

# Mid-term Local Events Report



### Description

This document describes the Mid-term local events of STEPPING project.

### Document details

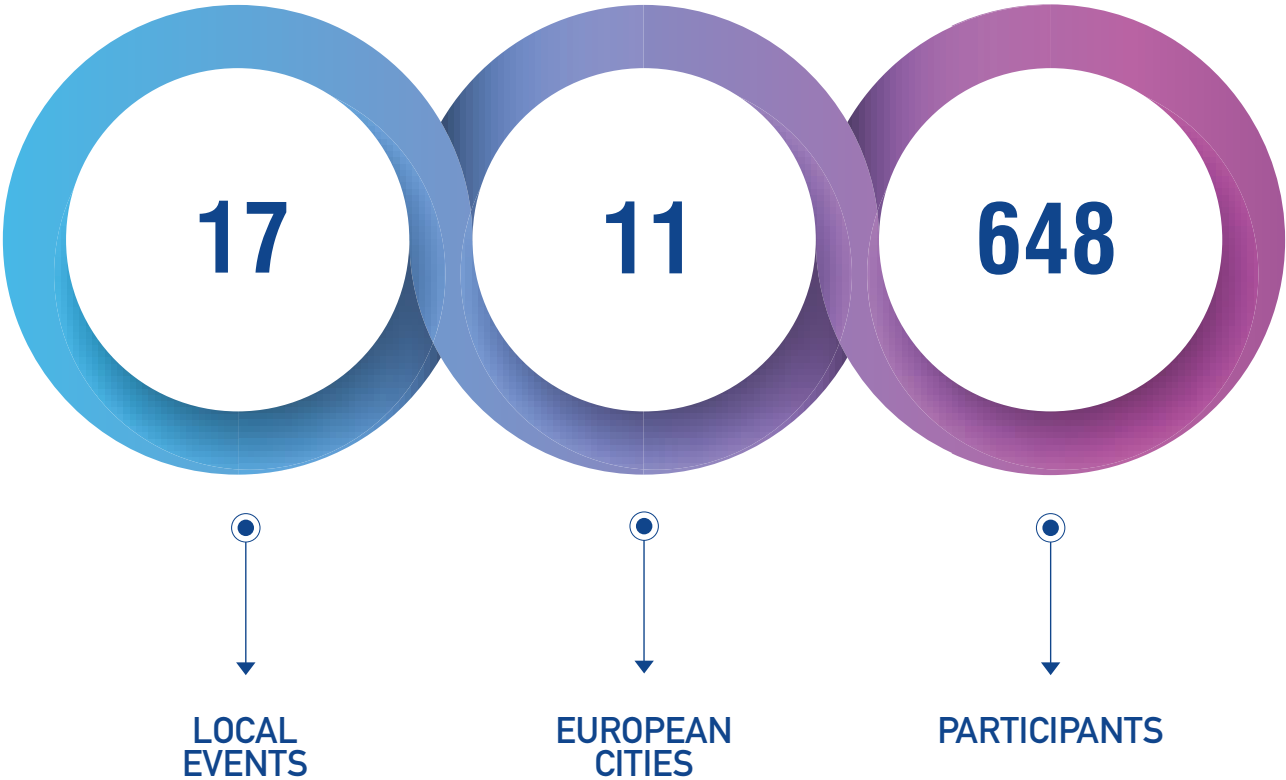
Project	STEPPING Supporting The EPC Public Procurement IN Going-beyond
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### Description

This report is the deliverable of task 2. 3. 1 “Mid-term Local Events report”. The document describes the events each partner organized in order to raise awareness and promote the project activities to relevant stakeholders and the general public. This report documents the first cycle of events occurred between November 2017 and July 2018.



# SUMMARY



5 Workshops    2 Conferences    1 Roundtable session    1 Meeting

# BACKGROUND INFORMATION

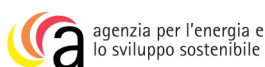
STEPPING project seeks, through cooperation and knowledge sharing, to adapt EPC (Energy Performance Contract); an investment scheme for buildings' energy upgrading, to the specific conditions prevailing in the Mediterranean area. The project includes the development and pilot implementation of investment plans as well as the launch of tenders for EPC implementation in selected public buildings.

In the framework of this scope, STEPPING foresees the organization of two local events for each partner to have the opportunity to raise awareness and promote the project activities to relevant stakeholders and the general public. This report documents the first cycle of events occurred between November 2017 and July 2018.

AEGEA, leader of the Activity 2.3 - STEPPING local events, designed the events' concept and coordinated the necessary steps for producing this report. AEGEA developed and provided all partners with material; templates for agenda, list of participants, assessment questionnaire, event's summary as well as a concept note and check list, ensuring the content and organization of the events. All partners were involved in the collection and sharing of experiences and insights gained during the events, while AEGEA compiled them and produced the final report.

The aim of this report is to document the results and progress achieved thanks to the events organized by each partner. The stakeholders engaged in the events as well as the outcomes reached, and next actions set regarding the approach and realization of EPC investment plans are analysed per partner.

## THE PARTNERS



# AEGEAN ENERGY & ENVIROMENT AGENCY (AEGEA)

aegean energy  
& environment  **agency**  
THE SUPPORTING ORGANISATION FOR GREEK ISLANDS



5 JULY 2018



23 PARTICIPANTS



ROUNDTABLE SESSION

## MID-TERM EVENTS

AEGEA in cooperation with the Energy Policy and Energy Efficiency Department of the Ministry of Environment & Energy and with the support of the Network of Sustainable Greek Islands DAFNI, organized a roundtable discussion on energy upgrading of public buildings through EPC, that took place on 5 July 2018.

The event brought together 23 representatives of national and regional authorities, ESCOs, financial institutions, sectoral agencies and helped pave the way for the elaboration of EPC investment plans in the Greek pilots, in the framework of STEPPING project.

The event was disseminated via the official website of the organizers, press releases, the social media network and web portals related to energy issues.



5 JULY 2018



23 PARTICIPANTS



ROUNDTABLE SESSION

## MAIN OUTCOMES

During the event, a fruitful discussion took place that pointed out not only weaknesses and threats that Greek EPC market should face, but also strengths and opportunities. The bottlenecks of public buildings energy upgrading by using the EPC scheme focus mainly on the lack of financing in combination with the inability of the authorities to manage deep interventions. The facts that there is lack of experienced energy service companies (ESCO) and the duration of an EPC is big, create further uncertainty. Nevertheless, the innovation that can be achieved via bundling EPCs can result in more manageable risk, economies of scale and greater investments. To this direction, the development of the Infrastructure Trust Fund in 2019 will be assistive. Stakeholders also identified the possibility to combine EPC and funds in the context of Partnership Agreement for the Development Framework. Ministry of Environment & Energy announced the development of a new ESCO registry for which only companies with at least one energy service contract or energy performance contract will be eligible. This will contribute in further reducing untrustiness.

Another key point of the round table was to recommend actions that each stakeholder needs to conduct. Highlights include the role of EPC facilitators at local and regional level as well as the support of municipalities in pre-selection of buildings needing energy retrofit.

A follow-up meeting will be soon organized by AEGEA in order to review progress on the matters discussed and coordinate next actions.

# AEGEAN ENERGY & ENVIROMENT AGENCY (AEGEA)

aegean energy & environment  **agency**  
THE SUPPORTING ORGANISATION FOR GREEK ISLANDS



5 JULY 2018



23 PARTICIPANTS



ROUNDTABLE SESSION



**"Energy upgrading of public buildings through Energy Performance Contracts"**  
Roundtable Discussion with stakeholders  
Athens, 5 July 2018

## INTERNAL FACTORS

### CATALYSTS

#### STRENGTHS

- Reliability at all stages of the project: design, maintenance, operation, construction
- Guarantee of energy saving results/ Certification of energy savings
- Dissemination of experience & know-how in municipalities
- Third party financing
- Flexibility in the design, implementation, maintenance & operation of the project
- Boost in construction activities
- EUROSTAT Guideline: for the EPC to be off-balance sheet, 50% of initial capital must be private --> **Opportunity for co-financing projects**

### BARRIERS

#### WEAKNESSES

- Difficulty to allocate specific public revenues which may guarantee the loan payback
- Inability to manage hard interventions (e.g. envelope renovation)
- Inability to intervene in all public buildings, given the lack of public funding
- Need for reliable consumption data & dynamic access to consumer information (lack of smart meters)
- Comprehensive information - public/private partnership
- EPC Duration of at least 8 years, according to EUROSTAT
- Uncertainty in case of public buildings use change

## EXTERNAL FACTORS

### OPPORTUNITIES

- New registry for ESCOs (coming soon)
- Infrastructure Trust Fund (coming in 2019)
- Large building stock
- Public financing available to support blending
- Municipalities: lack of own resources
- Job creation
- Opportunity to undertake operation and maintenance costs

### THREATS

- Legislative framework limiting the duration of EPC (same applies for all public contracts)
- Cautious approach by municipalities and citizens, due to confusion of EPC with a PPP and correlation of latter with mismanagement on behalf of the public sector
- Proper financial risk assessment
- Assurance of both parties (i.e. Germany)

**STEP UP TO ENERGY EFFICIENCY**

# PIEMONTE REGION (REG-PIE) IN COOPERATION WITH ENVIRONMENT PARK SPA (ENVIPARK)



REGIONE  
PIEMONTE



ENVIRONMENT  
PARK Parco Scientifico  
Tecnologico per l'Ambiente



27,29,30 NOVEMBER 2017  
5 DECEMBER 2017



85 PARTICIPANTS



4 WORKSHOPS

## MID-TERM EVENTS

The Piemonte Region in cooperation with Environment Park SPA organized a free workshop addressed to Municipalities. To facilitate the participation of municipalities of such a large territory as Piemonte is, the workshop took place in four venues: on 27th November 2017 in Varallo, on 29th November 2017 in Alessandria, on 30th November 2017 in Cuneo and on 5th December in Novara.

The workshops brought together 85 participants, including representatives from Local Authorities, ESCOs and energy agencies.

All municipalities of Piemonte territory were invited with a direct massive mailing and telephone action. The event was also disseminated via the regional website, official social network and the Association of municipalities.



# PIEMONTE REGION (REG-PIE) IN COOPERATION WITH ENVIRONMENT PARK SPA (ENVIPARK)



 27,29,30 NOVEMBER 2017  
5 DECEMBER 2017  
 85 PARTICIPANTS  
 4 WORKSHOPS

## MAIN OUTCOMES

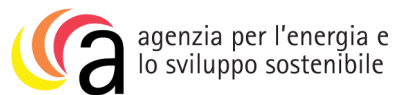
The event focused on EPC and energy management in the framework of STEPPING and PEACE\_Alps projects. During the workshop, the option of public facilities retrofitting by using the EPC was presented. Moreover, to support Municipalities in the activities of auditing and analysis of energy consumption of public utilities, buildings and street lighting, foreseen in the monitoring phase of SECAPs, the Piemonte Region presented the software ENERCLOUD+, created by the Region itself in collaboration with CSI Piemonte.

The turnout of participants was good, and the event was fruitful both for municipalities and for Piemonte Region staff who could collect interesting questions and suggestions.

Piemonte Region will support the municipalities use the energy management tool, ENERCLOUD+ to monitor and analyze, within a common framework, the energy consumption trends in three (3) public buildings and five (5) street lighting systems. This service will be offered free of charge to all the Municipalities.

The event and STEPPING project was disseminated via press releases and local media, both on and offline.

# ENERGY AND SUSTAINABLE DEVELOPMENT AGENCY OF MODENA (AESS)



agenzia per l'energia e  
lo sviluppo sostenibile



**28 NOVEMBER 2017**



**84 PARTICIPANTS**



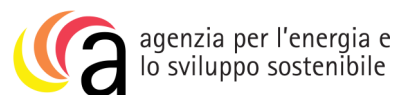
**WORKSHOPS**

## MID-TERM EVENTS

In the framework of the “Bio-architecture and building automation Week” that took place on 28th November 2017, AESS organized a workshop, with the support of STEPPING project and the NEIGHBOURHOOD ECONOMICS project.

The event was attended by 84 important stakeholders, including representatives from ESCOs, Public Authorities at regional and national level and financial institutions.

# ENERGY AND SUSTAINABLE DEVELOPMENT AGENCY OF MODENA (AESS)



28 NOVEMBER 2017



84 PARTICIPANTS



WORKSHOPS

## MAIN OUTCOMES

During the workshop, Silvio De Nigris – STEPPING Lead Partner – presented STEPPING project, its main goals and activities. Updates on the legislation were provided, while ESCOs and regional and national Public Authorities shared their experiences and practices in the field.

The workshop led to a general better knowledge over the EPC market at national level. Participants shared their insights and experience on EPC best practices. New legislation was also analyzed as well as available funds to promote EPC, especially in the public sector, such as EEEF – European Energy Efficiency Fund, were identified.

# BSC, BUSINESS SUPPORT CENTRE LTD, KRANJ; REGIONAL DEVELOPMENT AGENCY GORENJSKA (BSC)



16 FEBRUARY 2018



113 PARTICIPANTS



CONGRESS

## MID-TERM EVENTS

In the framework of the Association of Slovenian-Liechtenstein Friendship, a congress entitled Energy and financial independency was held on 16th February 2018. At the event, the Regional Development Agency of Gorenjska, BSC Kranj participated representing the PEACE\_Alps and STEPPING, projects both related to energy efficiency.

