

## EU4ENERGY LABELLING AND ECODESIGN

**Project name:** Establishing and strengthening of capacities of the conformity assessment bodies for the implementation of Energy Labelling and Eco-design Directives

**Contract No.:** 2019/408-124

ToR N°	Act.	Title of activity	Name of candidate	Budget Category	No. of WDs	Starting	Ending
11	A3.1.2	Training on Ecodesign Implementing Measures (Case studies Water Heaters and Space Heaters)	..... (SNKE-I)	<b>Senior NKE with international experience</b>	Up to 5	February 2021	March 2021
	A3.1.2	Training on Ecodesign Implementing Measures (Case study Lamps and Luminaires)	..... (SNKE-N)	<b>Senior NKE with national experience</b>	Up to 5	February 2021	March 2021

Special COVID-19 related notice:

All the dates and organization of activities stipulated in the present document may be affected by the evolution of COVID-19 pandemic, and thus subject to changes and delays. In that case, all beneficiaries of this project and EUD would be contacted as soon as possible impacts would be detected, in order to agree on alternative options, including extension of NKEs' period of involvement and alternative ways to deliver the activities, when their availability remains valid for extension.

## 1 OBJECTIVES OF ASSIGNMENT & EXPECTED RESULTS

### 1.1 Background to the Assignment

The EU funded Project "Establishing and strengthening of capacities of the conformity assessment bodies for the implementation of Energy Labelling and Eco-design Directives" (the Project) is aimed at – among others – designing and implementing a training programme on framework Ecodesign Directive 2009/125/EC and its Implementing Measures for Serbian Conformity Assessment Bodies (CABs) as well as beneficiary institutions including Ministry of Mining and Energy (MoME), Ministry of Trade, Tourism and Telecommunication (MTTT), Ministry of Economy (ME), Serbian Chamber of Commerce (SCC) and Serbian Accreditation Body (SAB).

The proposed training programme will mainly focus on the contents of Directive 2009/125/EC and Implementing Measures thereunder, but will also cover the Energy labelling framework Regulation (EU) 2017/1369 and delegated regulations thereunder as they are indispensable parts of, and complementary to each other particularly for those ErPs which are classified as consumer products. The training programme will also cover case studies for three ErP groups as lamps and luminaires, water heaters and space heaters. Part of the tentative agenda for the proposed training programme pertaining to this assignment is as follows:

