

Terms of reference (ToR) for the procurement of services below the EU threshold

CONFIDENTIAL

Development of Training Curriculum and Delivery of Learning Activities for Accreditation Bodies under the Single Market Academy (SMA)

**Project number/
cost centre:
G-012571-002 /
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**Tender number
10047257**

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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference
LMS	Learning Management System
BMZ	Federal Ministry for Economic Cooperation and Development
EU	European Union
WB6	Western Balkans 6
GP	EU Growth Plan for the Western Balkans
SMA	Single Market Academy
QI	Quality Infrastructure
ACAA	Agreement on Conformity Assessment and Acceptance of Industrial Products
CEN	European Committee for Standardization
CENELEC	European Committee for Electrotechnical Standardization
EA	European co-operation for Accreditation
EURAMET	Association of the National Metrology Institutes in Europe
WELMEC	European Cooperation in Legal Metrology
LMS	Learning Management System
NAB	National Accreditation Body
WP	Work Package

1. Context

The Multi-Donor Action “EU4Trade: Accelerating Regional Economic Integration and EU Single Market Access for the Western Balkans” is jointly co-financed by the European Union and the Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by GIZ as part of the BMZ project “RegioTrade – Enhancing Regional Economic Integration in the Western Balkans through Trade”.

Strengthening regional economic integration harbours significant economic potential for the Western Balkan region and is a critical prerequisite for the region's accession to the European Union. The EU Growth Plan for the Western Balkans (GP) envisions closer integration with the Single Market, which necessitates aligning NQI with EU requirements. This alignment requires addressing existing gaps between national systems and EU regulatory frameworks, ensuring that Western Balkan countries' QI can fully support compliance with Single Market rules.

To support this integration, the Single Market Academy (SMA) has been conceived as a flagship initiative under the umbrella of the project EU4Trade: Accelerating Regional Economic Integration and EU Single Market Access for the Western Balkans. The Single Market Academy (SMA) will provide tailored capacity-building support to the Western Balkans, focusing on strengthening the Quality Infrastructure (QI) in alignment with EU requirements. The project responds to the “Gap Assessment Study” findings conducted by GIZ, which identifies critical training gaps across key QI pillars: metrology, standardization, accreditation, conformity assessment, and market surveillance.

The primary aim is to build the capacity of these institutions to fully implement and enforce EU regulatory requirements. This alignment will contribute to the region's integration into the EU Single Market, enhancing regional trade opportunities and facilitate the conclusion of Agreements on Conformity Assessment and Acceptance of Industrial Products (ACAAs).

An important component of the SMA will be to explore and engage in strategic partnerships with leading European institutions such as the European Committee for Standardization (CEN), the European Committee for Electrotechnical Standardization (CENELEC), the European co-operation for Accreditation (EA), the Association of the National Metrology Institutes in Europe (EURAMET), and the European Cooperation in Legal Metrology (WELMEC). These partnerships will enable SMA to leverage European expertise, access essential resources, and apply proven best practices. By working closely with these established bodies, the SMA will be able to deliver high-quality training and competence recognition across the Western Balkans.

Single Market Academy is designed in a way to provide flexible and scalable training approach to address the diverse needs across the WB6 region. In that regard, the SMA comprises blended training model, combining in person, hybrid and online learning formats, delivered through a Learning Management System. This approach will provide the necessary flexibility to accommodate varying regional needs and available resources.

As the accreditation systems in the Western Balkans continue to evolve, National Accreditation Bodies (NABs) are faced with increasing technical, organizational, and regulatory requirements arising from European and international accreditation frameworks, digitalization processes, emerging conformity assessment schemes, and the growing need for regional cooperation and harmonization.

The regional needs assessment and consultations conducted with National Accreditation Bodies from the Western Balkans identified a number of common capacity development priorities, including the implementation of ISO/IEC 17011 requirements, application of conformity assessment standards, governance and strategic management of accreditation bodies, implementation of EU legislation referencing accreditation, digitalization of accreditation processes, assessor competence management, and emerging accreditation schemes.

