



## Policy and Legal Advice Centre (PLAC IV)

### Terms of Reference (ToR) for a Short-Term assignment

#### No. 18

<b>Technical assistance requested:</b>	1 (one) Senior Non-Key Expert and 1 (one) Junior Non-Key Expert in the area of Negotiating Ch. 15, Energy – Methodology for calculating financial parameters for implementing energy efficiency measures
<b>Project Title:</b>	Policy and Legal Advice Centre (PLAC IV)
<b>Ref:</b>	NEAR/BEG/2023/EA-RP/0175
<b>Service Contract No:</b>	(CRIS) 2024/453-315
<b>Main beneficiary:</b>	The Ministry of European Integration (MEI)
<b>Direct beneficiaries</b>	Negotiating Group Ch. 15; Ministry of Construction, Transport and Infrastructure
<b>Content of the assignment:</b>	Technical assistance in drafting the Methodology for calculating financial parameters for implementing energy efficiency measures related to Energy Performance of Buildings Directive 2010/31/EU (amended by Directive 2018/844/EU and Regulation 2018/1999/EU), that is, Energy Performance of Buildings Directive 2024/1275/EU
<b>Budget Line/Expert category</b>	1 (one) Non-Key Short-Term Senior Expert and 1 (one) Non-Key Short-Term Junior Expert
<b>Duration of the assignment</b>	30 working days (20 WDs for SNKE, 10 WDs for JNKE), from January 2025 until April 2025

#### 1. Background information concerning the PLAC IV project

The overall objective of the PLAC IV is for the Serbian administration to effectively conduct accession negotiations and successfully manage overall EU integration and pre-accession assistance geared towards EU membership.

The project's purpose is to achieve a high level of effective alignment of national legislation with the Union *acquis* and its implementation.



PLAC IV should achieve 2 results:

- R1: Enhanced compatibility of national legislation with EU legislation and its effective implementation.
- R2: Enhanced capacities of relevant national structures for successful carrying out of accession negotiations

In general, the Project aims to foster the Republic of Serbia's accession negotiations by supporting the effective alignment of national legislation with the Union *acquis* and its implementation and by further building the capacities of involved carriers of the EU integration process in the Republic of Serbia.

Energy efficiency in the building sector is recognised as one of the most challenging and complex aspects of the Union *acquis* when it comes to harmonising national legislation with EU legal requirements and implementing policy measures adopted by EU institutions.

The Government of Serbia submitted the negotiating position for Chapter 15 – Energy (Negotiating Position) to the European Commission (EC) on June 7<sup>th</sup>, 2021. Serbia opened negotiations in Ch. 15 on December 14<sup>th</sup>, 2021, as part of Cluster 4 – Green Agenda and Sustainable Connectivity.

To progress in negotiations in Cluster 4, Serbia needs to make significant efforts to align its legislation further with the energy efficiency *acquis* in Chapter 15.

Following the main conclusions from the meeting of the Sub-Committee on Transport, Energy, Environment, Climate Change and Regional Development of the Stabilization and Association Agreement, held on December 9<sup>th</sup>, 2021 (Operational conclusions, p.1), the EC invited Serbia to announce whether there are any concrete actions or plans, such as a National Energy and Climate Plan and the Long-Term Building Renovation Strategy, that IPA can contribute to.

To implement Article 2a of the EPBD (recast), Serbia adopted the Long-Term Renovation Strategy for Encouraging Investments in Renovation of the National Building Stock of the Republic of Serbia by 2050 (*Official Herald of the RS*, No. 27/2022-05) in February 2022 (hereinafter referred to as the Building Renovation Strategy).

The Building Renovation Strategy indicates the need for Serbia to adopt a new methodology for calculating the energy performance of buildings, to set stricter levels of energy efficiency in buildings, i.e. new minimum energy performance requirements, to define nearly zero energy building level (NZEB), increase percentage of use of renewable energy sources (RES), to update existing system of certification of energy performance of buildings, to fortify a system of accredited expert who are responsible for EPC, and introduce a system of independent professional control and establishing penal provisions and sanctioning improper certification of the energy performance of buildings.

