## Output factsheet: Tools

<table>
<thead>
<tr>
<th><strong>Project index number and acronym</strong></th>
<th>CE51TOGETHER</th>
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<tbody>
<tr>
<td><strong>Lead partner</strong></td>
<td>Province of Treviso</td>
</tr>
<tr>
<td><strong>Output number and title</strong></td>
<td>O.T2.2 Toolkit containing 4 Integrated Financial and contracting tools</td>
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<tr>
<td><strong>Responsible partner (PP name and number)</strong></td>
<td>University of Maribor</td>
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<td><strong>Delivery date</strong></td>
<td>11.2017</td>
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**Summary description of the key features of the tool (developed and/or implemented)**
The toolkit containing 4 Integrated Financial and Contracting tools is the result of a co-working process started in an early phase of the project implementation, where 4 sub-groups were created to deliver the 4 respective deliverables that compose this toolkit.

The co-working methodology was proposed by the University of Maribor, which included the proposal of standard templates for the development of the tools in order to guarantee the most possible coherence and “corporate” identity to the different integrated tools.

The 4 tools were developed by 4 separate working groups:

1. **Model of Epic** - Energy performance Integrated Contract delivered by Province of Treviso, University of Maribor and Municipality of Paks;
2. **Transnational Good Energy Governance handbook** - delivered by the Slovak Innovation and Energy Agency (SIEA), Energy Agency Vysočiny (EAV) and City of Zagreb;
3. **Set of subsidies and incentives integrated with Demand Side Management** - delivered by Energy Agency Vysočiny (EAV), Hegyvidék (Municipality of 12th District of Budapest) and Slovak Innovation and Energy Agency (SIEA);
4. **Set of financial instruments integrated with DSM** - developed by Municipality of Pak, Province of Treviso and City of Zagreb.

These 4 tools were graphically harmonized in its English version by the University of Maribor. The project partners translated some parts of the tools in their native language in order to use the tools’ content for integrating their local training materials.

The first tool is devoted to develop a new possible contractual solution that is the EPIC. Energy Performance Integrated Contract (EPIC) represents an innovative tool in the hands of Public Administrations (Pas), as a new type of “integrated” Energy Performance Contract (EPC) through which technical and social aspects of energy consumption are considered together, and an improved energy performance of buildings is guaranteed not only by technological investments, but also by a better organization of the use of spaces and by the involvement of building users towards a more aware behaviour in the use of buildings.

The second aims at providing a common guide to the project partners when planning their Pilot Actions in their respective pilot buildings clusters. The ambition of this deliverable/tool is to create a standardized platform that the project partners can use to plan their Pilot Actions, by using not only a common template, but a common basis of thinking and reasoning, together with their buildings stakeholders.

The third is devoted to give a theoretical overview and provide practical guidance of demand side management (DSM). A set of subsidies and incentives are discussed and personalised tips are provided for the most typical public building types. The listed subsidies and incentives are partly financial, partly social. Financial incentive can be an energy performance contract, social incentive can be an award.

The fourth lists the measures that have to be taken into account during the preparation of energetic investments. It clarifies the applicable technologies and soft interventions of energy efficiency investments and presents the related financial sources by starting with the basics of EU financing tools to the details of alternative financial such as crowdfunding or green loan.
Max. 500 characters
The NUTS of reference where the output has been conceptualized is SI012, Podravska but the entire partnership has contributed to its development. Also the integrated tools will be tested in all 85 pilot buildings during pilot actions (WP T3), therefore NUTS regions will be:

- ITH34, Province of Treviso,
- CZ063, Kraj Vysočina,
- SI012, Podravska,
- HR041, Grad Zagreb,
- PL213, Miasto Kraków,
- HU231, Baranya,
- HU101, Budapest,
- SK010, Bratislavský kraj,
- PL213Krakow (PL) NUTS,
- HU23, Del Dunantult.