DAY 1 (DAY 3 of Training Programme)			
9 <sup>30</sup>	10 <sup>30</sup>	<b>Eco-design and Energy Labelling Regulations</b> <ul style="list-style-type: none"> <li>• Main step in development regulations</li> <li>• Setting generic and specific requirements</li> <li>• Implementing measures or voluntary agreements</li> </ul>	KE 3 and SNKE-I
10 <sup>30</sup>	10 <sup>45</sup>	Coffee break	
10 <sup>45</sup>	12 <sup>15</sup>	<b>Implementation of Ecodesign and Energy Labelling Regulations</b> <b>Case study #1: Lamps and Luminaires</b> <ul style="list-style-type: none"> <li>• Implementation of Regulations requirements</li> <li>• Harmonized standards used</li> <li>• Conformity Assessment <ul style="list-style-type: none"> <li>○ Requirement for Laboratory facilities</li> </ul> </li> </ul>	SNKE-N
12 <sup>15</sup>	13 <sup>15</sup>	Lunch	
13 <sup>15</sup>	14 <sup>15</sup>	<b>Case study #1 (cont.)</b> <ul style="list-style-type: none"> <li>○ Testing procedures</li> <li>○ Conducting testing</li> <li>○ Documenting testing results</li> </ul>	SNKE-N
14 <sup>15</sup>	14 <sup>30</sup>	Coffee break	
14 <sup>30</sup>	15 <sup>30</sup>	<b>Case study 1 (cont.)</b> <ul style="list-style-type: none"> <li>○ Documenting testing results</li> </ul>	SNKE-N
15 <sup>30</sup>	16 <sup>00</sup>	Questions / Comments / Plan for next day	
DAY 2 (DAY 4 of Training Programme)			
9 <sup>30</sup>	10 <sup>30</sup>	<b>Implementation of Ecodesign and Energy Labelling Regulations</b> <b>Case study #2: Water Heaters</b> <ul style="list-style-type: none"> <li>• Implementation of Regulations requirements</li> <li>• Harmonized standards used</li> <li>• Conformity Assessment</li> <li>• Requirement for Laboratory facilities</li> </ul>	SNKE-I
10 <sup>30</sup>	10 <sup>45</sup>	Coffee break	
10 <sup>45</sup>	12 <sup>15</sup>	<b>Case study 2 (cont.)</b> <ul style="list-style-type: none"> <li>○ Testing procedures</li> <li>○ Conducting testing</li> <li>○ Documenting testing results</li> </ul>	SNKE-I
12 <sup>15</sup>	13 <sup>15</sup>	Lunch	
13 <sup>15</sup>	14 <sup>15</sup>	<b>Implementation of Ecodesign and Energy Labelling Regulations</b> <b>Case study #3: Space Heaters</b> <ul style="list-style-type: none"> <li>• Implementation of Regulations requirements</li> <li>• Harmonized standards used</li> <li>• Conformity Assessment</li> <li>• Requirement for Laboratory facilities</li> </ul>	KE 3 and SNKE-I
14 <sup>15</sup>	14 <sup>30</sup>	Coffee break	
14 <sup>30</sup>	15 <sup>30</sup>	<b>Case study 3 (cont.)</b> <ul style="list-style-type: none"> <li>○ Testing procedures</li> <li>○ Conducting testing</li> <li>○ Documenting testing results</li> </ul>	SNKE-I
15 <sup>30</sup>	16 <sup>00</sup>	Questions / Comments / Plan for next day	

In line with the above training programme, the SNKE-I and SNKE-N will closely coordinate with the TA Team consisting of KE1/TL, KE2 and KE 3 in elaborating the training materials and delivering the training sessions. For this purpose, the members of the TA Team (KE 1, KE2 and KE3 as appropriate) will assume the outline and horizontal aspects at the beginning and the SNKE-I is expected to provide thematic and technical particularities of the Case Studies listed in the Agenda above.

## **1.2 Purpose of the assignment**

The purpose of this assignment is to develop training materials for the Case Studies on Lamps and luminaires, Water Heaters and Space Heaters under the Training on framework Eco-design Directive and Implementing Measures for CABs and other beneficiary institutions and deliver a training programme in line with the tentative agenda provided under Section 1.1 above.

## **2 SCOPE OF THE WORK**

### **2.1 General**

The selected NKEs will closely work with the KE1/Team Leader, KE2 for Conformity Assessment (the Task Leader) and KE3 for Market Surveillance as well as the Ministry of Mining and Energy (MoME) as the main Beneficiary in implementing the tasks and responsibilities and delivering the outputs expected under this assignment.

The details of the assignment are described in the following section.

## 2.2 Specific Activities

Detailed activities:

Subtasks	Activities	WDs SNKE-I	WDs <u>SNKE-N</u>
<b>A3.1.2 Training on Ecodesign Implementing Measures (Water Heaters and Space Heaters)</b>	<p><b><u>Specific Activities for SNKE-I:</u></b></p> <ul style="list-style-type: none"> <li>- Briefing by TA Team on details of the assignment (online meeting);</li> <li>- Drafting the training materials for the Case Studies on Water Heaters and Space Heaters);</li> <li>- Finalizing the training materials considering comments of TA Team and main Beneficiary;</li> <li>- Delivering the Case Studies on Water Heaters and Space Heaters</li> </ul>	5	
<b>A3.1.2 Training on Ecodesign Implementing Measures (Lamps and Luminaires)</b>	<p><b><u>Specific Activities for SNKE-N:</u></b></p> <ul style="list-style-type: none"> <li>- Briefing by TA Team on details of the assignment (online meeting);</li> <li>- Drafting the training materials for the Case Study on Lamps and Luminaires;</li> <li>- Finalizing the training materials considering comments of TA Team and main Beneficiary;</li> <li>- Delivering or the Case Study on Lamps and Luminaires</li> </ul>		5

