

## TERMS OF REFERENCE

### 2014/08/RFP – Transfer of Czech Experience: Training Program and Study Tour on Energy Efficiency in Buildings

#### 1. BACKGROUND

UNDP is supporting a portfolio of GEF-funded projects in Kazakhstan, Kyrgyzstan and Armenia aimed at promoting energy efficiency in building sector. All projects are aligned around one common objective and follow the same logical framework and structure consisting of the following components:

1. Adoption, enforcement, implementation and enhanced monitoring procedures of mandatory construction norms, building energy efficiency codes, rating system, and other policies and regulations promoting energy efficiency in buildings.
2. Education, outreach and capacity building to promote energy efficient design, application of best practices and technologies on energy efficient construction.
3. Demonstration of benefits of energy efficient design, construction and renovation of residential and public buildings.

More information about projects can be found at regional web-site: [www.beeca.net](http://www.beeca.net) and individual project sites: [www.nature-ic.am](http://www.nature-ic.am) (Armenian Project); <http://eep.kz/en/> (Kazakhstan Project).

The energy efficiency assessment is not new in the Czech Republic. Since 2001, there is a methodology for energy audits in place and certificates for the building envelope in place. The Czech Republic has further experience with transposition of the EPBD Directive (2002/91/EC Directive on the energy performance of buildings, recast by 2010/31/EU Directive). The Czech Republic had been preparing 6 years to adopt the original directive in full scale in 2009.

Furthermore, the Czech Republic was successful in selling its Kyoto credits (AAUs) back in 2009–2010. Revenues from sales of over 90 mil. AAUs amounted to appr. 21 bln. CZK (>800 mil. euro) and were distributed through the Kyoto Protocol's Green Investment Scheme (locally called Green Savings Programme) to over 80,000 projects. It supported energy savings and use of local renewable energy sources for heat production at family houses and later also at multi-apartment buildings. The programme ended in autumn 2010 due to exhaustion of financial allocation. It attracted strong interest from residential building owners at the same time. Second, Operational Programmes for the next EU funding period are being set up. Czech Republic did allocate around 14 bln. CZK (>550 mil. euro) via Operational Programme Environment (OPE) in the current programme period to energy efficient renovation of public buildings (schools, hospitals, municipal offices etc.). It has been one of the most successful lines in OPE and whole EU Funds 2007–2013 (Source: [www.buildup.eu](http://www.buildup.eu))

#### 2. MAIN OBJECTIVE

The project is aimed at strengthening capacity of local sector actors (the target audiences are spelled out below) in the field of energy efficiency, including technologies, policies and markets. Consequently, the activities are structured into on-site trainings in the involved countries and a study tour to the Czech Republic as spelled out below.

### **3. EXPECTED OUTPUTS**

#### **OUTPUT 1**

##### **Design and delivery of training program on energy efficiency in buildings**

3 trainings will be organized for targeted groups of building sector practitioners from Armenia, Kazakhstan, and Kyrgyzstan. Similar workshops will be organized in each of the targeted countries as defined below. Each workshop shall involve a combination of lectures, case studies and group work/discussion, tentative duration of each workshop: 3 days. Required number of experts per training: 2-3. Each training program should cover the following subjects:

##### **Day 1: Technological Solutions for Energy Efficient Buildings**

Targeted audience: design and construction companies, state design expertize experts

Topics to be covered:

1. Integrated design of EE buildings
2. Passive house design and construction Green building standards and construction
3. Technological solutions for energy efficient retrofits of multi-apartment residential buildings (thermal modernization), including cost assessment and economic analysis of proposed measures. Institutional and financial scheme of residential building retrofit organization.

##### **Day 2 (part 1): Energy audits and energy monitoring in buildings**

Targeted audience: energy service companies and other organizations involved in building energy management

Topics to be covered:

1. Energy audit methodologies
2. Energy Passport compilation / EE label / EE Certificate
3. Common Equipment and software to conduct energy audits
4. Practical session in one of the pilot or reference building (if applicable).

##### **Day 2 (part 2): Policies and regulations for energy efficient buildings**

Targeted audience: state authorities involved in design and enforcement of EE policies and regulations in building sector

Topics to be covered:

1. Experience of EPBD approximation, standard implementation road map and barriers on example of Czech Republic (provide a report on this topic, approx. 10-20 pages)
2. Transposition of the EPBD directive and respective EN/ISO standards- Czech experience
3. Energy efficient building codes

4. EE passport and labeling system / certification
5. Enforcement of EE building codes, directives and standards
6. Other international best practices on EE building policies and regulations

### **Day 3: Peer-to peer consultations**

Peer to peer consultations around topics covered during days 1 and 2.

***The following facilities will be provided by UNDP and its Country Offices (i.e., not included into price proposal):***

- Office space and facilities;
- Land Transportation;
- Simultaneous translation during the trainings;
- Refreshments for the workshop participants

## **OUTPUT 2**

### **Study Tour to Czech Republic**

- The selected Contractor shall deliver services as detailed below as well as secure overall logistics for the study tour to the Czech Republic (visa support, accommodation, transport inside the Czech Republic in the case of the study tour, etc.).
- The contracted company shall contribute to completing the visa procedures for the participants, first of all, to provide them with invitation letters from relevant Czech institutions.
- Expenses for travel and visa of the participants shall be covered from separate resources (i.e., not included into price proposal).
- UNDP and its Country Offices shall be responsible for selection of the participants for the study tour involved in this project.
- The study tour for a group of representatives from all three participating countries (13 participants) will be organized and should cover the same topics as described above for the workshops to familiarize beneficiaries with experience of the Czech Republic in the area of energy efficiency in buildings.

**Number of days:** one week in Czech Republic (five full working days of targeted activities).

**Activities:** meetings with relevant counterparts, incl. business, municipality representatives, EE buildings site visit, design and engineering companies, public authorities, etc.

The following activities are envisaged to contribute to attainment of overall objective of study tour:

- Selections of best informers, projects and project sites, engagement and preparation of
- presentations by competent practitioners and experts
- visits to key relevant institutions and meetings with relevant stakeholders

- ensuring relevant contacts as well as other relevant information according to participants’ expectations

**Organization of the Study Tour:**

- Logistics of the whole study tour including transportation and hotel arrangements etc.
- Programme preparation and organization: experts to be consulted, visits to selected institutions, social event (e.g. dinner, sightseeing or similar) and other activities
- (informal meetings, workshops, roundtables, discussions etc.).

***The following facilities will be provided by UNDP and its Country Offices (i.e., not included into price proposal):***

- Return flight tickets for the participants of the Study Tour.

**4. DELIVERABLES**

The Contractor will produce the following written outputs:

Output 1: Workshop materials:

- **Report on experience of EPBD approximation**, standard implementation road map and barriers on example of Czech Republic (provide a report on this topic, approx. 10-20 pages), Russian and English
- **Training packages** (design in English, handouts for participants in Russian)
- **Mini-Summary report** on each workshop (max. 5 pages incl. photos, programme, participants list, participants’ feedback, summary), English

Output 2: Study Tour

- **Preliminary report on study tour** (in English overall information, agenda for participants in Russian)
- **Final study tour report** (incl. photos, participant’s feedback), in English

Project closing

- **Final report** including the previous outputs and additional recommendations (compilations of previous outputs and additional recommendation and summary in English)

**5. TIME FRAME OF DELIVERY**

The following instalments shall be done per the following deliverables and only if the below-stated conditions for payment release are satisfied:

Deliverables	Percentage	Timing	Conditions for Payment Release
Training package (training design for all 3 countries), incl. experience of EPBD approximation report	20%	May 31, 2014	Within thirty (30) days from the date of meeting the following conditions: a) UNDP’s written acceptance (i.e.,

Preliminary report on study tour	40%	June 15, 2014	not mere receipt) of the quality of the outputs; and b) Receipt of invoice from the Service Provider.
Final report	40%	October 15, 2014	

The assignment shall be completed in a period of 6 (six) months upon signing of the contract. The start of the assignment is expected to be on the 15 May 2014 and to be completed no later than the 15 October 2014 (submission of final report). The final schedule will be agreed upon at the beginning of contractual assignment.

## 6. CONTENT OF THE PROPOSAL

The following information related to the local on-site trainings must be specified separately and in detail in the proposal:

- Draft program of the events in Astana, Bishkek and Yerevan, selection of experts to deliver trainings (CVs of the lecturing experts attached);
- Time schedule of the meetings and lectures in Czech Republic, please include one social event for the participants (e.g. dinner, sightseeing etc. during study tour);
- Other proposed activities (informal meetings etc.).

The following information related to the study tour event must be specified separately and in detail in the proposal:

- Draft program of the event: selection of experts to consult and of institutions to visit;
- Time schedule of the meetings and lectures, please include one social event for the participants (e.g. dinner, sightseeing etc.);
- Description of the institutions; CVs of the lecturing experts;
- Type of accommodation and other services provided, including type of conference room/s used, refreshments etc.;
- General logistics – what type of transport (public transport, rented mini/bus...);
- Other proposed activities (informal meetings etc.).

The budget estimate should be prepared in USD separately for each activity according to the attached template (Annex V). The budget estimate shall include:

- full board accommodation (including three meals);
- renting meeting space and refreshments (approx. 2 coffee breaks per working day, depending on the program);
- interpretation and translation cost from Czech to Russian;
- transport from/to the airport plus other local transport costs (e.g. public transport);

- all materials prepared for the participants (handouts, information package etc.);
- organization costs (please specify what is included).

## **7. QUALIFICATION CRITERIA**

### Organization:

- Experience with EU requirements and directives in the relevant field;
- Demonstrated experience with cooperation with all stakeholders: NGOs as well as private sector entities, line ministries, police, municipal associations, local governments etc.;
- Experience in designing and delivering consultation services within Commonwealth of Independent states countries;
- Previous experience in organization of the workshops and study visits, previous working experience within the stakeholders from international organisations in Europe & CIS region is preferred;
- Understand the mandate and practices of UNDP and other international organisations;
- Appropriate references will be considered an advantage.

### The staff involved in implementation should meet the following qualification criteria:

- Advanced university degree in the related fields (Energy, Environment Economics or similar).
- Documented expertise on market based energy efficiency tools implementation, preferably on EE and/or environmental labeling projects
- At least 5 years of relevant working experience in international projects particularly in Central or Eastern European countries.
- Communication and drafting, as well as project management skills of the expert.
- Ability to collaborate on capacity development projects involving a diverse range of partners, and in cooperation with various stakeholders;
- Experience in training professionals;
- Excellent analytical, presentation and reporting skills;
- Fluency in English and Russian languages.

## **8. REPORTING**

The Contractor will report directly to the supervisors:

UNDP Armenia: Project Task Leader, Mr. Vahram Jalalyan

UNDP Kazakhstan: Program Analyst, Mr. Rassul Rakhimov

UNDP Kyrgyzstan: Project Manager, Mrs. Elena Rodina

UNDP Bratislava: Ms. Barbora Lateckova, Czech-UNDP, Trust Fund

The Contractor shall ensure quality and timely delivery of the expected results, and will regularly inform the supervisors of the progress as well as any obstacles that might occur. Programmatic and financial

reporting must conform to the requirements specified in the Contract, signed between the contractor and UNDP.

Also the contractor will be responsible for the timely collection of all necessary documents, such as procurement related documents, account invoices, receipts, payroll records and other documents that confirm the legality of expenditures.

In addition, the Contractor should provide to UNDP all photos and other visual materials collected/made during this project. Printed and electronic versions of reports should be delivered to UNDP BRC and UNDP Country Offices. Electronic version of the report should be saved as MS Word. All reports must be typed in ARIAL, size 11, A4.