Expected impact and benefits of the tool for the concerned territories and target groups

Max. 1,000 characters
The expected impact and benefit for the concerned territories and target groups (public building owners, managers and decision makers) is to:
- Integrate the interdisciplinary learning platform, available both in English and other partners’ languages, that can be potentially used by a wider audience than the one involved in the TOGETHER;
- provide the target groups with reusable material that can be easily exploited and consulted in order to increase their skills to manage the complexity of the real estate sector, linking up different energy efficiency tools, including the Demand Side Management, meant as the modification of the consumers’ demand for energy;
- create innovation when planning energy efficiency in public buildings and enhance the in-house competencies of the public administration, even when approached by external companies presenting - sometime promising - quick results and advantages;
- introduce to less “experienced” energy planners a set of guideline materials to be used in their pilot arenas to trigger cascading effects.

Sustainability of the tool and its transferability to other territories and stakeholders
The sustainability of the Toolbox is crucially linked to its availability on the project website and project library. The 4 tools are made available as an “open source material” to be used by all potentially interested persons/group of persons, together with the transnational training model. The tools are transferable to other territories and stakeholders. The standardization of each tool in terms of graphical form and internal structure allow the potential reader to get easily familiar with all the other tools and to rapidly consult the content thanks to well-structured index and executive summary.

These 4 tools developed at transnational level by the TOGETHER partnership might be used not only by our consortium, but also by other organizations working with local authorities and wishing to improve the energy-related knowledge and skills of the building owners, managers and decision makers.

Transferability to other territories and stakeholders will be ensured through:
1. making the tools widely available so that also other interested parties could use it to improve their thematic knowledge and skills and to take inspiration for taking a possible inspiration to “Invest” in financial and contractual approaches to the energy efficiency.
2. The fact that toolkit is already available in the project website. A specific “widget- integrated tools” was created in order to highlight their availability, both in English and in some project partners’ language. They are linkable from the “publication widget”.
3. The fact that they are embedded in the on-line project library
4. The fact that they will be embedded in the final e-book that is in progress, to be delivered at the closure of the project
5. The fact that project partners will also promote it on the occasion of different event.

Lessons learned from the development/implementation process of the tool and added value of transnational cooperation

It is possible to summarize the lessons learned as follows:
- it is crucial to agree on the working flow and co-working peer review process at a very early phase of the process. That is really valid in cooperation projects, where there are different backgrounds, knowledge and experiences in producing handbooks and thematic content; in the TOGETHER case, the Thematic Leader has strongly coordinated the process, taking advantage of its academic approach and experience in the production of papers and training material;
- It is crucial to produce appealing material, rich in examples and practical cases, with an eye-catching layout (within the limits of the technical contents it presents) to attract the technical experts to look at the tools. A clear index and harmonized structures can guarantee a better “acceptance” and understanding of the content;
- It is important to combine - if possible- the availability of new tools with a training path: the reference to the tools and their integration in an on-going training path can guarantee a concrete transfer from the “thinkers” to the “doers” and give the content a practical appeal;

Transnational cooperation has a crucial role in the delivery of the local training material in the partners’ regions as:
- it produced a common framework of reference in a much more cost-effective way compared to individual efforts, and it achieved economies of scale;
- it introduced an interdisciplinary approach to energy efficiency never tested before in all the partners’ regions;
- it helps to make use of wider and more diverse pool of knowledge and experience.

References to relevant deliverables and web-links
If applicable, pictures or images to be provided as annex
Max. 1.000 characters

References to the relevant deliverables:
- D.T2.2.1 Model of Epic - Energy Performance Integrated Contract - delivered by Province of Treviso, University of Maribor and Municipality of Paks,
- D.T2.2.2 Transnational Good Energy Governance handbook - delivered by the Slovak Innovation and Energy Agency (SIEA), Energy Agency Vysočiny (EAV) and City of Zagreb,
- D.T2.2.3 Set of subsidies and incentives integrated with Demand Side Management - delivered by Energy Agency Vysočiny (EAV), Hegyvidék (Municipality of 12th District of Budapest) and Slovak Innovation and Energy Agency (SIEA),
- D.T2.2.4 Set of financial instruments integrated with DSM - delivered by Municipality of Pak, Province of Treviso and City of Zagreb.

and web-links:

The following material is attached as an annex: