


The tool is cool


Instruments and solutions for
effective energy and climate
planning

8 February
10:00 – 12:00 CET
Online Roundtable

Some rules for the webinar

 **During the meeting:**
Please make sure your microphone is muted

 **How to ask questions?**
Use the chat function to ask questions during the sessions or raise your hand to be unmuted for verbal questions

 **Technical support**
Please address all technical questions via the chat function to Roberta D'Angiolella or Axelle Gallerand, IEECP

Note: *Today's presentation is being recorded and will be made available within two weeks*

Welcome & introduction



Giulia Pizzini, IEECP

Agenda



Moderator: Giulia Pizzini (IEECP)

10:00 – Welcome and introduction, *Giulia Pizzini, IEECP*

10:05 – From Vision to Action: Empowering Regions with the REGIO1st Planning Framework, *Tim Mandel, Fraunhofer*

10:25 – Deep dive into the Regio1st Irish pilot, *Michael Doran, South-East Energy Agency*

10:45 – The IN-PLAN practice and the Italian experience , *Fabrizia Salvi, AREA Science Park*

11:05 – The PROSPECT+ Recommendations-Decision Matrix and Finance Readiness Tools, *Sophia Theodoropoulou, UPRC*

11:25 Panel discussion with speakers

11:55 Concluding remarks

From Vision to Action: Empowering Regions with the REGIO1st Planning Framework



Tim Mandel, Fraunhofer



From Vision to Action: Empowering Regions with the REGIO1st Planning Framework

EU roundtable | The tool is cool
08 February 2024



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Background | Energy efficiency first principle

Governance Regulation (EU) 2018/1999

Article 2(18) ‘energy efficiency first’ means taking utmost account in energy planning, and in policy and investment decisions, of alternative cost-efficient energy efficiency measures to make energy demand and energy supply more efficient, in particular by means of cost-effective end-use energy savings, demand response initiatives and more efficient conversion, transmission and distribution of energy, whilst still achieving the objectives of those decisions

Energy Efficiency Directive (EU) 2023/1791

Article 3

Energy efficiency first principle

1. In accordance with the energy efficiency first principle, Member States shall ensure that energy efficiency solutions, including demand-side resources and system flexibilities, are assessed in planning, policy and major investment decisions of a value of more than EUR 100 000 000 each or EUR 175 000 000 for transport infrastructure projects, relating to the following sectors:
 - (a) energy systems; and
 - (b) non-energy sectors, where those sectors have an impact on energy consumption and energy efficiency such as buildings, transport, water, information and communications technology (ICT), agriculture and financial sectors.
2. By 11 October 2027, the Commission shall carry out an assessment of the thresholds set out in paragraph 1, with the aim of downward revision, taking into account possible developments in the economy and in the energy market. The Commission shall, by 11 October 2028, submit a report to the European Parliament and to the Council, followed, where appropriate, by legislative proposals.
3. In applying this Article, Member States are encouraged to take into account Commission Recommendation (EU) 2021/1749 ^(*).
4. Member States shall ensure that the competent authorities monitor the application of the energy efficiency first principle, including, where appropriate, sector integration and cross-sectoral impacts, where policy, planning and investment decisions are subject to approval and monitoring requirements.
5. In applying the energy efficiency first principle, Member States shall:
 - (a) promote and, where cost-benefit analyses are required, ensure the application of, and make publicly available, cost-benefit methodologies that allow proper assessment of the wider benefits of energy efficiency solutions where appropriate, taking into account the entire life cycle and long-term perspective, system and cost efficiency, security of supply and quantification from the societal, health, economic and climate neutrality perspectives, sustainability and circular economy principles in transition to climate neutrality;
 - (b) address the impact on energy poverty;

Background | REGIO1st project

Objectives



Provide **decision-support** for regional authorities to apply the EE1st principle in their energy-related planning practices



Establish a **community of practice** for EE1st to ensure political commitment and societal acceptance through co-development of energy related scenarios



Support the introduction or strengthening of EE1st in the revision of **NECPs**, Regional Operational Programs and foster the enforcement of the Multilevel Climate and Energy Dialogue provision

Pillars

Development of a **decision support framework** and supporting **tools**

Implementation of the EE1st in the regional planning process (testing in six regions)

Upscaling the EE1st in the EU regional framework (replication to their local and regional authorities)

REGIO1st Planning Framework | Outline

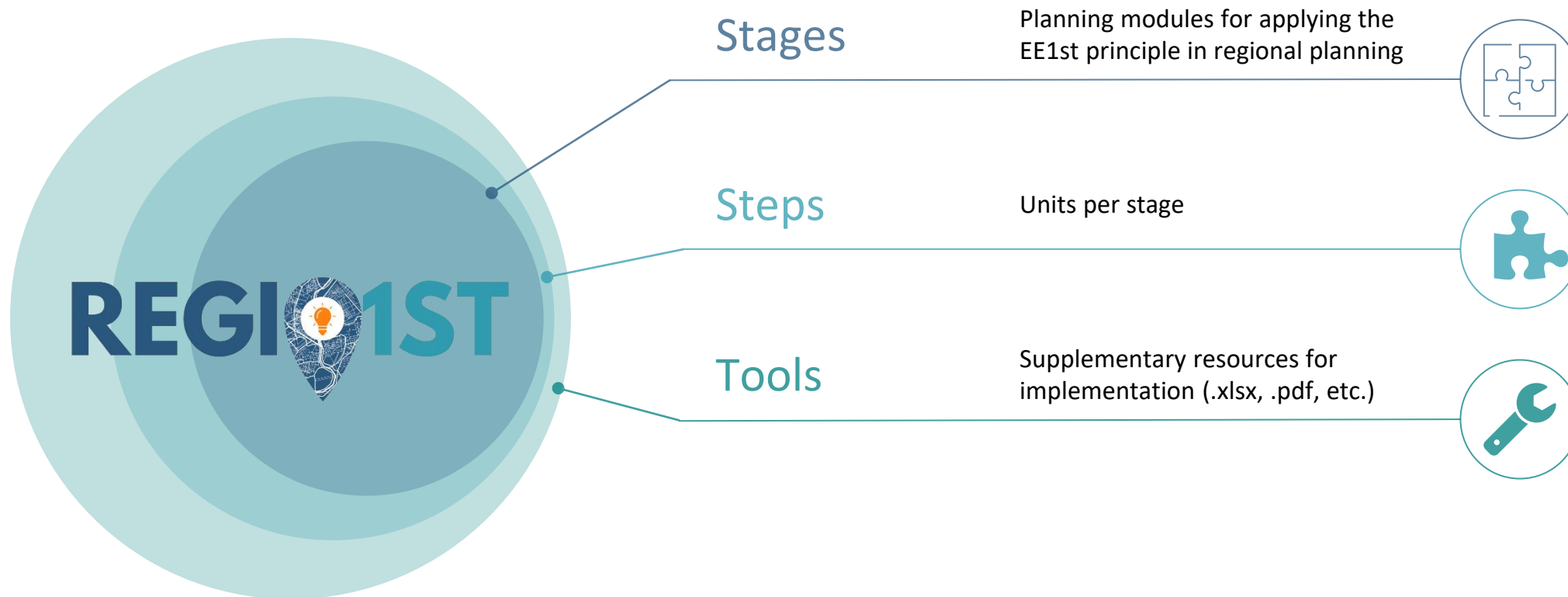
Objective | To facilitate and coordinate regional energy planning in line with the EE1st principle by structuring the decision-making process, identifying economically and socially viable energy efficiency solutions and involving stakeholders.

Key audiences | Regional and local authorities and energy agencies






Implementation | Structured decision support framework in website format, supported by dedicated tools in PDF and Excel formats















REGIO1st Planning Framework | Structure



REGIO1st Planning Framework | Details [1/2]

Stage		Steps		Tools	
01	Preparation	1.1 Determine the geographical area and scope of planning	1.2 Determine roles and responsibilities		Roles and responsibilities matrix
		1.3 Identify and review existing regional energy plans	1.4 Set up the framework for developing a regional energy plan		
02	Engaging stakeholders and building partnerships	2.1 Identify key stakeholders	2.2 Develop a stakeholder engagement plan		Stakeholder identification and analysis template
					Stakeholder engagement plan template
03	Reviewing energy objectives and targets	4.1 Review national visions and targets	4.2 Review national visions and targets		National and regional targets comparison template
		4.3 Set and define new regional objectives and targets	4.4 Discuss visions and targets with stakeholders		
04	Exploring the current regional energy system	3.1 Collate data to understand the current energy system	3.2 Analyze energy consumption by sector		Energy inventory data collection template
		3.3 Evaluate existing energy infrastructure	3.4 Review the current system with stakeholders		

REGIO1st Planning Framework | Details [2/2]

Stage	Steps	Tools										
<p>05 Cost-benefit analysis</p>	<table border="1"> <tr> <td data-bbox="794 386 1258 468">5.1 Assess the potential of energy efficiency solutions</td> <td data-bbox="1258 386 1719 468">5.2 Assess the potential of renewable energy resources</td> </tr> <tr> <td data-bbox="794 468 1258 549">5.3 Agree on modelling approaches and scenarios with stakeholders</td> <td data-bbox="1258 468 1719 549">5.4 Model future techno-economic options</td> </tr> <tr> <td data-bbox="794 549 1258 631">5.5 Monetize wider impacts</td> <td data-bbox="1258 549 1719 631">5.6 Identify least-cost combinations of solutions</td> </tr> <tr> <td data-bbox="794 631 1258 715">5.7 Assess the sensitivity of the analysis</td> <td data-bbox="1258 631 1719 715"></td> </tr> </table>	5.1 Assess the potential of energy efficiency solutions	5.2 Assess the potential of renewable energy resources	5.3 Agree on modelling approaches and scenarios with stakeholders	5.4 Model future techno-economic options	5.5 Monetize wider impacts	5.6 Identify least-cost combinations of solutions	5.7 Assess the sensitivity of the analysis		<table border="1"> <tr> <td data-bbox="1765 386 2076 715">  Technology catalogue tool </td> <td data-bbox="2076 386 2392 715">  Cost-benefit analysis tool </td> </tr> </table>	 Technology catalogue tool	 Cost-benefit analysis tool
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5.7 Assess the sensitivity of the analysis												
 Technology catalogue tool	 Cost-benefit analysis tool											
<p>06 Assessing the practical feasibility of least-cost energy solutions</p>	<table border="1"> <tr> <td data-bbox="794 733 1258 815">6.1 Assess distributional impacts</td> <td data-bbox="1258 733 1719 815">6.2 Evaluate the readiness of supply chains for proposed solutions</td> </tr> <tr> <td data-bbox="794 815 1258 893">6.3 Assess the workforce capacity for the implementation</td> <td data-bbox="1258 815 1719 893">6.4 Organize stakeholder consultations to review options</td> </tr> </table>	6.1 Assess distributional impacts	6.2 Evaluate the readiness of supply chains for proposed solutions	6.3 Assess the workforce capacity for the implementation	6.4 Organize stakeholder consultations to review options	<table border="1"> <tr> <td data-bbox="1765 733 2392 893">  Multi-criteria analysis tool </td> </tr> </table>	 Multi-criteria analysis tool					
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 Multi-criteria analysis tool												
<p>07 Defining actions and developing the regional energy plan</p>	<table border="1"> <tr> <td data-bbox="794 912 1258 993">7.1 Prioritize energy interventions and develop the regional plan</td> <td data-bbox="1258 912 1719 993">7.2 Establish a monitoring and evaluation system</td> </tr> <tr> <td data-bbox="794 993 1258 1072">7.3 Pursue public acceptance and finalize the regional energy plan</td> <td data-bbox="1258 993 1719 1072"></td> </tr> </table>	7.1 Prioritize energy interventions and develop the regional plan	7.2 Establish a monitoring and evaluation system	7.3 Pursue public acceptance and finalize the regional energy plan		<table border="1"> <tr> <td data-bbox="1765 912 2392 1072">  Monitoring template </td> </tr> </table>	 Monitoring template					
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<p>08 Implementation, monitoring and review</p>	<table border="1"> <tr> <td data-bbox="794 1090 1258 1172">8.1 Develop detailed implementation plans</td> <td data-bbox="1258 1090 1719 1172">8.2 Establish partnerships to support implementation</td> </tr> <tr> <td data-bbox="794 1172 1258 1243">8.3 Implement actions and communicate successes</td> <td data-bbox="1258 1172 1719 1243">8.4 Review and update the regional energy plan</td> </tr> </table>	8.1 Develop detailed implementation plans	8.2 Establish partnerships to support implementation	8.3 Implement actions and communicate successes	8.4 Review and update the regional energy plan	<table border="1"> <tr> <td data-bbox="1765 1090 2392 1243"></td> </tr> </table>						
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- Currently, the REGIO1st Planning Framework is being **applied in six European pilot regions**. The pilots not only test the usefulness of the framework, but also adapt it to different regional contexts, demonstrating its versatility and effectiveness in practice.
- To further support this process, a series of **online training modules** covering the eight phases of the planning framework are planned to run in the Spring and Summer of 2024.
- The REGIO1st Planning Framework will be **available online by April 2024** and will have an intuitive interface and interactive elements to increase user engagement.