The Serbia Progress Report for 2023 of the European Commission states that "Serbia continued to progress in aligning with the EU *acquis* on energy efficiency by adopting 22 acts of implementing legislation under the new Law on Energy Efficiency and Rational Use of Energy, these focused on energy savings, eco-design and energy labelling frameworks." (...) "Nevertheless, only limited progress was made in aligning with the Energy Performance of Buildings Directive - Directive (EU) 2018/844 and setting up an implementing legislation framework for renovating the building stock. Serbia is missing a national calculation methodology for energy performance of buildings, nearly zero-energy buildings standards for all new public and commercial buildings, and a legislative framework for the increased use of



renewable energy, such as an electric vehicle charging infrastructure." (Serbia 2023 Progress Report, p. 132). The Progress Report 2024 reiterated the need for further alignment with the Energy Performance of Buildings Directive. (Serbia 2024 Progress Report, p. 86).

In conclusions from the meeting of the Sub-Committee on Transport, Energy, Environment, Climate Change and Regional Development of the Stabilization and Association Agreement, held on December 7th and 8th, 2023 (Operational conclusions, p. 5), the Ministry of Construction, Transport and Infrastructure emphasised the obligation to adopt a new methodology for calculating the energy resources of buildings, because the existing methodology is only partially aligned with the EPBD Directive.

The National Programme for Adoption of *Acquis* 2024-2027 (NPAA) envisages amending the Rulebook on the energy efficiency of buildings and the Rulebook on the conditions, content, and manner of issuing certificates on the energy properties of buildings by the end of IVQ 2025, and consequently amending the Law on Planning and Construction, as steps to fully transpose the EPBD (recast).

Through the PLAC III technical support programme (EuropeAid/139295/DH/SER/RS; (CRIS) 2018/404-529), technical assistance for drafting amendments to the **Law on Planning and Construction** and amendments to the **Rulebook on the energy efficiency of buildings** and **Rulebook on the conditions, content and manner of issuing certificates on the energy properties of buildings** has been provided, as well as in the drafting of a new bylaw - the **Rulebook on the manner of conducting an energy audit for the purpose of certification of energy performance of buildings with Annex to the Rulebook** – a detailed methodology defining steps and technical procedures of conducting an energy audit for the purpose of certification of energy performance of buildings.

Through the development of those bylaws, and especially for successful and complete implementation of the measures from the draft of the Rulebook on the manner of conducting an energy audit for certification of energy performance of buildings and its Annexes, it was concluded that it would be necessary to develop methodology for financial parameters calculations for energy efficiency measures implementation (in compliance with EPBD 2010/31/EU (recast) and its Article 5 and its Annex III.

Therefore, expert support is needed to assist the Ministry of Construction, Transport and Infrastructure (MoCTI) in drafting a Methodology for calculating financial parameters for energy efficiency measures implementation related to the Energy Performance of Buildings Directive 2010/31/EU (amended by Directive 2018/844/EU and Regulation 2018/1999/EU), that is, Energy Performance of Buildings Directive 2024/1275/EU.

There is no ongoing project assistance for the activities covered by this ToR.

## 2. Description of the assignment

### a. Specific objectives

The specific objective of this assignment is to assist the Ministry of Construction, Transport and Infrastructure (MoCTI) and the Negotiating Group Ch. 15 (NG 15) to enhance the effective implementation and enforcement of Directive (EU) 2010/31/EU of May 19th 2010 on the energy performance of buildings as amended by Directive (EU) 2018/844 and Regulation (EU) 2018/1999 (recast) and specific articles of Directive (EU) 2024/1275/EU of April 24<sup>th</sup> 2024 on the energy performance of buildings (recast), by defining all necessary steps and method for calculating financial parameters for energy efficiency measures implementation for further



energy savings, with final goal toward zero emission.

Within the scope of this objective, the selected expert shall assist the MCTI in developing a Methodology for calculating financial parameters for implementing energy efficiency measures.

In Serbia's national legal system, there is the Rulebook on the conditions, content, and manner of issuing certificates on the energy properties of buildings ("Official Herald of RS", No. 69/2012, 44/2018—other law and 111/2022), which defines the obligation to recommend energy efficiency measures in Energy Performance Certificates (EPC) but without any specific details.

This recommendation system is not unified, and it is not possible to provide control of it. Also, there is no obligation to provide information about additional energy savings through measure implementation, cost, or payback period.