## 2.3 Outputs to be delivered

Output	Due date
Draft Training Materials	15 February 2021
Finalized Training Materials	20 February 2021
Training Report	05 March 2021

## 2.4 Target groups

The target groups of this assignment will be:

- Serbian Conformity Assessment Bodies (CABs)
- Ministry of Mining and Energy (MoME – main Beneficiary)
- Ministry of Trade, Tourism and Telecommunication (MTTT – beneficiary institution)
- Serbian Chamber of Commerce (SCC – beneficiary institution)
- Serbian Accreditation Body (SAB – beneficiary institution)
- Serbian producers of ErP products

## 3 LOGISTICS AND TIMING

Special COVID-19 related notice:

All the dates stipulated in the present document may be affected by the evolution of COVID-19 pandemic, and thus subject to changes and delays. In that case, all beneficiaries of this project and EUD would be contacted as soon as possible, impacts would be detected, in order to agree on alternative options, including extension of NKEs' period of involvement.

### 3.1 Location

The operational base for assignment will be Belgrade.

### 3.2 Commencement date & period of execution

The assignment is expected to take place during February 2021 and March 2021. The interventions of SNKE-I and SNKE-N will be in the form of 5 WDs each.

### 3.3 Input

	TOTAL WORK DAYS (WD)	OF WHICH HOME BASED WORK DAYS*	SPECIAL REQUEST
Senior NKE with international experience	Up to 5	Up to 5	Justification for home based working days: - Mission / training material preparation - ad-hoc support to beneficiary requests in between missions

	TOTAL WORK DAYS (WD)	OF WHICH HOME BASED WORK DAYS*	SPECIAL REQUEST
			<ul style="list-style-type: none"> <li>- compiling/ drafting final report and recommendations.</li> <li>- Training input will be provided via online contribution</li> </ul>
<b>Senior NKE with national experience</b>	Up to 5		

### 3.4 Expert requirements and evaluation grid

The assignment will be carried out by one Senior NKE with international experience and by one Senior NKE with national experience.

The **Senior NKE with international experience** is expected to meet the following requirements (incl. evaluation grid):

Requirements for Senior NKE with international experience	Maximum Scoring	Explanation for scoring
<b>Qualifications and skills</b>	<b>20</b>	
<ul style="list-style-type: none"> <li>▪ A level of education which corresponds to completed university studies of at least three years in the field for which the expert is mobilized.</li> </ul>	10	BSc. 6 pts MSc. 8 pts PhD 10 pts
<ul style="list-style-type: none"> <li>▪ Working knowledge of English language</li> </ul>	10	
<b>General professional experience</b>	<b>30</b>	
<ul style="list-style-type: none"> <li>▪ Minimum 7 years of experience in the field of product compliance with technical requirements</li> </ul>	15	7-10 years 9 pts. 10-15 years 12 pts. > 15 years 15 pts.
<ul style="list-style-type: none"> <li>▪ Experience in delivering trainings on EU technical legislation on products;</li> </ul>	10	1-2 trainings 6 pts 3-5 trainings 8 pts > 5 trainings 10 pts
<ul style="list-style-type: none"> <li>▪ Experience in delivering training programmes on EU eco-design Directive and implementing measures will be an asset.</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<b>Specific professional experience</b>	<b>50</b>	
<ul style="list-style-type: none"> <li>▪ Experience in developing training materials and delivering training programmes containing conformity assessment procedures under EU technical legislation on products;</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<ul style="list-style-type: none"> <li>▪ Experience in developing training materials and delivering training programmes containing conformity assessment procedures under EU eco-design and energy labelling legislation will be an asset.</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<ul style="list-style-type: none"> <li>▪ Experience in conformity assessment and/ or preparation/ checking of technical documentation for heating appliances as specified in the Case Studies</li> </ul>	10	

Requirements for Senior NKE with international experience	Maximum Scoring	Explanation for scoring
for Water Heaters and Space Heaters respectively will be an asset		

The **Senior NKE with national experience** will be expected to meet the following requirements (incl. evaluation grid):

Requirements for Senior NKEs with national and national experience	Maximum Scoring	Explanation for scoring
<b>Qualifications and skills</b>	<b>20</b>	
<ul style="list-style-type: none"> <li>A level of education which corresponds to completed university studies of at least three years in the field for which the expert is mobilized.</li> </ul>	10	BSc. 6 pts MSc. 8 pts PhD 10 pts
<ul style="list-style-type: none"> <li>Working knowledge of English language</li> </ul>	5	
<ul style="list-style-type: none"> <li>Working knowledge of Serbian language will be an asset</li> </ul>	5	
<b>General professional experience</b>	<b>30</b>	
<ul style="list-style-type: none"> <li>Minimum 7 years of experience in the field of product compliance with technical requirements</li> </ul>	15	7-10 years 9 pts. 10-16 years 12 pts. > 15 years 15 pts.
<ul style="list-style-type: none"> <li>Experience in delivering trainings on EU technical legislation on products;</li> </ul>	10	1-2 trainings 6 pts 3-5 trainings 8 pts > 5 trainings 10 pts
<ul style="list-style-type: none"> <li>Experience in delivering training programmes on EU eco-design Directive and implementing measures will be an asset.</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<b>Specific professional experience</b>	<b>50</b>	
<ul style="list-style-type: none"> <li>Experience in developing training materials and delivering training programmes containing conformity assessment procedures under EU technical legislation on products;</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<ul style="list-style-type: none"> <li>Experience in developing training materials and delivering training programmes containing conformity assessment procedures under EU eco-design and energy labelling legislation will be an asset.</li> </ul>	20	1-2 trainings 12 pts 3-5 trainings 16 pts > 5 trainings 20 pts
<ul style="list-style-type: none"> <li>Experience in conformity assessment and/ or preparation/ checking of technical documentation for lamps and luminaires as specified in the Case Study for Lamps and Luminaires will be an asset</li> </ul>	10	

### 3.5 Evaluation of Experts - scoring

Fulfilment of the minimum requirements will not automatically lead to reaching maximum scores as presented in the Evaluation grid.

NKEs are scored against the requirements stated in the Terms of Reference section 4.2. The Experts must provide documentary proof. This includes copies of the diplomas referred to in the CV

and employers' certificates or references proving the professional experience stated in the CV. Only diplomas and experience supported by documentary proof can be taken into account.

For the NKE evaluation of each criterion, if the expert fulfils the **minimum requirement**, 60% of the maximum score will be allocated. If the expert exceeds the minimum requirement for that criterion, a percentage between 61 and 100% of the maximum score will be allocated in accordance with the explanation for scoring in section 4.2.

The NKEs must fulfil the minimum requirements for all of the criteria. If an NKE does not fulfil the minimum requirements in any criterion the Expert will be rejected from the evaluation. The latter is not the case for **asset requirements**.

## 4 Deliverables

### 4.1 Reporting requirements

Selected NKE candidates are obliged to prepare presentation and delivery training **according to the Agenda of the Course Eco-design and Energy Labelling Implementing Measures**.

The lay-out of presentation will be provided by the Technical Assistance Team (TA Team).

Within 5 WD after the end of mission, the NKE will provide a mission report to the Team Leader.

Within 10 WD after the end of the missions, the NKE will provide the Technical Assistance Team Leader with a final report, comprising:

- Finalized Training Materials
- Training Report