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Deep dive into the Regio1st Irish pilot



**Michael Doran,
South-East Energy Agency**



Challenges in Delivering REGIO1st Principle

Using Tools



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REGIO1st

Challenges

- Identifying Stakeholders
- Persuading Decision Makers to embed EE1st Principle
- Develop decision support framework for applying the EE1st principle

Tools

- Identifying Stakeholders
- Influence v Affect v Interest
- Inventory Data Collection Template
- Stakeholder Engagement Plan

South East Energy Agency

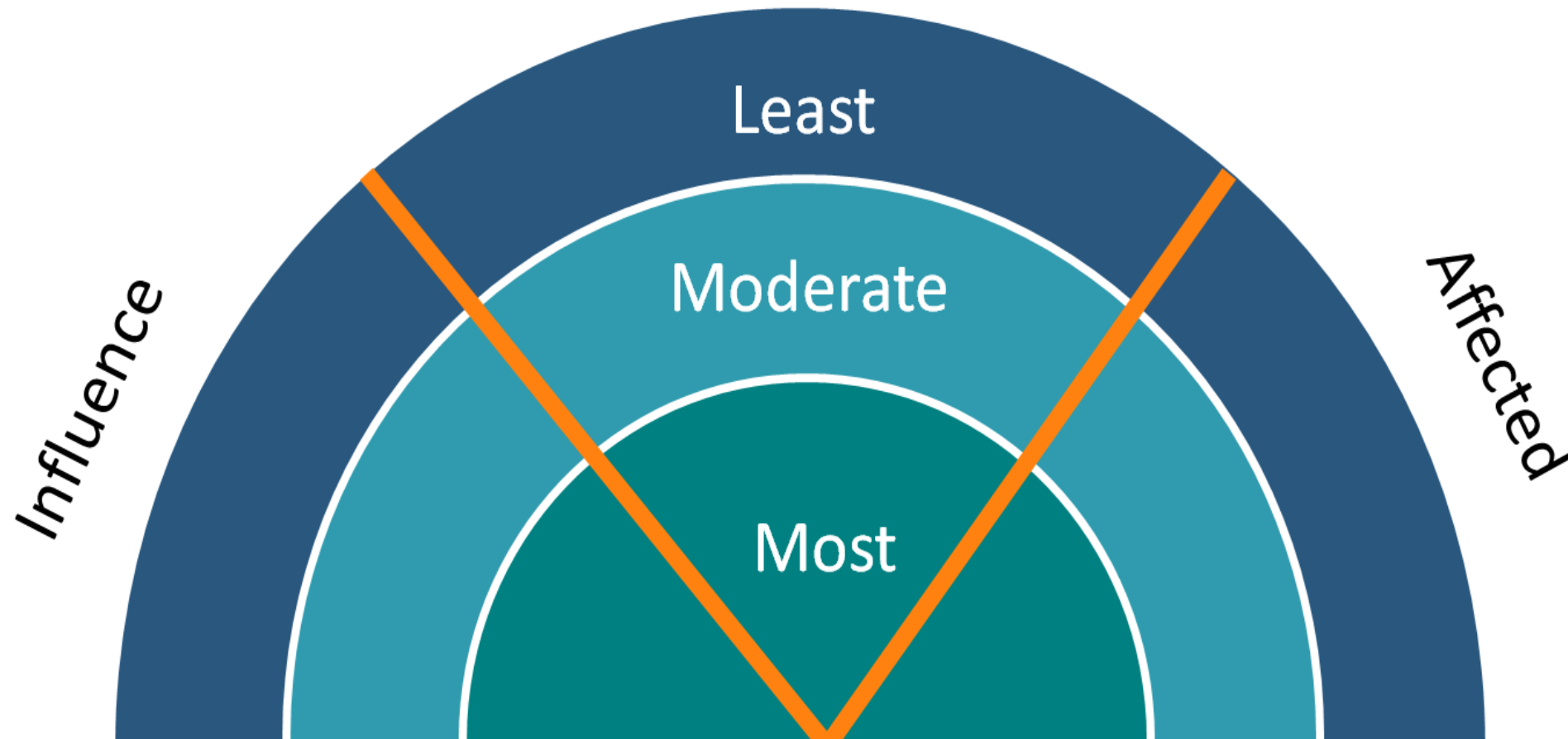
- 4 Local Authorities
- Pilot Projects(s)
- Differing approaches
- Recognise ambition and appetite
- Avoid competition
- Encourage EE1st Principle adoption

Identifying Stakeholders

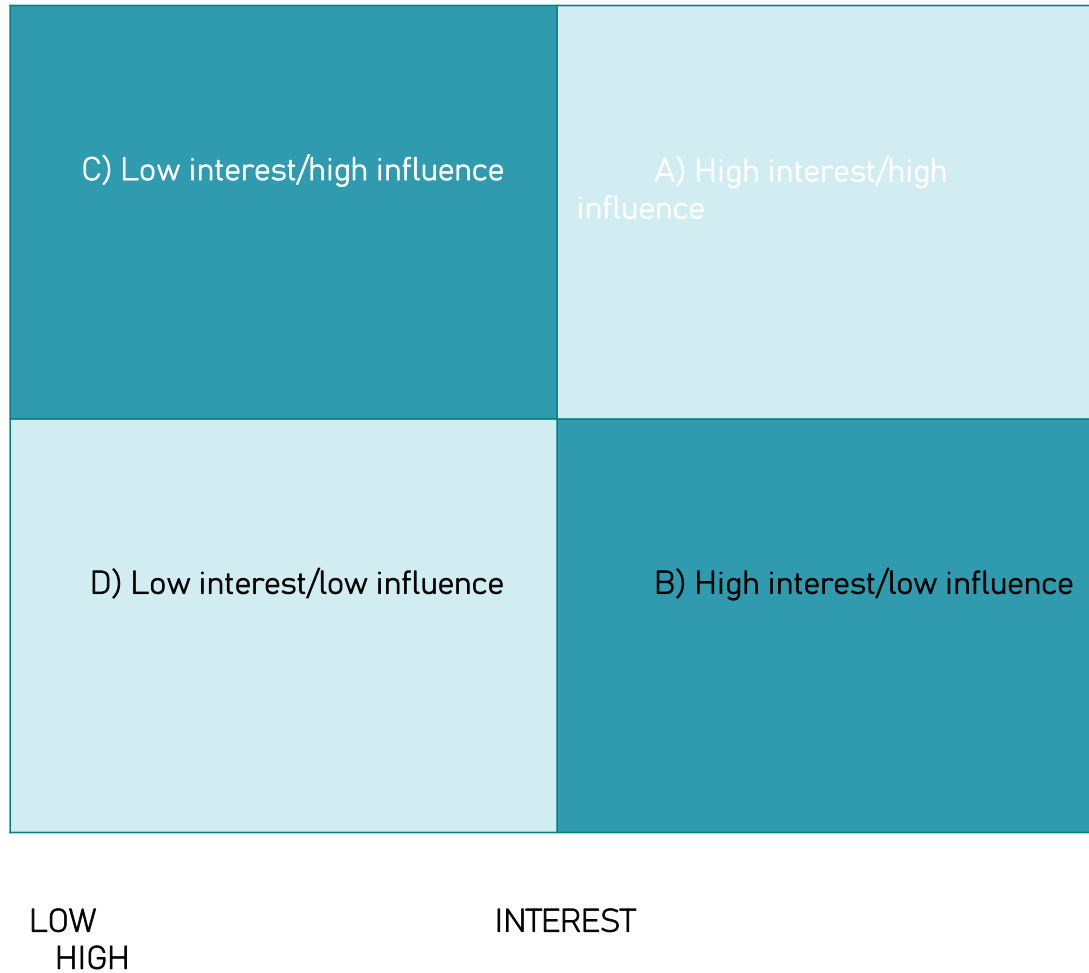
- Their knowledge of the issues relating to the policy
- Their existing relationship with the design, implementation and assessment of the policy (e.g. close or distant, formal or informal, level of support or opposition)
- How the policy affects them (e.g. positive or negative, direct or indirect)
- Their perceived power and ability to advance or hinder the design, implementation or assessment of the policy, or the participation processes
- Their relationships with other stakeholders and interests
- Their expectations of stakeholder participation
- Their willingness to participate
- Their type of organization (e.g. civil society, government, consumer, producer, trader)

Stakeholders Influence and Affect

Influence and affected



Stakeholder Influence v Interest



Tools do not have to be complicated
 Tools can be conceptual
 Tools are an aid to decision making



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The IN-PLAN practice and the Italian experience



Fabrizia Salvi,
AREA Science Park



Integrated energy, climate and spatial planning

EU online roundtable – The tool is cool: solutions for effective energy and climate planning

The IN-PLAN practice and the Italian experience

Fabrizia Salvi – Area Science Park


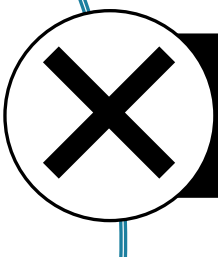




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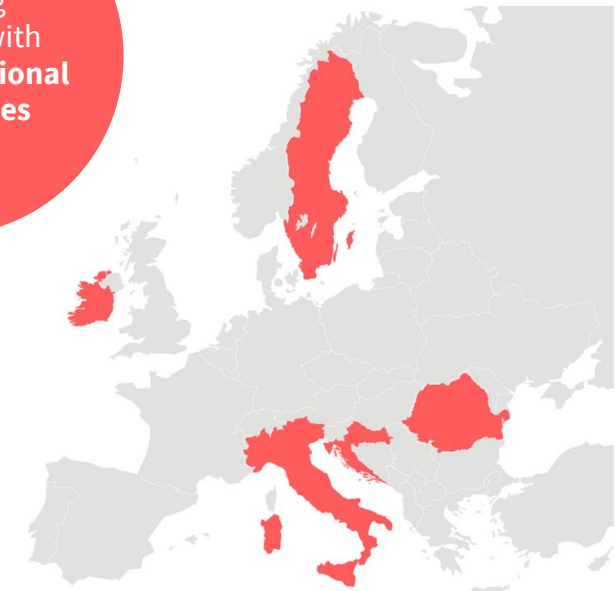
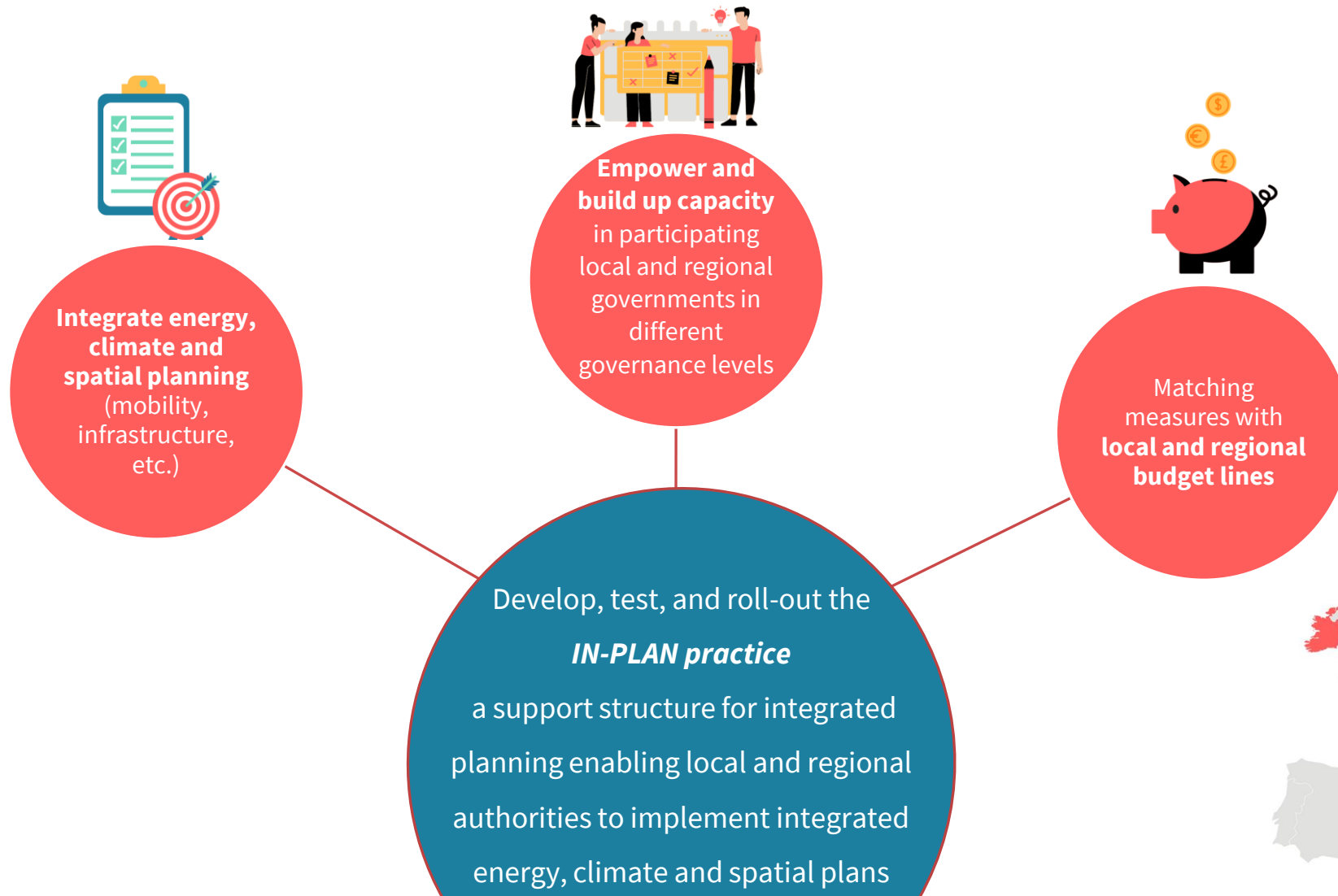
IN-PLAN partners



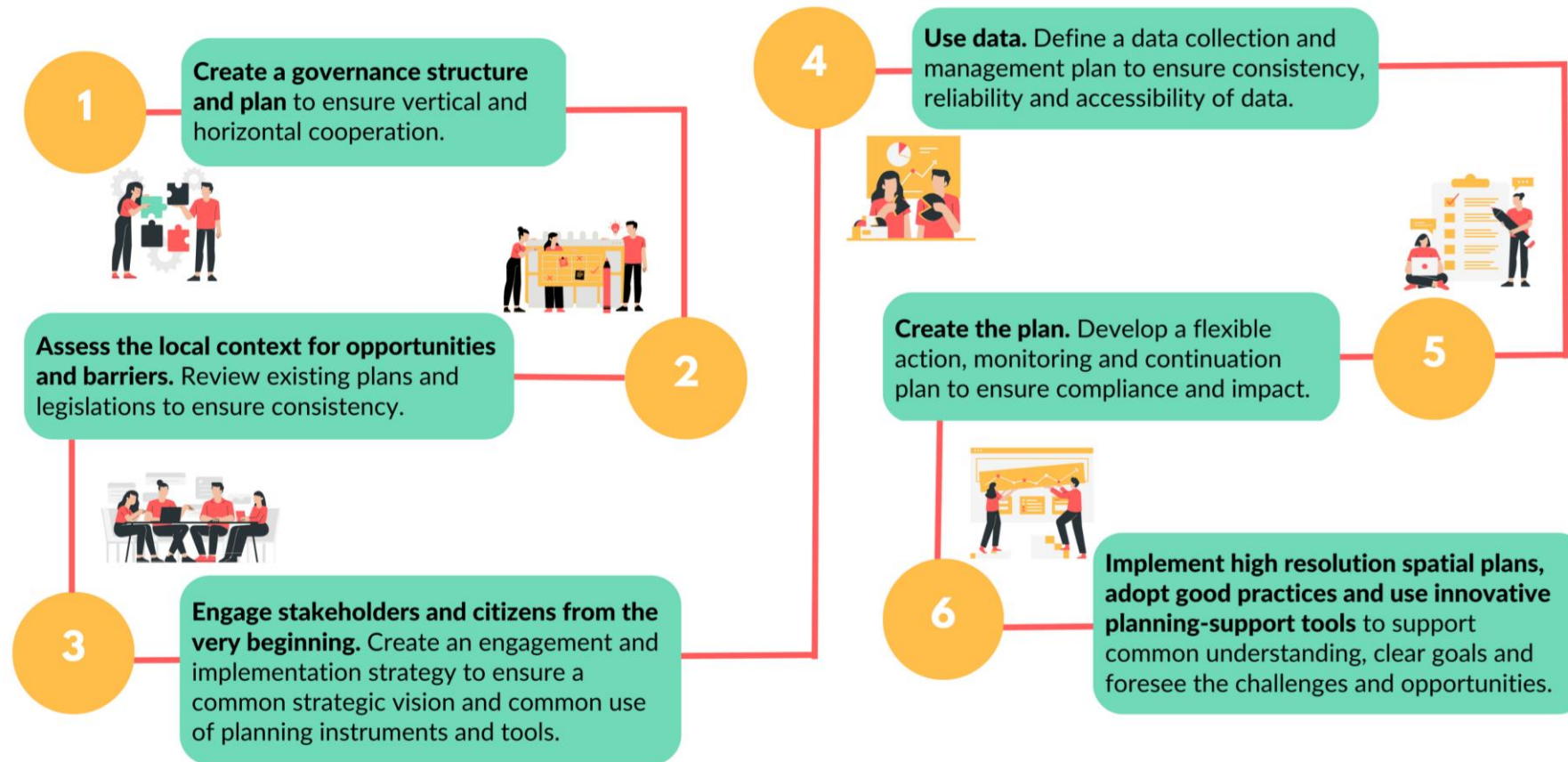
Challenges

-  Lack of capacity and mechanisms to enact and enforce binding energy and climate policies on a local or regional level
-  Lack of vertical and horizontal integration or alignment of strategies, plans, and policies
-  Lack of a systemic, integrated, and consistent approach to energy and climate planning
-  Lack of alignment between planning and the allocation of financial resources

IN-PLAN objectives

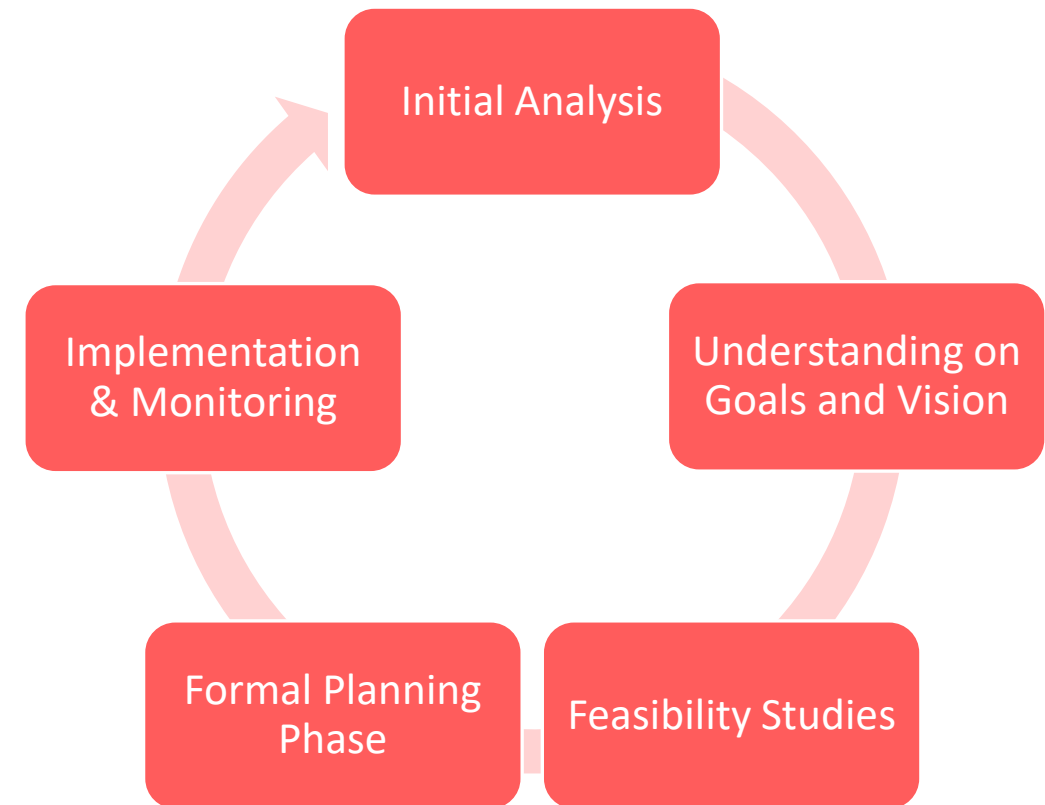


6 key steps for local authorities and urban planners to implement a successful integrated planning approach



Structure of the „Practice“

- ❖ Recommendations on how to better integrate climate and energy aspects into spatial planning
- ❖ Roughly structured alongside a spatial planning process
 - explains „What to do When“ →
 - step-by-step guidelines
 - depicts an „ideal *integrated* planning process“

