



SISMA – Supporting Innovative Schemes in the MED Area

Priority Axis 2. Fostering low-carbon strategies and energy efficiency in specific
MED territories: cities, islands and rural areas.

Specific Objective 2.1. To raise capacity for better management of energy in public
buildings at transnational level.

D 3.5.1 SISMA Strategy

Activity 3.3 Development of SISMA Strategy

Work Package 3 – Studying

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Partners involved: all Partners

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Preface

This document is elaborated within the framework of SISMA project (Supporting Innovative Schemes in the MED Area) co-financed partly by the European Regional Development Fund – Interreg MED programme.

SISMA aims to develop innovative financing schemes that leverage European Structural Funds (and other public funds available to the regional or local administrations) on private financial resources to finance investment projects that lead to significant energy retrofits of public buildings.

Abbreviations

SISMA	Supporting Innovative Schemes in the Mediterranean Area
IFM	Innovative Financial Mechanism
LPA	Local Public Authority
EPC	Energy Performance Contract

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1 Introduction

The SISMA project aims at fostering the adoption of an innovative financial mechanism by Local Public Authorities (LPAs) to significantly increase the energy renovation of public buildings through effective bankable projects.

This document outlines the general strategy that will facilitate the uptake process of the Innovative Financial Mechanisms (IFMs) developed within SISMA among LPAs.

2 Objectives

The strategy described in this document aims to facilitate and boost the uptake of the SISMA toolkit, i.e. the SISMA Model and supporting materials, across the MED countries. The strategy includes an action plan which builds on awareness-raising and capacity-building activities at local level that will ultimately ensure the uptake of the proposed solutions.

The goal is to reach target groups both through the promotion of the Project outputs and the transfer of knowledge thus developing new skills and competencies that can better address the innovative features of the solutions developed within SISMA. The strategy operates at cultural, professional and administrative level to foster a shared vision on the alternative ways to finance energy investments. This will build knowledge and confidence in these new instruments ultimately enabling the implementation of EPCs. It is crucial that all parties involved are aware of the expectations, needs and financial capacity at stake to create the right connections between demand and supply of energy services. The SISMA strategy outlines the sequence of actions to put in place to achieve these goals at Project level as well as at country level.

3 The Strategy: general framework

The SISMA Strategy provides a common framework for PPs to facilitate and accelerate the adoption of the SISMA toolkit by LPAs across the MED countries.

Preconditions for the implementation of the Strategy are the identification of the target audience and of the most appropriate tools for reaching that type of audience in terms of communication and dissemination materials.

The Strategy comprises a 2-level approach. The first one foresees the implementation of activities for the promotion and dissemination of the SISMA toolkit, the second one aims at fostering capacity building initiatives supported by tutoring activities and technical assistance addressing LPAs' needs.

4 The Strategy: local action plans

The proposed action plan provides a standard that will be implemented at local level and adjusted to context-specific needs.

The identified target audiences are **political decision-makers** (municipal administrators), **technical experts** (municipal technicians), **ESCOs, banks** and **investment funds**.

The key activities of the Strategy can be summarized by the following three-stage methodology:

- i. **awareness-raising**
 - a. *energy ambassadors*
 - b. *info kit*
 - c. *promotional meetings*
- ii. **capacity-building**
 - a. *workshops*
- iii. **tutoring**
 - a. *contact points & technical assistance networks*

The proposed action plan can be easily adopted and replicated in any Mediterranean country thus guaranteeing the sustainability of the Project outputs in the long term. Moreover, all other tools developed within SISMA will be available for LPAs to further support the implementation of the plan. Namely, the training scheme (D3.4.2), which provides the materials for a 4-module course addressing all relevant topics for a full understanding of the tools developed within SISMA, and the SET users' manual to facilitate the use of the SET tool. In support to the key activities and supporting materials, the most appropriate methods and channels for reaching the target audiences should be developed and activated (i.e. communication and dissemination campaigns).

Each stage of the Strategy is described in the table below.

		(i) AWARENESS-RAISING & PROMOTION
1	energy ambassador	<ul style="list-style-type: none"> ❖ <i>objective</i> <ul style="list-style-type: none"> • create awareness and engagement among the target groups ❖ <i>how</i> <ul style="list-style-type: none"> • appointment of an energy ambassador within local and regional energy agencies ❖ <i>responsibilities</i> <ul style="list-style-type: none"> • managing contacts with LPAs • event planning • leading and coordinating the awareness-raising and promotion campaign
2	info kit	<ul style="list-style-type: none"> ❖ <i>objective</i> <ul style="list-style-type: none"> • promote the Project outputs and related initiatives (i.e. action plan) ❖ <i>how</i> <ul style="list-style-type: none"> • development of dissemination materials
3	promotional meetings	<ul style="list-style-type: none"> ❖ <i>objective</i> <ul style="list-style-type: none"> • promotion of the SET tool and the associated info kit (what is it for, how does it work, opportunities for LPAs) ❖ <i>how</i> <ul style="list-style-type: none"> • organization of dedicated meetings targeting political decision-makers, technical experts, ESCOs, financial institutions ❖ <i>contents and practicalities</i> <ul style="list-style-type: none"> • meeting planner: energy ambassador • attendees: energy ambassador + decision-maker + municipal technician • duration: 1 to 2 hours ❖ <i>actions</i> <ul style="list-style-type: none"> • energy ambassador to build contact database (prefer direct contacts whenever possible, try to reach as many LPAs as possible)

		<ul style="list-style-type: none"> energy ambassador to schedule and lead meetings
		(ii) CAPACITY BUILDING
4	workshops	<ul style="list-style-type: none"> ❖ <i>objective</i> <ul style="list-style-type: none"> scale up local capacity for understanding and implementing the SISMA Model ❖ <i>how</i> <ul style="list-style-type: none"> organization of half-day-workshops (training course-like) for presenting the functions and applications of the SET tool ❖ <i>contents and practicalities</i> <ul style="list-style-type: none"> the workshops will provide hands-on training on the use of the SET tool through the implementation of practical case studies supporting materials available to participants comprise the SISMA training scheme and the SET tool users' manual ❖ <i>who</i> <ul style="list-style-type: none"> the workshops will be attended by municipal technicians
		(iii) TUTORING
5	contact points & technical assistance networks	<ul style="list-style-type: none"> ❖ <i>objective</i> <ul style="list-style-type: none"> provide support to local decision-makers and technical experts with the aim of fostering their commitment to the proposed solutions in the long term ❖ <i>how</i> <ul style="list-style-type: none"> promotional campaign through MED platform and social media channels ❖ <i>actions</i> <ul style="list-style-type: none"> set up of contact points in the target area establishment of technical assistance networks within the contact points to provide tutoring services for sustaining the diffusion and use of the SISMA Model share the SISMA toolkit through the online web repository

5 Conclusions

The proposed SISMA Strategy provides a framework for taking action at local level and trigger the uptake of the SISMA Model in the long term. Key features of the SISMA Strategy are (i) awareness-raising about, and promotion of, the SISMA Model among stakeholders and beneficiaries, (ii) capacity building to scale up local capacity for understanding and implementing the SISMA Model and (iii) tutoring to support local decision-makers and technical experts and ultimately to boost the use of the SISMA Model. The SISMA Strategy has been developed to address context-relevant challenges and beneficiaries' needs.