In response to these needs, a comprehensive training curriculum for accreditation bodies is to be developed and delivered through the Single Market Academy, with the objective of strengthening institutional capacities, promoting harmonized practices, facilitating peer learning, and supporting further alignment with European and international accreditation requirements.

The training curriculum for accreditation bodies aims to provide participants with theoretical, practical knowledge, and competencies necessary for the effective implementation of accreditation procedures, strengthening institutional governance and performance, supporting digital transformation initiatives, and enhancing the role of accreditation in the implementation of EU legislation and conformity assessment frameworks.

2. Tasks to be performed by the contractor

The overall objective of this assignment is to develop a comprehensive training curriculum for National Accreditation Bodies from WB6 under the framework of the Single Market Academy, and accordingly to design and deliver the corresponding learning activities in accordance with the approved curriculum.

The training curriculum should be based on implementation of European and international accreditation requirements, and best practices and practical experiences from National Accreditation Bodies, while ensuring relevance to the specific needs and challenges of accreditation systems in WB6 economies.

The training curriculum should contribute to:

- Enhancing knowledge and technical competencies of the staff involved in the work of Accreditation Bodies, in line with the requirements of the European accreditation system and the EU Single Market legislative framework.
- Improving governance, strategic planning, risk-based management practices and optimization of processes within accreditation bodies
- Harmonization and consistency of accreditation practices across the region
- Facilitating peer learning and exchange of good practices among National Accreditation Bodies

The contractor is responsible for providing the services described below. The services are organized into three Work Packages encompassing the full process of the development, planning, implementation, and evaluation of the training curriculum for accreditation bodies.

WORK PACKAGE 1 – DEVELOPMENT OF A MODULAR TRAINING CURRICULUM FOR ACCREDITATION BODIES

WP 1 – Task 1 – Revision of existing materials and inputs

The contractor shall revise all relevant existing materials, background documents provided by the project team and partner institutions. The aim of this revision is to ensure consistency, relevance, and alignment with the objectives of the Single Market Academy, as well as with requirements from European legislation and best practices in accreditation and conformity assessment.

Based on this revision, the contractor shall develop modular training curriculum and accordingly the training materials for capacity building of National Accreditation Bodies.

WP 1 – Task 2 - Develop a training curriculum for accreditation bodies

Based on the outcome from the revision of the existing materials, the contractor shall develop a modular training curriculum for accreditation bodies covering the priority topics identified through the regional needs assessment.

Training curriculum for accreditation bodies shall include:

- **Detailed description of the** topics and subtopics covered by the respective module
- **Learning objectives and learning outcomes** – for each of the modules, the contractor should define the aim and competencies which will be developed, as well as skills and knowledge that participants will be capable to demonstrate after completing the respective learning activity(ies)
- **Recommended format of delivery and duration** - For each of the modules the contractor should propose:
 - the most suitable learning activity e.g. training, study visit, workshop, webinar, coaching or mentoring sessions, information session, learning forum, Train the trainer programme etc.
 - the most appropriate modality for delivering of the respective learning activity, e.g physical event, remote learning, blended etc.
 - the expected length of the respective learning activity (days, hours....), ensuring appropriate workload planning
- **Target audience and level** - specific group(s) of participants for whom the learning activity is intended (such as managers, technical staff, assessors, or policymakers), as well as the needed competence and experience (basic, intermediate, or advanced) to ensure that the content, methodology, and learning outcomes are tailored to the respective group of participants.
- **Materials and reference documents** – the contractor shall develop all resources which will be used prior, during and after the development activities, such as presentations, guidelines, recommended reading materials etc. Where applicable, the activities within respective training modules shall contain interactive elements, such as case studies, group work, simulations, exercises etc, which will be used to apply theoretical knowledge in practice. The contractors shall also develop materials and tools which will be used for evaluation of the gained knowledge of participants, e.g. tests, quizzes, assignments or other, as well as to collect feedback on the relevance, quality, effectiveness, and practical applicability of the training content. The results from these evaluations will be used for revision and continuous improvement of the training curriculum and planning of the future activities.