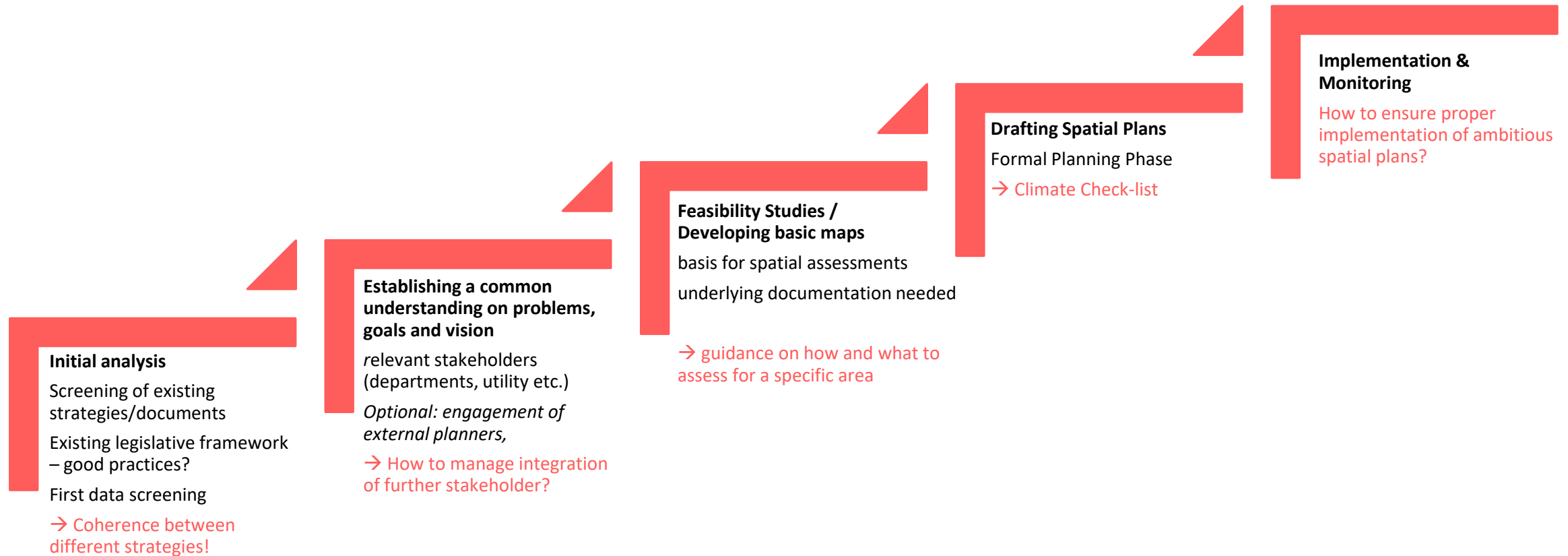


Purpose of the IN-PLAN Practice



-
- ❖ To serve as a **guidebook** / put forward **guidelines** for a municipality on **how to better integrate climate and energy aspects into spatial planning**
 - ❖ Offer a „**toolbox**“ (tools, instruments, programmes, methods to use)
 - ❖ List „**good practices**“
 - ❖ Build a (not too-detailed and „flexible“) framework that still needs to be adapted to fit local conditions (so as to be used in different processes / contexts / countries)
 - ❖ **The Practice:**
Recommendations & Guidelines
→ *Structured alongside the main steps of a spatial planning process (process-related)*

The Practice Structure



Identification of areas of intervention

Climate change mitigation

- Energy efficiency of buildings
- Heating and cooling supply
- Supply of electricity
- Street lighting

Climate change adaptation

- Green infrastructure, biodiversity and urban heat islands
- Flood prevention, landslides and water management

Mobility

- Mobility at rest
- Infrastructure

Examples of measures

Energy:

Higher energy efficiency standard in select zones (

Higher share of RES in select zones

Ban on use of fossil fuels for space heating and DHW preparation

Definition of DH zones

Climate:

Increased minimal share of green infrastructure in land plots within select zones

Mandatory separation of wastewater and rainwater

Mandatory implementation of rainwater management solutions

Consideration of landslide zones in construction

Integrated Spatial (Energy) Planning

- ❖ District heating extension as **big window of opportunity for reorganisation of public space!**
→ *inner-municipal process/coordination*
- ❖ to ensure **enough/adequate space for RES production / electricity grid requirements**
→ *land use plan*
- ❖ **To secure opportune areas RES production (PV!)** through building requirements
(exposure, direction etc.)
→ *zoning plans*
- ❖ **To counter urban heat islands** (e.g. through waste heat requirements)
→ *zoning plans*
- ❖ **To reduce heat stress in buildings** through certain measures (shadow, wind etc.)
→ *zoning plans*

Adapting the IN-PLAN practice to different contexts: the Italian framework

The Italian regulatory framework for spatial planning is included in a law going back to 1942...

Since the '70s **spatial planning is a regional jurisdiction**

Each region has its own regional spatial planning law

(19 regional laws and 2 provincial laws)

Issue	Central state	Regions
Environmental protection	Exclusive	×
Cultural heritage (<i>including landscape</i>) protection	Exclusive	×
Mobility planning <i>(e.g., public transport services regulation and management)</i>	×	Exclusive
Spatial planning <i>(e.g., national infrastructures and large transportation networks)</i>	Concurrent	
Regional spatial planning	×	Exclusive
Energy <i>(any kind, production, transportation and distribution)</i>	Concurrent	

Spatial planning



In Italy, due to its historical legacy, spatial planning has always been focused more on towns rather than on the territory

Urban planning/design VS Spatial (territorial) planning

Urban environment (town scale)
focused mainly on the built environment

Territorial scale (wide area)
multidisciplinary approach

The image features two maps side-by-side. The left map is an aerial photograph of a city with a river, overlaid with a grid and colored zones. The right map is a topographic map of a wide area with various colored zones and dashed blue arrows indicating directions. A green oval highlights the text 'Urban planning/design VS Spatial (territorial) planning' and the text below it. A black arrow points from the 'Urban planning/design' text to the 'Territorial scale' text.

The main needs of the Italian cities we have been working with

- Developing of a new general master plan (strategic+operational) including also measures related to climate change (adaptation and mitigation)
- Reaching climate neutrality by 2030 working on the Climate City Contract (EU Mission 100 Climate Neutral and Smart Cities by 2030)
- Developing a first core of a district heating network based on the exploitation of thermal waters
- Working on Operational Plans covering zoning and land use including measures tackling climate change and energy efficiency and monitoring system

The main barriers identified

Sectoral approach: different sectoral plans drawn up by different departments/offices with coordination difficulties

Lack of personnel and trained staff on new issues related to adaptation to climate change

Difficulty in accessing certain **data**

Difficulties in managing and sharing the **data** used for the development and monitoring of plans

Lack of appropriate **IT tools** to facilitate the development and integration of the different sectoral plans

The crucial role of data management in integrated planning

General principles:

- **Data Management is an essential tool** for informed decision-making and effective climate action at the city level and to provide the foundation for effective policies.
- **Skilled Personnel Required:** appointing a dedicated person (Data Manager) with the right skills ensures accurate data handling and analysis.
- **Initial Investment, Long-term Gains:** while there's an upfront cost (training, cleaning data, setting standards...), the return on investment is quick-saving time and ensuring consistent results over time and future resilience.

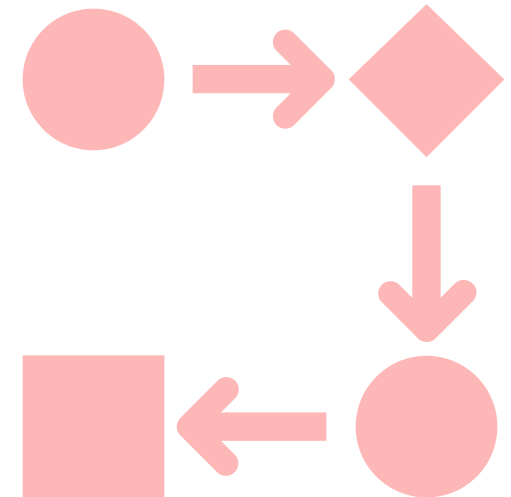
Adapting general principles to municipalities needs: some tips and hints

- **Data management and sharing** are the **basis for effective planning and monitoring processes** and as such they should become a **widespread good practice within municipalities regardless of their size**
- **Outsourced data management** can be a good way to start sharing and effectively managing data among departments within **small-size municipalities along the lines of a tailor-made Data Management Plan with the final goal to internalize it, owning the process** and making it a “good habit” within the municipality
- **Dependency from external consultants in the long run should be avoided** and a **specific Office/Department Manager** (IT Department? Legal Department? ...) **should be identified** and put in charge of the Data Management process, coordinating efforts and contributions of all involved offices/departments

Data Management Plan

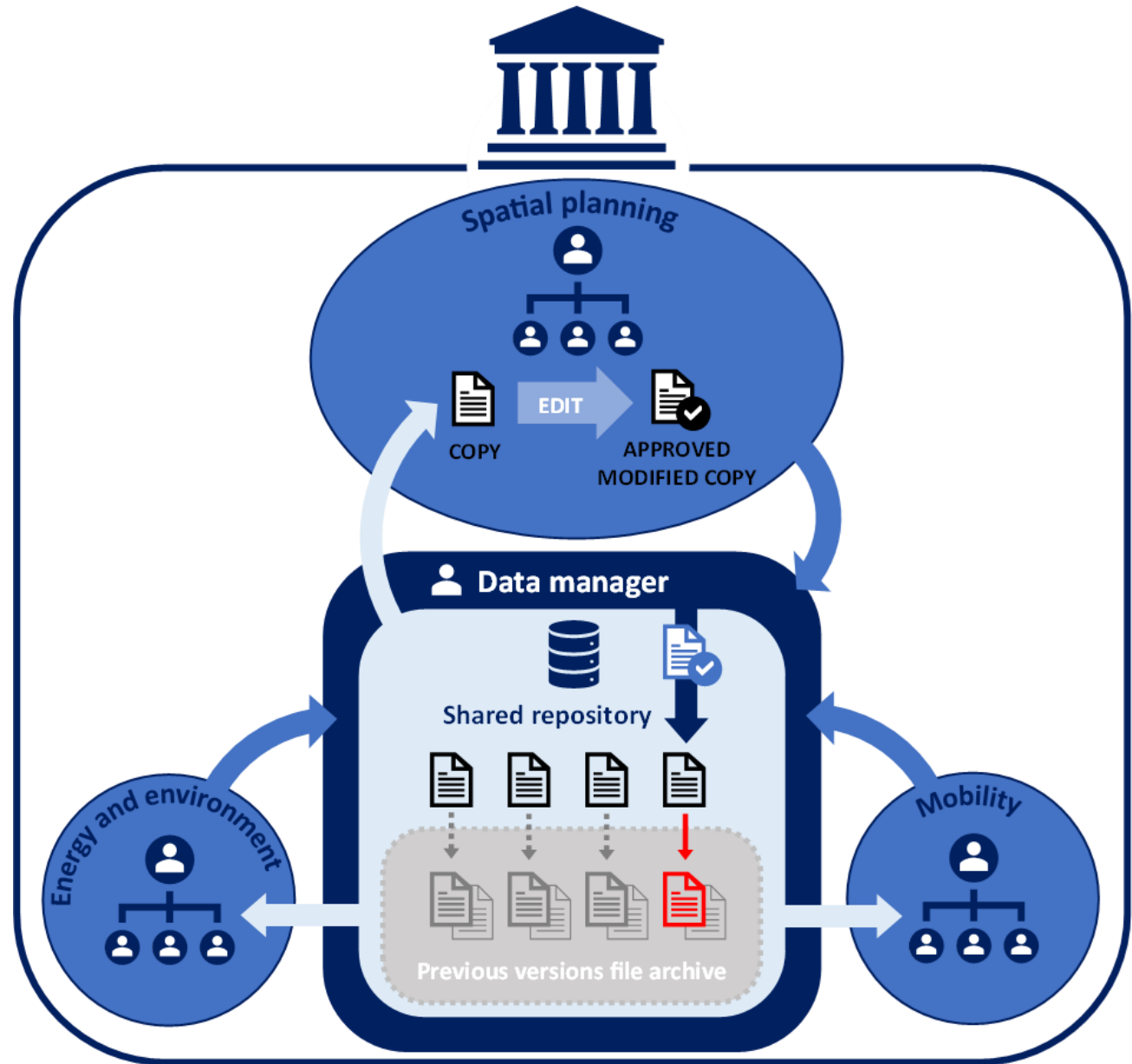
Guidelines to help municipalities in drafting their **Data Management Plan**, a fundamental document that describes the life cycle of the data management of a project so that the **procedures** for:

- The generation/acquisition
- the processing
- the conservation
- data sharing



are unique and adopted by all employees of the different offices

Process and people involved



Data Management Plan

Main categories of data used in integrated planning

- geographical and cartographic
- infrastructure and building stock
- energy
- mobility
- environmental (meteorological, meteomarine, climate projections)
- demographic, social and economic

Urban Heat Islands: the experience of Prato (Tuscany)



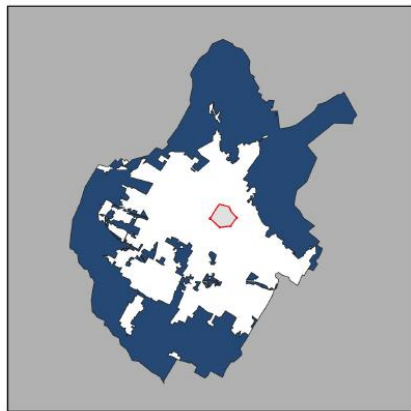
Piano Strutturale 2024

TAVOLA UNICA

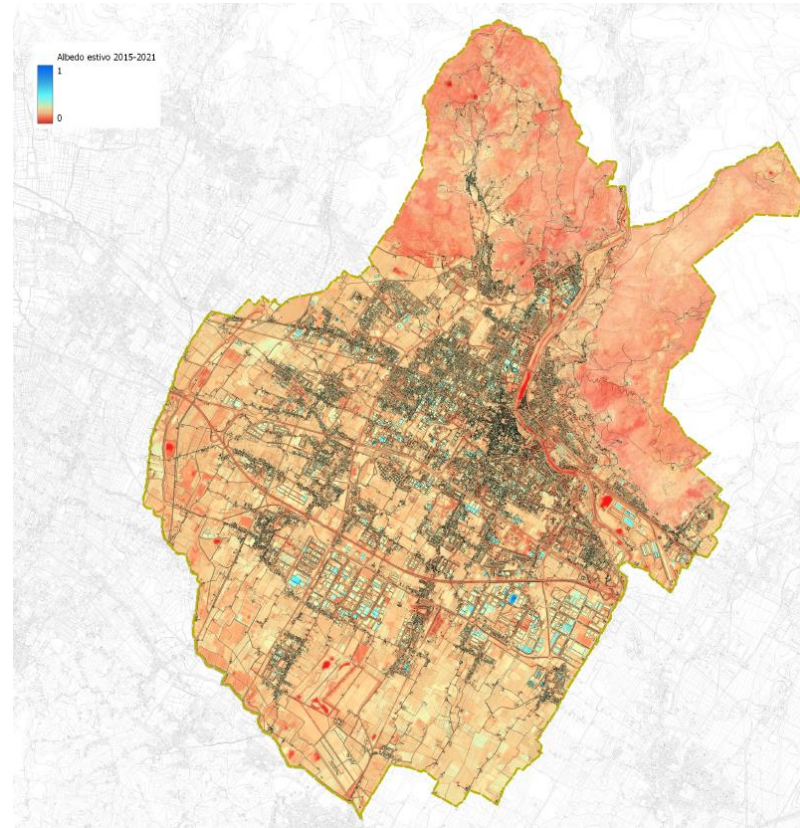
QC_AA_1

Carta delle aree di criticità ambientali e delle isole di calore

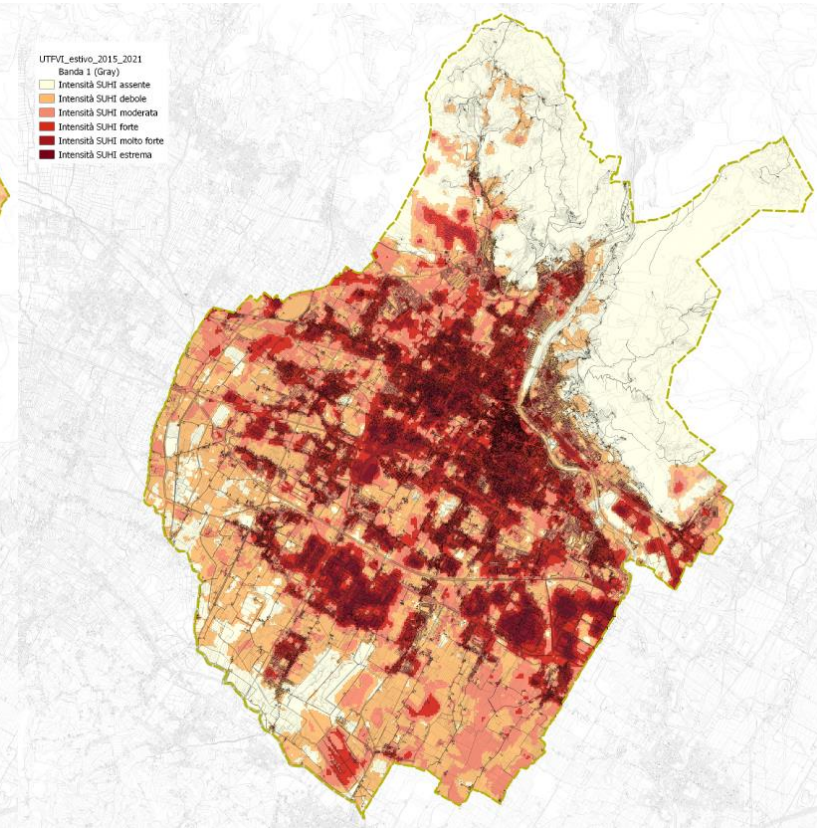
SCALA VARIE



Adozione 2023



Summer albedo (2015-2021)



Summer Urban Thermal Field Variance Index

Municipality of Prato: potential forest/greenery areas





Thank you.

For more info, follow our hashtag, visit our website or contact us:



#LifeINPLAN



fedarene.org/project/in-plan/

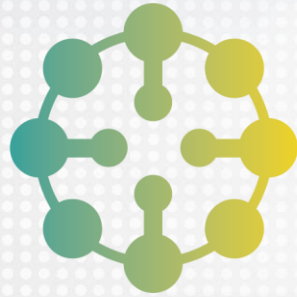


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The PROSPECT+ Recommendations- Decision Matrix and Finance Readiness Tools



Sophia Theodoropoulou,
UPRC



PROSPECT+

Capacity building for cities and regions - from learning to action!

PROSPECT+ tools for local authorities

**The Recommendations-Decision Matrix Tool &
The Finance Readiness Tool**

Sophia Theodoropoulou – UPRC



The PROSPECT+ project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101023271





What is PROSPECT+ about ? **1**
Overview-Methodology-Outcomes

The Recommendations-Decision Matrix Tool **2**
What is the idea behind it and how it works?

The Finance Readiness Tool **3**
A brief introduction

PROSPECT+ partners



- ❖ **Title:** Capacity building for cities and regions - from learning to action!
- ❖ **Duration:** 42 Months (Started in September 2021)
- ❖ **Project website:** <https://h2020prospect.eu/>

❖ 11 Project partners

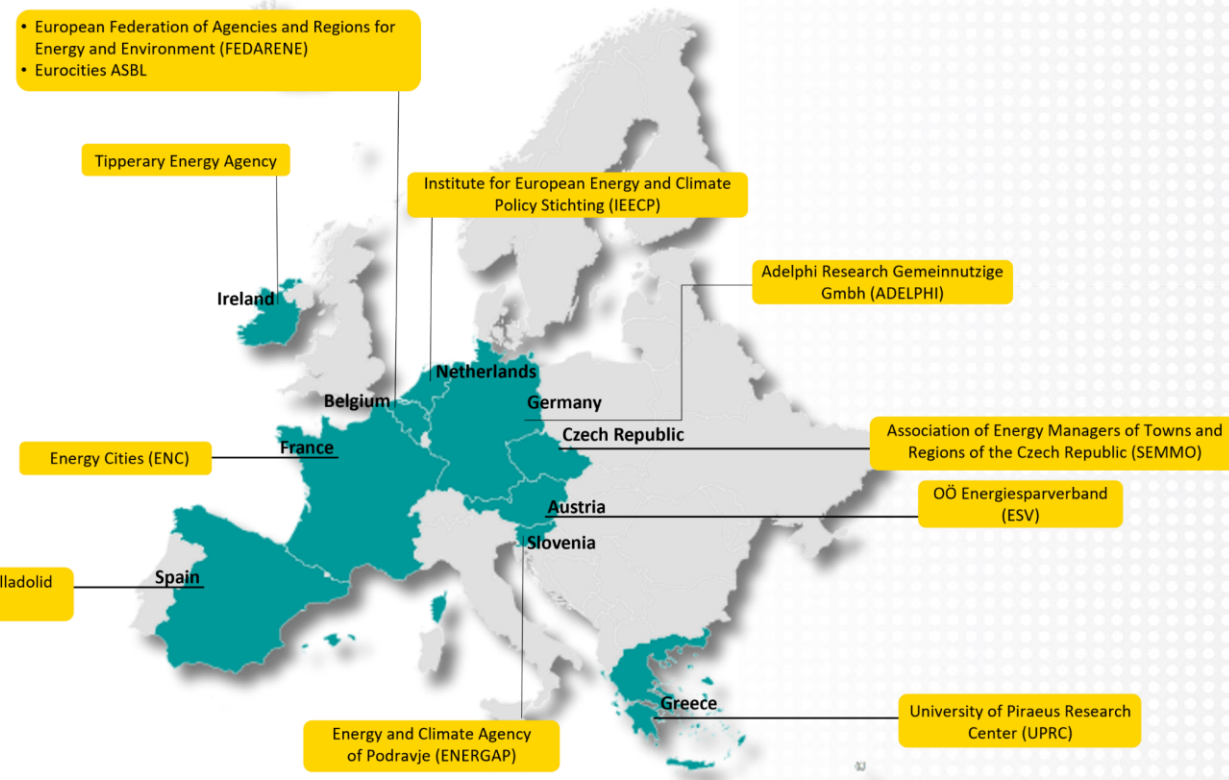
3 Knowledge hubs



3 Networks of cities and regions



5 Regional Agencies



Strategic objectives



PROSPECT+ is a highly **participatory** project that :

✓ builds the **capacity** of public authorities in **financing** sustainable energy plans,

✓ enhances **decision-making** of public authorities for them to be **leaders** in implementing energy efficiency measures,

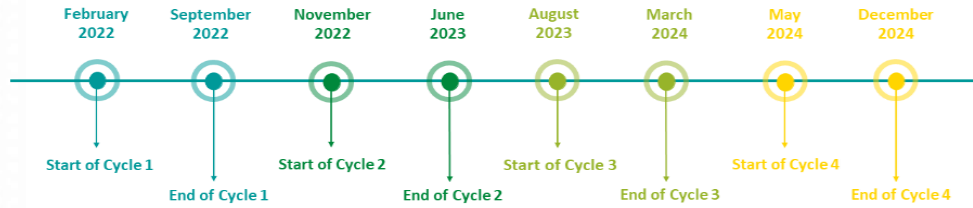
✓ helps public authorities **profiting** of all the experience available, taking inspiration from their **peers**,

✓ promotes **synergies** among public authorities and other actors in an intra-European network.

