ESCO financial mechanisms, project management…),
* Good knowledge and understanding of the legal and institutional setting in BiH,
* Excellent and proven experience in dealing with national government partners.

Note:

UNDP will provide trainer to deliver topics related National Investment Framework (NIF) in BIH (topic 1.2):

* Background and purpose of NIF
* Low-Carbon Investment Framework
* Minimum Eligibility Requirements for Investment projects
* Operational Guidance for NIF
* Energy Savings, Monitoring and Evaluation.

**7. Key Performance Indicators and Service Level**

Key performance indicators are as follows:

* All activities completed by defined deadlines and reports delivered in time.
* All key activities and deliverables will be subject to review by UNDP team and Project partners.

**8. Price and Schedule of Payments**

Payments of the delivered services will be done according to the following timetable, each upon Project Manager’s approval:

* Deliverable 1 - 20%
* Deliverable 2 – 20%
* Deliverable 3 – 20%
* Deliverable 4 - 30%
* Deliverable 5 - 10%