The indicative training modules are presented in Annex I of this ToR. The training modules and listed topics presented in the Annex I serve as a guiding framework for the development of the training curriculum and should not be considered exhaustive. The training modules reflect the priority areas identified through consultations with NABs and previously conducted needs assessments. The contractor is encouraged to propose additional topics, or subtopics

that are considered relevant for strengthening capacities and supporting alignment of NABs with the requirements of European accreditation. All additionally proposed topics, or subtopics should demonstrate added value to the overall training curriculum, and complement the objectives of the Single Market Academy. The final structure and content of the training curriculum shall be approved by with the project team and NABs during its development phase.

WORK PACKAGE 2 – DEVELOPING MATERIALS AND SUPPORTING LEARNING RESOURCES

The contractor is responsible for developing all materials and supporting learning resources required for the effective delivery of the respective learning activities.

The materials shall be prepared based on the approved modules and topics of the training curriculum and tailored to the specific delivery modality of each learning activity (e.g. in-person training, webinar, online learning, study visit, peer-learning activity, or blended learning format).

The materials can encompass but are not limited to presentations (PowerPoint or equivalent), guidelines for participants, practical exercises, case studies, group work assignments, as well as templates, checklists, and other operational tools, self-assessment tests and reflection exercises, pre-training reading and background materials etc.

The contractor should also develop supporting learning resources that complement the learning activity and facilitate continued learning. Such resources may include guidance documents, reference to relevant standards, reading lists and recommended resources, Frequently Asked Questions (FAQs), good practice examples and lessons learned.

All materials shall be developed to be suitable for the two delivery formats: in-person events and online learning through the e-learning platform.

Materials intended for online delivery shall be developed in a format suitable for integration into a Learning Management System and structured in a way that facilitates their conversion into self-paced or other online learning formats.

The materials for both formats shall be coherent, shall complement the learning content and be designed in a way to facilitate active participation, knowledge retention, as well as future reuse and updating within the Single Market Academy framework.

The materials should be developed in English language.

WORK PACKAGE 3 – DELIVERY AND EVALUATION OF LEARNING ACTIVITIES

Delivery

The contractor is responsible for delivering the learning activities developed under the previous work package. The delivery of each learning activity shall be based on the approved training curriculum and in line with the plan and calendar of activities within the Single Market Academy.

The implementation of this work package shall follow different learning modalities, including physical training, virtual sessions, webinars, peer learning activities, study visits, or other, depending on the specific module(s) and the most effective format for transfer of knowledge and application.

The contractor should ensure that all activities are delivered in a way to promote high-quality, interactive, peer-to-peer and practice-oriented learning process aimed at achieving respective learning objectives.

Where relevant, the contractor shall also facilitate organization of study visits and/or practical learning exchanges with institutions or organizations possessing advanced experience in relevant topics, with the aim of demonstrating real-life implementation of processes and procedures in accreditation.

The contractor is also responsible for the preparation of agendas, coordination with project team and experts who will be responsible for delivering the learning activities. The contractor shall ensure close coordination with the project team throughout the process, including planning, preparation, and confirmation of experts for delivering the learning activities.

GIZ is responsible for the logistical organization of learning activities (venue, travel of participants) and ensuring appropriate delivery platforms for virtual components.

Feedback and Evaluation

The modules and respective learning activities within the training curriculum will remain dynamic and open to revisions and improvements.

After each activity, feedback from participants will be collected and accordingly evaluated, to assess its effectiveness. In addition, the participants will be assessed to determine the gained knowledge and the extent to which the training objectives have been achieved.

Based on the results from evaluations, findings, and feedback collected from participants during the activities, the contractor shall summarize the key findings and provide recommendations for further improvement of the training curriculum, as well as revise the existing materials and their content.

WP 3 – Task 1 – Planning of the learning activities

This task includes:

- **Preparation of plan and calendar for delivery of the activities.** In coordination with the project team, the contractor shall develop comprehensive plan for the delivering all the activities, covering the overall approach, sequencing of activities, formats (e.g. physical, online, blended, etc.), roles and responsibilities, as well as a detailed training calendar specifying timing and duration of training activities. This will ensure the effective delivery and availability of participants for respective learning activities.

Throughout the implementation period, the plan and calendar of activities will be periodically revised, to reflect changes in project priorities, availability of participants, and other relevant circumstances that can influence the delivery of the activities.

- **Selection of experts who will be responsible for delivering learning activities.** The contractor is responsible for proposing a minimum of three qualified experts from the pool of proposed experts. The experts should be capable of delivering respective activities, ensuring they possess relevant technical expertise and practical experience in the subject areas. The final selection and approval of the experts shall remain subject to confirmation by the project team.

WP 3 – Task 2 – Delivery of the learning activities

This task includes, but is not limited to:

- **Delivery of training activities** – in person trainings, remote or trainings in hybrid format, workshops, webinars and other capacity-building or knowledge-sharing events. The contractor is responsible for delivering, facilitation and/ or moderation of up to 20 (twenty) training activities, of which up to 10 (ten) may be delivered online, depending on the agreed training plan, target audience, and operational needs.
- **Delivery of study visits and other peer learning activities** -The contractor is responsible for proposing, identification and coordination with host institutions about the organization of relevant study visits or other peer learning activities

WP 3 - Task 3 – Evaluation of learning activities

This task includes:

- Assessment of the acquired knowledge of participants (through tests, quizzes, assignments etc.)
- Evaluation feedback from participants after each training activity (relevance, quality, effectiveness, and practical applicability of the training content).

The contractor is responsible

- Preparing questionnaires or other tools for collecting feedback from participants
- Preparing tests, quizzes, or other suitable tools for assessment of learning outcomes and acquired knowledge
- Collection and analysis of participant feedback after each training activity
- Assessment of effectiveness of the training activities and learning outcomes
- Preparation of report with recommendations for improvement of the training curriculum and respective training modules, as well as future planning of the training activities.

WP 3 - Task 4 – Revision of the training curriculum for Accreditation Bodies

Based on the results from evaluations, findings, and feedback collected from participants during the activities, and recommendations for further improvement of the training curriculum, the contractor in coordination with the project team will revise the training curriculum in order to ensure continuous improvement of the training modules, content, and delivery formats. Revision of the training curriculum should be based on the Plan–Do–Check–Act model throughout the implementation of the assignment.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
Kick off meeting and periodical coordination meetings with project team	From commencement date to the end of the contract: Up to 10 days, homebased, expert(s)
WP 1 - Development of a modular training curriculum for Accreditation Bodies	
Task 1- Review of available document and providing recommendations	From commencement date to the end of the contract: Up to 15 days, homebased, expert(s)

Task 2- Training Curriculum with Modules submitted and approved	From commencement date to the end of the contract: Up to 35 days, homebased, expert(s)
WP2 - Developing materials and supporting learning resources	
Developed learning materials and other resources	From commencement date to the end of the contract: Up to 90 days, homebased, expert(s)
WP3 - Delivery and evaluation of learning activities	
Task 1- Planning of learning activities	From commencement date to the end of the contract: Up to 5 days, homebased, expert(s)
Task 2 – Delivery of learning activities	From commencement date to the end of the contract: Up to 50 days, homebased and in WB countries, expert(s)
Task 3 – Evaluation of learning activities	From commencement date to the end of the contract: Up to 15 days, homebased and in WB countries, expert(s)
Task 4 – Revision of training curriculum and learning materials	From commencement date to the end of the contract: Up to 50 days, homebased and in WB countries, expert

Period of assignment: from 1 November 2026 until 31 December 2028.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