The PROSPECT+ Capacity Building Programme



4 Learning Cycles



5 Thematic Areas



3 Peer Methods



5 Steps



Supports cities/regions on their way to adopt **innovative financing** for their local energy and climate actions

The PROSPECT+ Tools



COOL!

01

Recommendations-Decision Matrix Tool

02

Finance Readiness Tool



Assists local authorities in their first decision-making steps against a set of financing options.



Provides an ease of implementation rate (%) for each financing scheme.



The financing scheme with the majority of positive answers is likely to be a suitable choice.

Assesses the financial maturity of the planned or ongoing local sustainable energy projects.

Indicates the level of finance readiness of the project and highlights possible funding sources

If required, provides suggestions for potential improvements and recommendations of available support mechanisms.

Support **decision-making** in local authorities

The Recommendations-Decision Matrix Tool



01 First developed under the previous H2020 PROSPECT. **Background**

02 Updated under H2020 PROSPECT+ by UPRC. **New Version**

02 <https://rdmtool.teeslab.unipi.gr> **Available online**

In a nutshell....

A **practical** and **easy-to-use** tool, **free** and **accessible** to all local authorities looking at ways to increase or diversify their funding base to bridge their municipal infrastructure needs.



5 sectors of recommendation

1. Public buildings
2. Private buildings
3. Transport
4. Public Lighting
5. Cross-sectoral



For each sector, specific **innovative financing schemes** are applied.

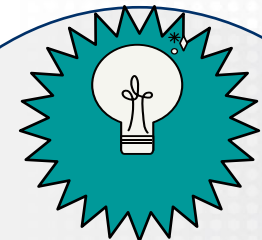
A specific set of questions per sector represents the prerequisites for implementing each scheme.
Pre-determined answers are provided (Yes, Partially, No).



The analysis **does not** identify an “optimal” solution.

Describes how and to what extent each option meets the aforementioned prerequisites.

Empowers users to draw conclusions, by looking at the results.

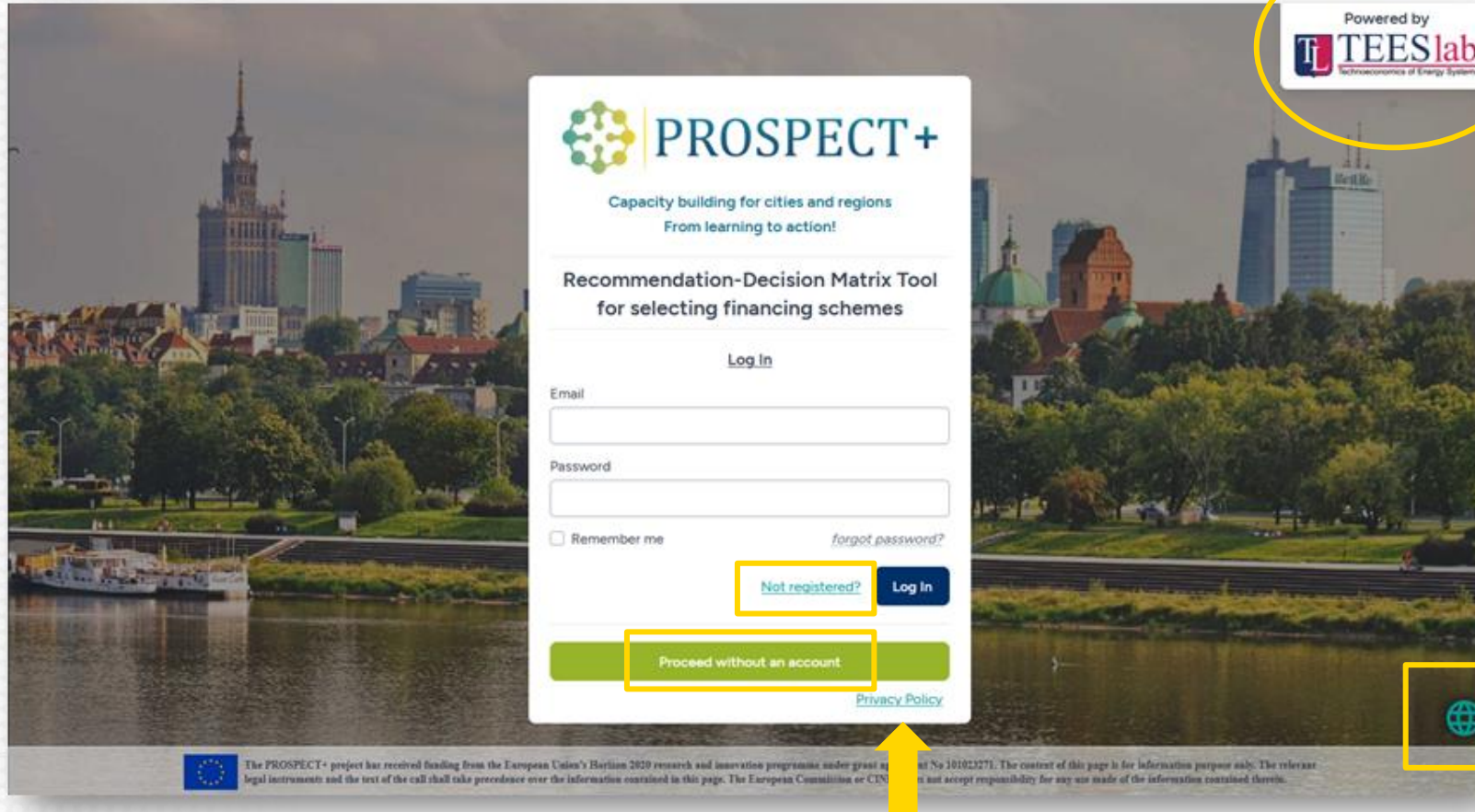


Quick finance readiness check

Optional part of the tool.
Provides a preliminary self-assessment analysis for the users to evaluate the financial maturity of their projects.

Innovative financing is an option for urban climate and sustainable development projects, but cities, municipalities and regions need to know how to activate it.

Before starting



Options

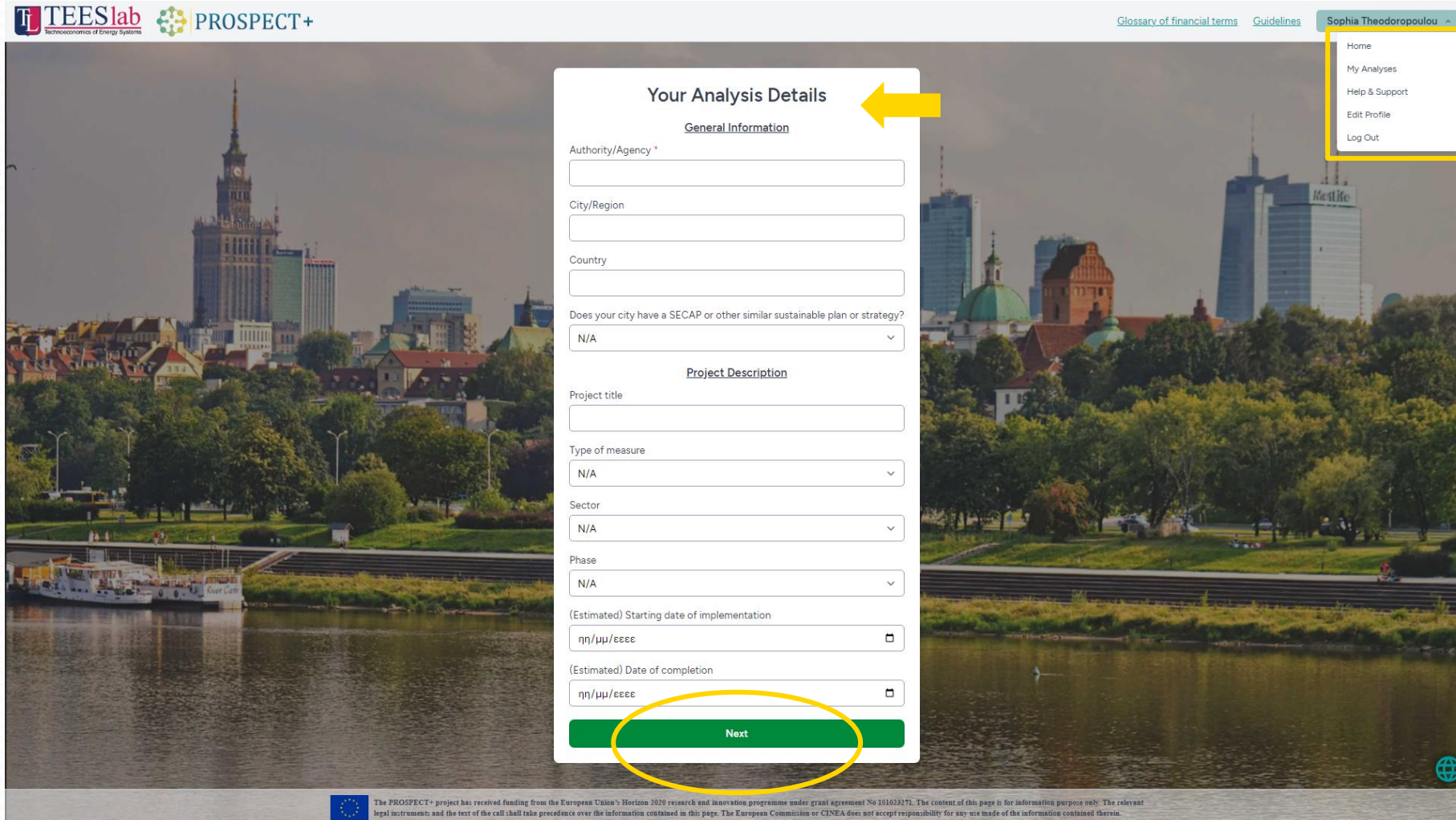
- Change language.
- Access the privacy policy.
- Create an account.
- Proceed without registering.

Entering the tool



The screenshot displays the PROSPECT+ website interface. At the top left, the TEESlab and PROSPECT+ logos are visible. The top right navigation bar includes links for 'Glossary of financial terms', 'Guidelines', and a 'Menu' dropdown. The 'Menu' dropdown is open, showing 'Home', 'Help & Support', and 'Log In'. The main content area features a white box titled 'Recommendation-Decision Matrix Tool for selecting financing schemes'. This box contains introductory text, a list of sectors (Public Buildings, Private Buildings, Public Lighting, Transportation, Cross-Sectoral), and a prominent green 'Start!' button. Below the main text is a row of partner logos including IEECP, PEDARENE, valladolid, EURO CITIES, TEESlab, SCIENCE PARK, energap, THERMAL energy, SEMMO, and adelphi. A 'Privacy Policy' link is located at the bottom right of the white box. At the very bottom of the page, a small text block provides information about the project's funding from the European Union's Horizon 2020 program.