This new methodology must revise the existing obligations related to energy efficiency measures recommendations in EPC and define in detail:

- amount of energy savings for individual measures and packages of measures,
- cost of implementing the measure/package of measures,
- payback period for each measure and packages of measures,
- sequence of implementing the measures (considering costs and effectiveness of energy savings),
- alternative options for implementing the measures and packages of measures,
- other issues.

The Methodology will cover:

- defining all necessary data necessary for calculation;
- procedures and algorithm for calculation;  
form with the measures recommendation (amount of energy savings, cost of implementing, payback period, sequence of implementation, alternative and adopted measures recommendation);
- other issues.

With a clearly defined methodology for calculating financial parameters for implementing energy efficiency measures, it would be possible and much easier to recommend measures for further energy savings in a cost-optimal range with a rational payment period during the construction of new buildings and energy renovation for existing buildings.

**This new, more precise system of recommendations for implementing energy efficiency measures will provide efficient procedures for investing in energy renovation and constructing efficient buildings, leading the Republic of Serbia towards zero emissions.**

Before drafting the Methodology, it is necessary to analyse in detail national regulations related to cost-optimal recommendations in EPCs for the construction of new buildings and energy renovation of existing buildings, especially in renovation passports, and to provide all possible options for the best implementation of the Methodology.

Also, for a complete system of assessment and recommendations, a technical guide for building energy bill modelling (used energy in heating bills, electricity bills..., etc.) is necessary to monitor the implementation of energy efficiency measures.

The technical guide will cover:

- defining all necessary data for energy bills modelling;



- procedures for data (energy bills) collecting;
- data (energy bills) processing and modelling;
- forms with the results of energy bills modelling;
- guide and form for energy savings monitoring;
- other issues.

MCTI shall determine the specific scope of the Methodology for calculating financial parameters for energy efficiency measures implementation in coordination with the experts.

A workshop will be held to present the activity's results to the representatives of the MCTI and NG 15. The experts will consider inputs from the representatives' presentations in their final outputs.

#### **b. Requested services**

**The Senior NKE in the area of energy efficiency legislation is expected to provide the following services:**

- a) Assist MCTI in drafting analysis regarding national regulation related to cost-optimal recommendations in EPCs for the construction of new buildings and energy renovation of existing buildings, especially in renovation passports (in collaboration with JNKE);
- b) Assist the MCTI in drafting the Methodology for calculating financial parameters for energy efficiency measures implementation (in collaboration with JNKE);
- c) Prepare and hold a workshop to present the outputs of the assignment (in collaboration with JNKE).

**The Junior NKE in the area of energy efficiency legislation is expected to provide the following services:**

- a) Assist the MCTI in drafting the Technical guide for modelling energy bills to monitor the energy efficiency measures implementation (in collaboration with SNKE);
- b) Prepare and hold a workshop to present the outputs of the assignment (in collaboration with SNKE).

#### **c. Outputs**

The outputs delivered by the Senior NKE shall be as follows:

- Analysis regarding national regulation related to cost-optimal recommendations in EPCs, for construction of new buildings and energy renovation of existing buildings, especially in renovation passports drafted;
- Methodology for calculating financial parameters for implementing energy efficiency measures drafted;
- Workshop held.

The outputs delivered by the Junior NKE shall be as follows:

- Technical guide for modelling of building energy bills to monitor the energy efficiency measures implementation;
- Workshop held.

#### **d. Reporting**

The NKEs shall provide the following reports by using the templates of the Project:



- A brief Mission Report with a description of activities and outputs provided at the end of each month, in which tasks under this assignment have been carried out,
- Final Mission Report, no later than one week after completing tasks under this assignment. This report will include a description of all activities and outputs provided by the NKE in the context of this assignment.

#### Submission of reports:

- All reports prepared with the relevant quality shall be submitted to the Project Team Leader for review, comments, and final approval. The reports shall be signed by the NKE and the Team Leader responsible for endorsing them.
- The reports and all prepared documents shall be submitted to the Project Team Leader in hard copy and electronic format.

#### **e. Specifics**

The Senior NKE and the Junior NKE shall collaborate with the Project Technical Assistance Team on preparing and drafting the Methodology for calculating financial parameters for implementing energy efficiency measures. The NKE's activities and outputs mentioned above may be adjusted by the Team Leader at any stage in the project's implementation, depending on the evolving needs of the Project and main beneficiary.