Expert pool 1 with minimum 2, maximum 3 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool 1

- Lead support, and ensure coherence for the realization of the tasks specified under the work packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Overall coordination and technical management of the assignment
- Development, structuring, and refinement of training curriculum and modules
- Analysis and integration of inputs from consultations, workshops, and training evaluations
- Continuous improvement of training content, methodologies, and delivery formats
- Quality assurance of all learning materials and deliverables
- Ensuring consistency with international accreditation frameworks and the objectives of the Single Market Academy
- Regular reporting in accordance with deadlines

Qualifications of the Expert pool 1

- Education/training (2.6.1): all experts with university qualification (German 'Diplom'/Master) in International Development, Education Studies, Management, Business Administration, Engineering or other *relevant to the assignment*
- Language (2.6.2): all experts with C1-level language proficiency in English
- General professional experience (2.6.3): 3 experts with 10 years of professional experience in accreditation systems, conformity assessment, or quality infrastructure frameworks
- Specific professional experience (2.6.4): 2 experts with 10 years of professional experience in processes and procedures related to international accreditation requirements, including ISO/IEC 17011 and related conformity assessment standards, 2 experts with 5 years of experience in design and delivery of training programmes for accreditation bodies, capacity-building activities, or curriculum development
- Regional experience (2.6.5): 2 experts with 3 years of experience within projects related to Quality Infrastructure for Western Balkan, Eastern Partnership countries or countries in a process of EU accession
- Development cooperation (DC) experience (2.6.6): 2 experts with 5 years of experience in DC in Quality Infrastructure institutional development

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

Expert pool 2 with minimum 6, maximum 12 members

The short-term experts will be recruited during the contract period on the basis of the qualification listed below.

Tasks of the short-term expert pool 2

- Support Expert pool 1 in realization of the tasks specified under the work packages
- Development, structuring, and refinement of the learning materials from the training curriculum
- Quality assurance of all training materials and deliverables
- Delivery of training activities
- Ensuring consistency with international accreditation frameworks and the objectives of the Single Market Academy
- Regular reporting in accordance with deadlines

Qualifications of the Expert pool 2

- Education/training (2.7.1): all experts with university qualification (German 'Diplom'/Master) in International Development, Education Studies, Management, Business Administration, Engineering or other relevant to the assignment
- Language (2.7.2): all experts with C1-level language proficiency in English
- General professional experience (2.7.3): all experts with 7 years of professional experience in accreditation systems, conformity assessment, or quality infrastructure frameworks,
- Specific professional experience (2.7.4): all experts with 5 years of professional experience in delivery of training programmes in the field of accreditation, capacity-building activities related to international accreditation requirements, including ISO/IEC 17011 and related conformity assessment standards,
- Regional experience (2.7.5): 1 year of experience in projects for Western Balkan, Eastern Partnership countries or countries in a process of EU accession

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

The maximum net contract value for the tendered services is EUR 216,000.

We reserve the right to exclude bids whose bid price or full fee rates exceed this maximum amount from further evaluation. In the event of a contract supplement or amendment, we reserve the right to ensure that the total contract value does not exceed EUR 216,000 net.

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2026 \(GERMAN ONLY\)](#)).

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional Accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO₂ emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a . GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert pool	Total	Comments
Designation of expert pool 1	Up to 3	80	80	WP1, WP2, WP3
Designation of expert pool 2	Up to 12	190	190	WP2, WP3
Travel expenses	Quantity	Number per expert pools	Total	Comments
Fixed travel budget	1	14.800	14.800	A budget is earmarked for travel to the following countries: WB6 (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia or Serbia) .

				A fixed budget of EUR 14800 is earmarked for settling travel expenses against evidence. You can find further information on the travel expense budget in the 'Price schedule' document. Please use the 'Explanations' column in the price schedule to break down the individual items. Settlement is possible only until the budget is depleted.
CO₂ compensation for air travel	12	100	1200	A fixed budget of EUR 1200 is earmarked for settling carbon offsets against evidence. Calculated on basis of 12 (twelve) round trip flights
Other costs	Number	Price	Total	Comments
Flexible remuneration	1	17500	17500	A budget of EUR 17500 is foreseen for flexible remuneration. Please incorporate this budget into the price schedule. Use of the flexible remuneration item requires prior written approval from GIZ.