Step 1: Project analysis



TEESlab **PROSPECT+** [Glossary of financial terms](#) [Guidelines](#) **Sophia Theodoropoulou**

Your Analysis Details

General Information

Authority/Agency *

City/Region

Country

Does your city have a SECAP or other similar sustainable plan or strategy?
N/A

Project Description

Project title

Type of measure
N/A

Sector
N/A

Phase
N/A

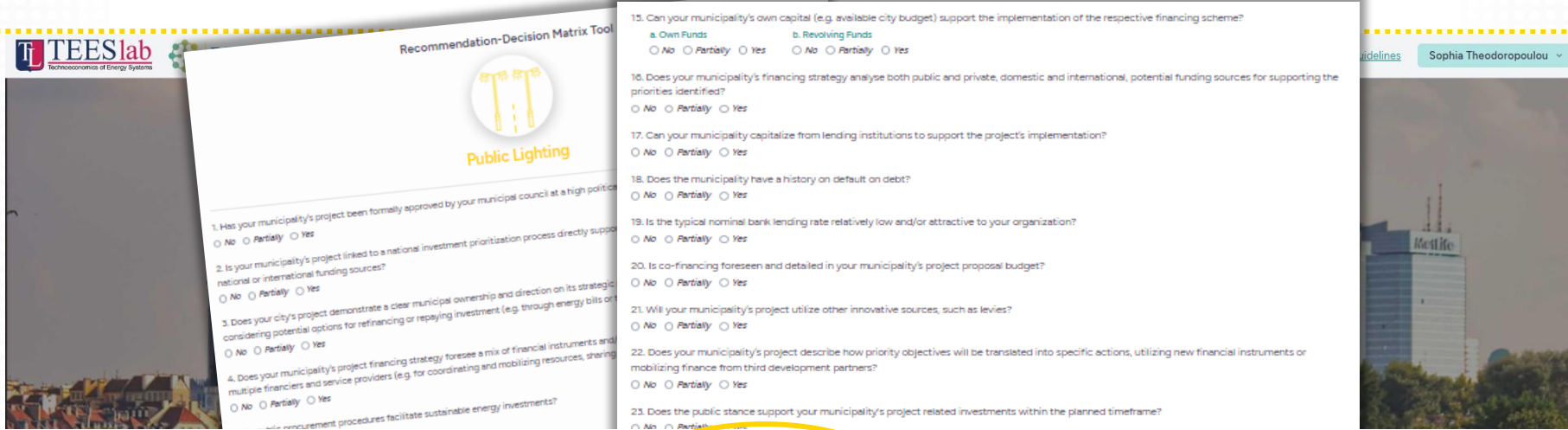
(Estimated) Starting date of implementation
ηη/μμ/εεεε

(Estimated) Date of completion
ηη/μμ/εεεε

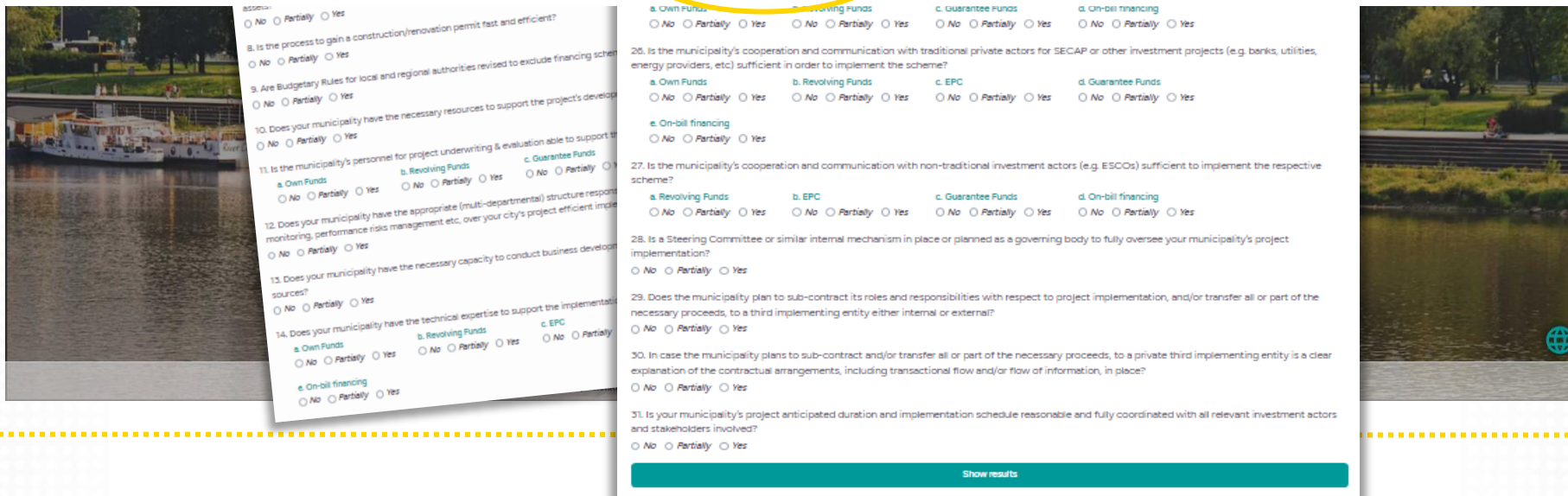
Next

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Step 2: Taking the self-assessment



Show results



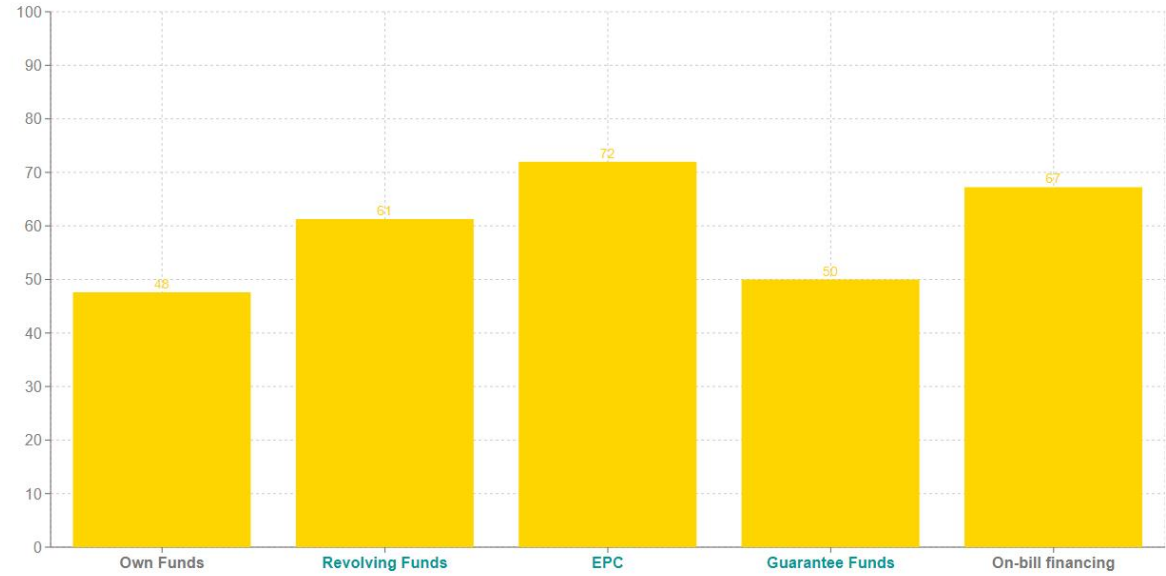
Step 3: Results

TEESlab Technoeconomics of Energy Systems | PROSPECT+ | [Glossary of financial terms](#) | [Guidelines](#) | Sophia Theodoropoulou

Show results

Thank you for using the PROSPECT+ Decision Matrix Tool to check which financing scheme will be the most suitable for your local authority to implement the planned or ongoing local sustainable energy project for your city. Please note that all results have been automatically determined based on your answers, indicating an ease of implementation rate (%) for each available financing scheme against the general framework conditions. More information on the set of financing alternatives is also available on the PROSPECT+ [Learning Handbooks](#).

Public Lighting

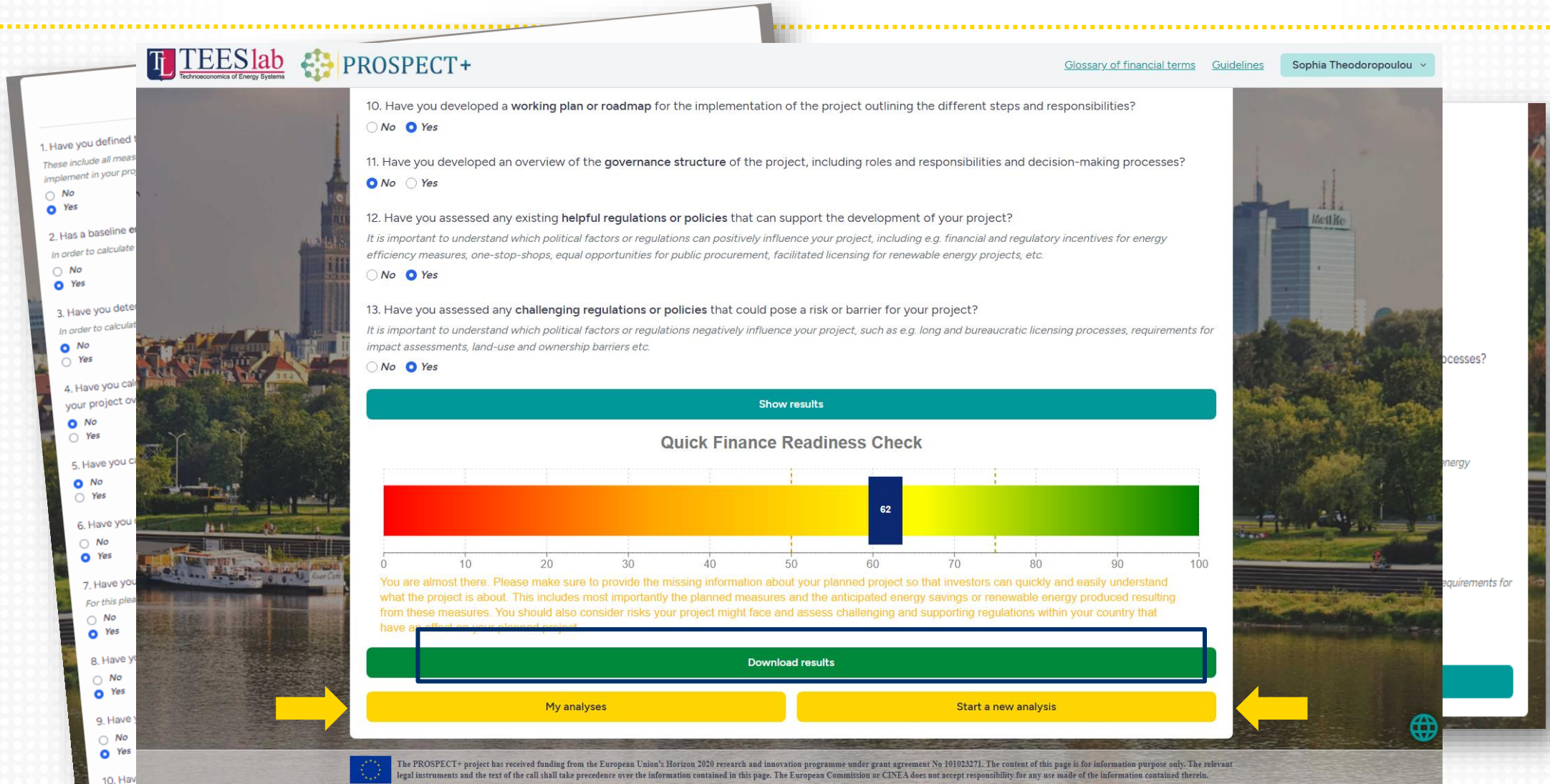


Financing Scheme	Ease of Implementation Rate (%)
Own Funds	48
Revolving Funds	61
EPC	72
Guarantee Funds	50
On-bill financing	67

Download results | **Continue to the Quick Finance Readiness Check**

My analyses | **Start a new analysis**

Step 4: Quick Finance Readiness Check



The screenshot shows the PROSPECT+ web interface for a Quick Finance Readiness Check. The page header includes the TEESlab logo, the PROSPECT+ logo, and navigation links for 'Glossary of financial terms', 'Guidelines', and a user profile for 'Sophia Theodoropoulou'. The main content area displays a list of 13 questions with radio button options for 'No' and 'Yes'. Questions 10, 11, 12, and 13 are visible, with 'Yes' selected for 10, 11, and 13, and 'No' selected for 12. Below the questions is a 'Show results' button. A progress bar titled 'Quick Finance Readiness Check' shows a score of 62, with a color gradient from red (0) to green (100). Below the bar is a text box with advice: 'You are almost there. Please make sure to provide the missing information about your planned project so that investors can quickly and easily understand what the project is about. This includes most importantly the planned measures and the anticipated energy savings or renewable energy produced resulting from these measures. You should also consider risks your project might face and assess challenging and supporting regulations within your country that have an effect on your planned project.' Below the text are 'Download results' and 'My analyses' buttons, and a 'Start a new analysis' button. A footer contains a European Union logo and funding information.