The Senior NKE and Junior NKE shall ensure that the Methodology for calculating financial parameters for implementing energy efficiency measures is aligned with the EPBD 2010/31/EU (amended by Directive 2018/844/EU and Regulation 2018/1999/EU), that is, EPBD 2024/1275/EU. The Senior NKE and the Junior NKE shall closely coordinate the activities with the Ministry of Construction, Transport and Infrastructure and others, as relevant, to ensure that aspects related to implications of EU integration for Serbia are incorporated into all activities carried out by the Project.





### 3. Expert's input

Total working days	30 working days (WDs) in total have been planned for this assignment (20 WDs for SNKE, 10 WDs for JNKE). An additional number of WDs may be allocated for this ToR, should the needs of the main beneficiary require an extension for the activity areas mentioned in this ToR.
Period of the assignment	January 2025 until April 2025.
Starting day	The work is expected to be performed from January 2025 onwards. However, the exact starting date will be agreed upon later.
Location/place of assignment	The base of operation will be in Belgrade, Serbia, and the Project will provide office facilities.
Working language	English

### 4. Expert's profile

#### Senior Non-Key Expert

<b>Qualification and skills (25 points)</b>	<ul style="list-style-type: none"> <li>• Relevant university degree, preferably in fields related to architecture, HVAC engineering, electrical engineering or similar relevant to the assignment;</li> <li>• Computer literacy;</li> <li>• Proficiency in report drafting;</li> <li>• Excellent communication and analytical skills;</li> <li>• Proficiency in the English language;</li> <li>• Independence and freedom from conflicts of interest in the undertaken responsibilities.</li> </ul>
<b>General professional experience (25 points)</b>	<ul style="list-style-type: none"> <li>• Minimum 8 (eight) years of relevant professional experience;</li> <li>• At least 5 (five) years of experience related to the Union acquis, gained in an EU Member State, a candidate or a potential candidate country.</li> </ul>
<b>Specific professional experience (50 points)</b>	<ul style="list-style-type: none"> <li>• At least 3 (three) preferably 5 (five) years of postgraduate professional experience in drafting and/or implementing legislation in relation to Union acquis in the area of energy performance of buildings;</li> <li>• Knowledge of the Serbian legal system will be an advantage.</li> </ul>



### Junior Non-Key Expert

<p><b>Qualification and skills (25 points)</b></p>	<ul style="list-style-type: none"> <li>• Relevant university degree, preferably in fields related to architecture, HVAC engineering, electrical engineering or similar relevant to the assignment;</li> <li>• Computer literacy;</li> <li>• Proficiency in report drafting;</li> <li>• Excellent communication and analytical skills;</li> <li>• Proficiency in the English language;</li> <li>• Independence and freedom from conflicts of interest in the undertaken responsibilities.</li> </ul>
<p><b>General professional experience (25 points)</b></p>	<ul style="list-style-type: none"> <li>• Minimum 5 (five) years of relevant professional experience;</li> <li>• At least 1 (one) year of experience related to the Union <i>acquis</i>, gained in an EU Member State, a candidate or a potential candidate country.</li> </ul>
<p><b>Specific professional experience (50 points)</b></p>	<ul style="list-style-type: none"> <li>• At least 1 (one), preferably 3 (three) years of postgraduate professional experience in drafting and/or implementing legislation in relation to Union <i>acquis</i> in the area of energy performance of buildings;</li> <li>• Knowledge of the Serbian legal system will be an advantage.</li> </ul>

## 5. Applications

Applications (EU format CV and application letter, both in English) need to be submitted by e-mail to [domi@ibf.be](mailto:domi@ibf.be) with a copy to [bortolameazzi@ibf.be](mailto:bortolameazzi@ibf.be) than 17:00 hrs, 10 January 2025, titled: "Application for the position – Senior Non-Key Expert / Junior Non-Key Expert for drafting the Methodology for calculating financial parameters for implementing energy efficiency measures".

References must be available on request. Only short-listed candidates will be contacted.

The Project is an equal opportunity employer that encourages applications from women and minorities. All applications will be considered strictly confidential.

The advertised post is not available to civil servants or other public administration officials in Serbia, the beneficiary country.

For more information, please contact the Project Director at IBF: [bortolameazzi@ibf.be](mailto:bortolameazzi@ibf.be).