6. Inputs of GIZ or other actors

GIZ is expected to make the following available:

- All the necessary materials and information needed for quality and timely realization of tasks
- Support and instructions to contractor for development of the learning content for digital formats referring to Learning Management System in use
- Logistics for workshops, trainings, study visit and other in person events.

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed

person held in the reference project and for how long. The CVs can also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

8. Annex I

Draft STRUCTURE OF THE TRAINING CURRICULA FOR ACCREDITATION

Overall objective of the training curricula for accreditation: To develop the professional, technical, and managerial competencies of officers in accreditation bodies, ensuring they can perform accreditation assessments effectively, manage change, and maintain compliance with ISO/IEC 17011 and international best practices.

MODULE 1- INTRODUCTORY MODULE FOR ACCREDITATION & CONFORMITY ASSESSMENT

Learning Objectives:

To strengthen understanding of the role of accreditation within a Quality Infrastructure (QI) system by explaining how accreditation underpins reliable and internationally recognised conformity assessment; to map the national conformity assessment ecosystem and identify the roles of its key stakeholders; understand the mandate and responsibilities of a National Accreditation Body (NAB), the principles and value of international recognition arrangements (ILAC/IAF MLA) and relevance of accreditation for enhancing national competitiveness and supporting progress toward EU integration.

Proposal for Topics:

- Accreditation in QI System – interaction with other QI pillars,
- Principles of accreditation – independence, competence, impartiality, transparency
- Principles for International recognition and accreditation frameworks (ILAC/IAF/EA structures)
- Types of CABs and Conformity assessment standards (ISO/IEC 17025, ISO/IEC 17020, ISO/IEC 17021, ISO/IEC 17065, ISO/IEC 17024)
- Regulatory vs. voluntary schemes
- Foundations of Accreditation in Single Market – relevant Regulations from NLF, accreditation as a policy tool in the EU Single Market
- Relationship between EU directives/regulations and accreditation requirements, EU Legislation and Accreditation-Related Schemes (EA-INF/05)
- Role of Accreditation in Designating and Notifying Conformity Assessment Bodies - designation under regulatory and technical requirements
- Harmonized standards and designation/notification of conformity assessment bodies
- Process and role of accreditation in concluding ACAAs

MODULE 2 - Governance, Strategic Planning, Organizational development and Risk-Based Management for Accreditation Bodies

Learning objectives:

To equip participants with the knowledge and tools required to effectively govern, lead, and strategically position a National Accreditation Body (NAB) in alignment with international best practices and EU Single Market expectations; To understand and apply sound governance models, including the role of advisory, technical committees and other relevant structures; To develop comprehensive strategic plans strengthen leadership capabilities needed to drive continuous improvement in accreditation operations and services, aligning the service portfolio and manage organisational changes in line with EU Single Market priorities.

Proposal for Topics:

- Governance models, principles and good practices for Accreditation Bodies (Advisory committees, Technical Committees, oversight structures)
- Develop strategy aligned with national priorities and EU Single Market integration
- Strategic Planning for ABs - mission, vision, development of KPIs aligned with ISO/IEC 17011, performance measurement
- Leadership competences – models and principles for continuous improvement of accreditation operations and services
- Managing changes within AB – needs assessments for sectors, organizational changes, designing organizational structures of Abs fit to purpose, developing new accreditation schemes, implementing and /or transition to new standards
- Process optimization and efficiency improvement, monitoring efficiency and effectiveness
- Risk Management System - Risk identification for assessments, decision-making, impartiality
- Aligning AB portfolio with EU Single Market priorities
- Finances and Business models – sustainable fee structures and budget, financial planning and sustainability of accreditation services (including cost -recovery principles)
- Digital transformation, data driven improvements in Abs, data protection and cybersecurity
- Artificial intelligence in function of ABs – ensuring transparency, traceability and accountability in IT and AI supported processes

MODULE 3 – Requirements for Accreditation Bodies, Conformity Assessment Standards and Schemes

Learning objectives:

To enhance the technical and regulatory competencies of accreditation body staff and assessors in applying ISO/IEC 17011 requirements, understanding and implementing key conformity assessment standards and assessment practices, to acquire knowledge and understanding of developing accreditation schemes in emerging areas

Proposals for topics:

ISO/IEC 17011 – Requirements for Accreditation Bodies

- Structure, scope and key principles of ISO/IEC 17011
- Competence management of accreditation body personnel, including competence matrices and assessor files
- Management of accreditation processes (internal and external processes)

- Impartiality, ethics, confidentiality and management of conflicts of interest
- Quality management system of the accreditation body: documented procedures and records, internal audits, management reviews, continual improvement
- Planning and conducting assessments: preparation of assessment activities, document review and sampling approaches, on-site assessment techniques, witnessing of assessment activities
- Reporting of assessment results and management of non-conformities: evaluation of corrective actions, follow-up activities
- Accreditation decision-making processes and ensuring impartial decisions
- Management of complaints and appeals
- Remote assessments: use of ICT tools, data integrity and cybersecurity considerations, risk-based approaches and good practices
- Communication and professional conduct of AB staff during assessments

Conformity Assessment Standards and Assessment Practices

- Structure and hierarchy of conformity assessment standards (Levels 1–4), including fundamental principles, accreditation requirements, CAB requirements, and sector-specific/application-specific requirements
- Overview and application of Level 3 standards (ISO/IEC 17020, ISO/IEC 17021-1, ISO/IEC 17024, ISO/IEC 17025, ISO/IEC 17065, ISO 15189) with consideration of practical aspects of assessments:
 - Determination of audit duration under ISO/IEC 17021-1
 - Evaluation of competence, traceability and measurement uncertainty principles
 - Practical evaluation of measurement uncertainty across technical disciplines, application of decision rules
 - Assessment of calibration and test reports: traceability, validity of results, presentation and use of data
 - Risk assessment and risk management approaches for different CAB types
 - Validation, verification and method selection
 - Evaluation of reports from proficiency testing (PT) and interlaboratory comparison (ILC) results

Accreditation Schemes and Emerging Areas

- Accreditation of private and voluntary certification schemes
- Accreditation approaches for sustainability-related certification programmes, including:
 - environmental sustainability schemes
 - social sustainability schemes
 - sector-specific certification schemes
- Challenges and good practices in assessing conformity assessment bodies operating under private schemes

MODULE 4 - COOPERATION AND JOINT ACTIVITIES

Learning objectives:

To strengthen capacities of NABs experts for proper preparation, participation and successfully gaining /maintaining regional and international recognition through structured peer evaluation processes; To deepen understanding about the requirements and expectations of peer evaluations, advantages of performing mock assessments that simulate real evaluation scenarios and benefits from knowledge-sharing mechanisms, including the use of joint expert

databases; to equip the participants with insights on how close cooperation with the key stakeholders can contribute to building a coherent and effective national QI system.

Proposals for topics:

- Preparing for Peer evaluation for regional/international recognition
- Mock assessments
- Sharing technical expertise – Joint Databases technical experts - Best practices from EU
- Role of networks: European Quality Infrastructure Network (EQIN)
- Use of e platform for learning (e.g EA learning)
- Cooperation on local level and regulatory enforcement linkages – cooperation between accreditation and institutions from other QI pillars – regulatory bodies, metrology, standardization and market surveillance
- Stakeholder engagement - Transparent communication and involvement during organizational and procedural changes (e.g transition to new standards)
- Proactive work with EO, Chamber of commerce, other relevant organizations