10. Have you developed a **working plan or roadmap** for the implementation of the project outlining the different steps and responsibilities?
 No Yes

11. Have you developed an overview of the **governance structure** of the project, including roles and responsibilities and decision-making processes?
 No Yes

12. Have you assessed any existing **helpful regulations or policies** that can support the development of your project?
It is important to understand which political factors or regulations can positively influence your project, including e.g. financial and regulatory incentives for energy efficiency measures, one-stop-shops, equal opportunities for public procurement, facilitated licensing for renewable energy projects, etc.
 No Yes

13. Have you assessed any **challenging regulations or policies** that could pose a risk or barrier for your project?
It is important to understand which political factors or regulations negatively influence your project, such as e.g. long and bureaucratic licensing processes, requirements for impact assessments, land-use and ownership barriers etc.
 No Yes

Show results

Quick Finance Readiness Check

0 10 20 30 40 50 60 70 80 90 100

62

You are almost there. Please make sure to provide the missing information about your planned project so that investors can quickly and easily understand what the project is about. This includes most importantly the planned measures and the anticipated energy savings or renewable energy produced resulting from these measures. You should also consider risks your project might face and assess challenging and supporting regulations within your country that have an effect on your planned project.

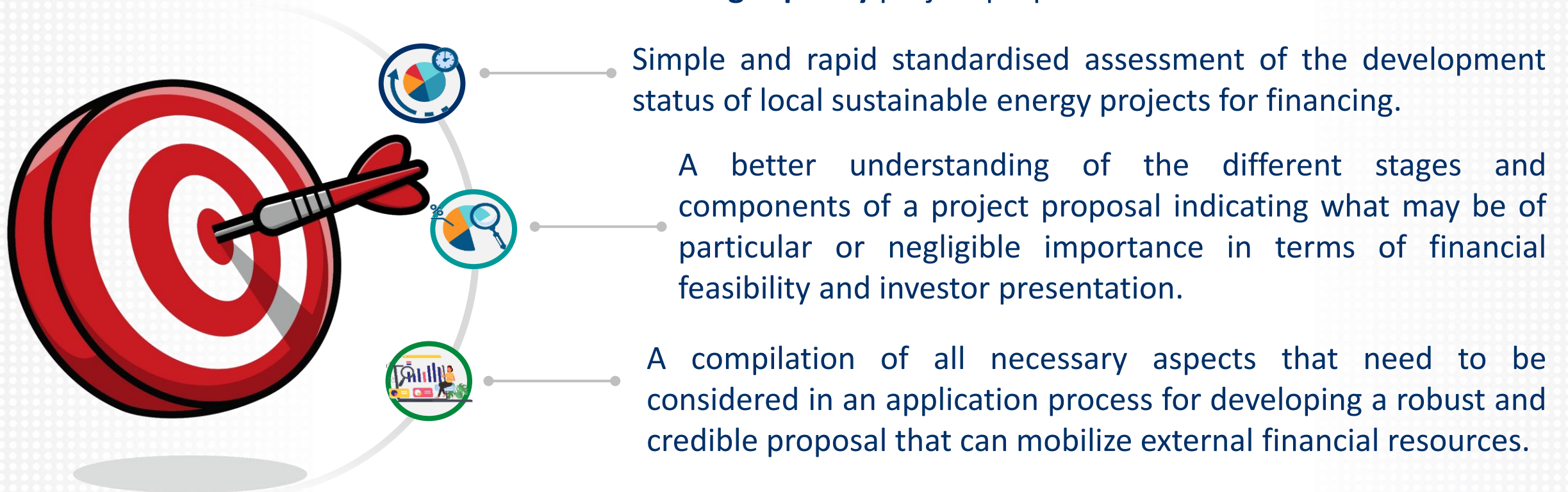
Download results

My analyses **Start a new analysis**

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The Finance Readiness Tool

A **helpful, flexible** and **user-friendly** methodology for local authorities to provide potential financiers with a **high-quality** project proposal.



Individual components of a financial project proposal are not understood or taken into account well enough, lacking relevant details for potential investors and financiers.

Steps and content

01

General information
about the public
authority

Questions: 5

02

Fiduciary information
necessary for
accessing financing
opportunities.

Questions: 8

03

Scope of proposal
to assess the
completeness of the
information detailed
in the planned project.

Questions: 22

04

Project management
to assess the
management
structure of the
planned project.

Questions: 3

05

**Promoters and
stakeholders**
to investigate the
overall coherence for
project planning.

Questions: 8

06

**Legal and regulatory
analysis**
ensuring successful
implementation of
planned project.

Questions: 7

07

Additional information
for **EPC financing** for
public authorities
planning to use it.

Questions: 7

How it works?



- An **input mask** where users need to provide:
- Personal data and contact details.
- Specifications about the planned financing instrument and planned funding sources for the investment.

- Thematically focused on **EPCs**.
- To be processed only if this instrument is actually foreseen for the project.
- Otherwise is simply ignored.

Step 1

Steps 2-6

Step 7

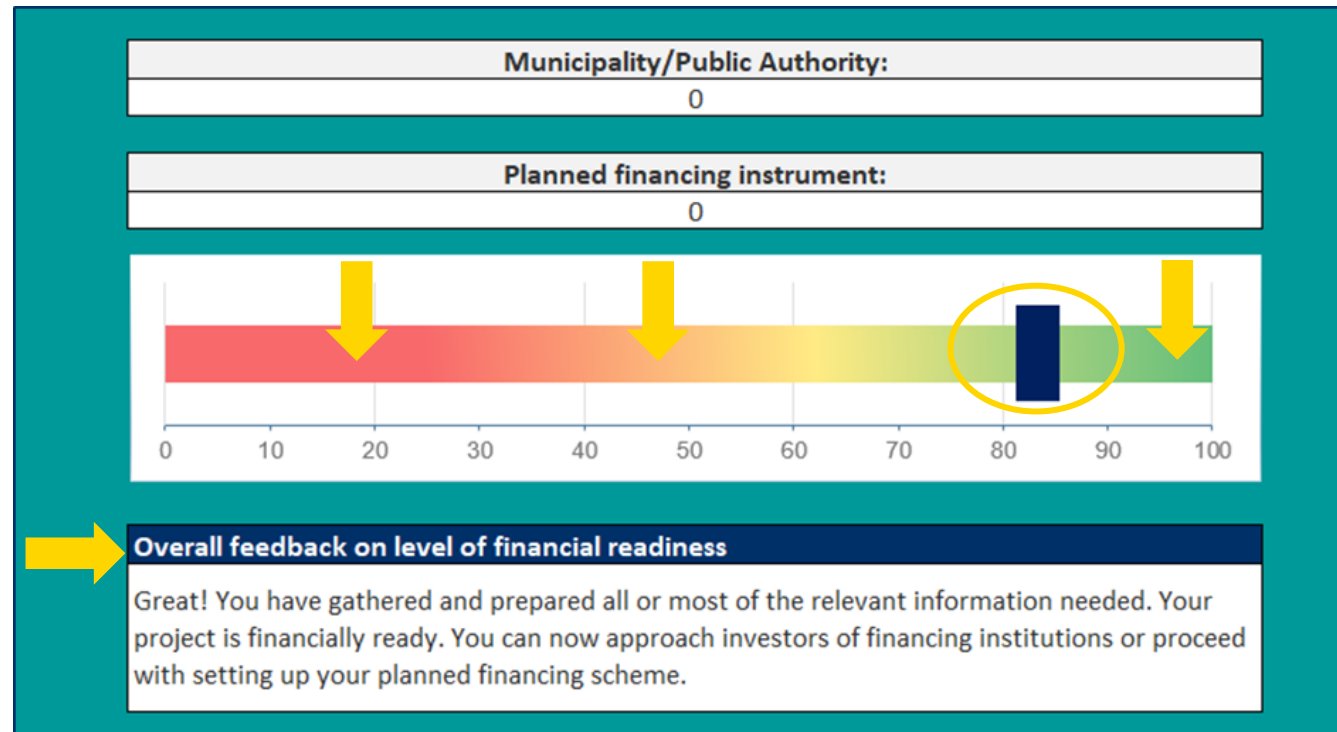
Summary and Feedback

- A **checklist of questions** to be answered.
- Drop-down menus provide predefined options.
- “Not planned” = 0 points
“Foreseen” = 2 points
“Ongoing” = 3 points

- “No” = 0 points
“Yes” = 3 points

- An **overall score** is provided which determines the finance readiness of the project.
- **Individual feedback** is also provided per each thematic area.

Feedback on the level of financial readiness, in line with the level of the progression bar.



Financial readiness status of the project based on the achieved results.

Score less than 50%.

Score more than 75%.

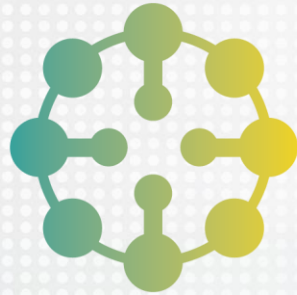
Score between 50% - 75%.

A summary based on the overall results is displayed as a color scale with graduation labels from 0 to 100.

The **PROSPECT+ Finance Readiness Tool** is under development and will be released:

- ✓ as an **online tool**
- ✓ by **adelphi**
- ✓ at the **end** of the project





PROSPECT+

Thank you!

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stheodor@unipi.gr



The PROSPECT+ project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101023271

 h2020prospect.eu

 [#H2020Prospect](https://twitter.com/H2020Prospect)

Panel discussion



Giulia Pizzini,
IEECP



Tim Mandel,
Fraunhofer



Michael Doran,
South-East Energy Agency



Sophia Theodoropoulou,
UPRC



Fabrizia Salvi,
AREA Science Park

Thank you

Follow the projects!



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cities and regions |
PROSPECT+



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 # LifeINPLAN

 #LifeINPLAN



www.fedarene.org/project/in-plan



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