The congress was attended by 113 stake holders representing ESCOs, Local Energy agencies, Municipalities as well as experts in the field of energy efficiency. The event offered an opportunity for networking and strengthening cooperation between Slovene and Liechtenstein enterprises and institutions in the field of energy and finance.

# BSC, BUSINESS SUPPORT CENTRE LTD, KRANJ; REGIONAL DEVELOPMENT AGENCY GORENJSKA (BSC)



16 FEBRUARY 2018



113 PARTICIPANTS



CONGRESS

## MAIN OUTCOMES

During the presentation of PEACE\_Alps and STEPPING projects, possibilities of energy renovations in public buildings as well as private homes were explored. At this point, Energy Atlas tool was also presented, a database with single methodology and 4 modules (e-planning, e-literacy, e-cooperation, e-indicators), enabling the user to determine the best renovation solution applicable to his / her building. Part of the event was dedicated to financial aspects, analyzing both traditional and modern approaches, while the participants had the opportunity to attend to networking sessions.



21 FEBRUARY 2018  
7 MARCH 2018  
3 MAY 2018



120 PARTICIPANTS



3 EVENTS

## MID-TERM EVENTS

Huelva County Council invited municipalities to a meeting about the EPC bundle and the procedure to realize it on 21st February 2018. The municipalities invited were previously contacted, so the viability of an EPC bundle in some of their municipal buildings (Primary Schools) had been analysed prior to the event. In addition to this, Huelva County Council disseminated STEPPING project, its actions and objectives through two events on 7th March and 3rd May 2018.

The first meeting was attended by 40 representatives of 19 municipalities. Participants included politicians from municipalities - mayors and town councillors -, municipal technicians, Huelva County Council Deputies and technicians and the manager of Huelva Energy Agency. The second and third dissemination and raising awareness events were attended by approximately 40 stakeholders each, representing ESCOs, Engineering Companies, Financial Institutions, Public Administrations, Energy Agencies and Universities.



21 FEBRUARY 2018  
7 MARCH 2018  
3 MAY 2018



120 PARTICIPANTS



3 EVENTS

## MAIN OUTCOMES

During the first event, Huelva County Council presented the STEPPING project. An interesting discussion followed focusing on the implications of the EPC bundle and the ways of implementation. In the debate, political representatives, municipal secretaries, controllers, Huelva Energy Agency and municipal technicians were involved. The discussions resulted in determining the necessary steps for carrying out the EPC bundle:

- The municipalities should formalize an Agreement of Accession to STEPPING project, where their interest in participating in the project is declared.
- An Investment Plan (including Energy Audit and economic and financial analysis) will be carried out in each municipality building (previously mayor municipality had signed the Agreement of Accession to STEPPING project). Huelva County Council should develop tender models of this Investment Plan and award the contract.
- A Specific Agreement would be signed between interested municipalities (which Investment Plan is viable) and Huelva County Council, where the obligations in the EPC bundle of each entity will be regulated. The Investment Plan results will be added as an Annex to this Specific Agreement.



21 FEBRUARY 2018  
7 MARCH 2018  
3 MAY 2018



120 PARTICIPANTS



3 EVENTS

## MAIN OUTCOMES

The second event was organized in the context of “Financing Energy Efficiency in Spain through European Initiatives and Programs” event under the ENERINVEST project. Its objective was to raise awareness of the current situation in Spain and evolution of initiatives and funding programs aimed at improving energy efficiency, as well as to leverage private financing. Presenting STEPPING project gave the opportunity to identify and take advantage of the synergies between both projects as well as disseminate STEPPING to the public.

Similar to the second event, the third one entitled "ACTIONS OF ENERGY AND SUSTAINABILITY IN MUNICIPALITIES OF THE PROVINCE OF HUELVA: EUROPEAN PROJECTS" contributed into exploring synergies among European projects focusing on reducing energy consumption and enhancing sustainability.



# MALTA INTELLIGENT ENERGY MANAGEMENT AGENCY (MIEMA)



19 JANUARY 2018  
25 MAY 2018



30 PARTICIPANTS



2 WORKSHOPS

## MID-TERM EVENTS

Malta Intelligent Energy Management Agency organized a 1-day training Workshop “New Finance Alliance Retreat” in the framework of the NEW FINANCE project, which, is co-funded under the Interreg MED programme. MIEMA had the opportunity to present STEPPING project, which together with NEWFINANCE fall under the thematic area “Efficient Buildings”. The aim of the event was to provide training to local authorities on financial mechanisms for building's energy refurbishment. In May 2018, MIEMA organized one more training workshop on these energy renovation related projects.

The workshop “New Finance Alliance Retreat” counted with the participation of representatives from Maltese Local Councils and the Ministry for Employment and Education, while the second event was attended by 29 participants.

# MALTA INTELLIGENT ENERGY MANAGEMENT AGENCY (MIEMA)



19 JANUARY 2018  
25 MAY 2018



30 PARTICIPANTS



2 WORKSHOPS

## MAIN OUTCOMES

During the workshop “New Finance Alliance Retreat”, Eng. Diane Cassar (MIEMA) explained the different options for financial models to be applied to Energy Refurbishment and RES projects. Eng. Cassar also presented an analysis on the best practices collection, compiled specifically for the New Finance project. Arch. Erika Massa (MIEMA) presented STEPPING Project and the models for EPC investment plans. The foreseen activities for the pilot projects and the draft of the investment plan were also introduced during the session. The workshop was concluded with a round table and discussion with the stakeholders, who showed great interest in EPC models, STEPPING project and pilot activities.

The 2nd event included a training session entitled “Energy Performance Contracting for Energy Renovation Projects in Public Buildings”, delivered by an international expert and Energy Manager. Maltese and Gozitan public entities, as well as, local stakeholders participated in this workshop on new financing models for energy refurbishment projects in public buildings. A roundtable of discussion followed involving all the attendees.

In the coming months, MIEMA is planning to organize more events on the same thematic area.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY IN AUVERGNE RHONE-ALPES (AURA - EE)



**Auvergne  
Rhône-Alpes**  
Énergie Environnement



**27 FEBRUARY 2018  
22 NOVEMBER 2017**



**75+ PARTICIPANTS**



**CONFERENCE, STEERING  
COMMITTEE MEETING**

## MID-TERM EVENTS

In the context of the European STEPPING project on Energy Performance Contracts (EPC), AURA-EE, with the support of Europe, the Regional council and the French Environment & Energy Management Agency - ADEME and in partnership with the State regional directorate for environment, planning and housing - DREAL, organized a conference on the pooling of resources for the energy renovation of public buildings on 27th February 2018.

Prior to this, on November 22nd 2017, a steering committee had met to identify the applicability and effectiveness of EPC scheme for small municipalities.

The steering committee consisted of representatives from SMEs, policy makers, financial institutions, institutional bodies and engineering companies. The conference was attended by 76 stakeholders in total. Participants included representatives from 12 municipalities, 6 ESCOs, 13 engineering companies, 1 institution, and 10 associations, SME and energy network companies.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY IN AUVERGNE RHONE-ALPES (AURA - EE)



**Auvergne  
Rhône-Alpes**  
Énergie Environnement



**27 FEBRUARY 2018  
22 NOVEMBER 2017**



**75+ PARTICIPANTS**



**CONFERENCE, STEERING  
COMMITTEE MEETING**

## MAIN OUTCOMES

During the steering committee meetings, all participating stakeholders agreed that EPC can be developed and offer cost - saving solutions and mass renovation of the current building stock in the case of small municipalities, since EPC addresses their lack of financial resources and competence (engineering, outsourcing and guarantee results).

The key topic addressed during the conference was about the tools and approaches already used successfully at different territorial levels. Representatives, experienced in EPC model, from different territories shared their technical, legal and financial approaches for pooling resources in order to multiply the energy renovation of public service buildings owned by Auvergne-Rhône-Alpes territorial authorities. They gave their feedback regarding their work progress pointing out the challenges they face as well.

More specifically, the following remarks were made:

- At regional level,
  - EPC projects should be of a certain amount of investment (> 1 M €) and preferably involve low number of stakeholders in order to bring results.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY IN AUVERGNE RHONE-ALPES (AURA - EE)



**Auvergne  
Rhône-Alpes**  
Énergie Environnement



**27 FEBRUARY 2018  
22 NOVEMBER 2017**



**75+ PARTICIPANTS**



**CONFERENCE, STEERING  
COMMITTEE MEETING**

## MAIN OUTCOMES

- At municipal level
  - One of the main obstacle that municipalities should overcome is about lack of funding necessary for initiating the retrofitting interventions.
  - Both legal and financial leverage mechanisms should be implemented so as to multiply EPC projects throughout the region. A promising starting point is that there are already solutions available for triggering the renovation of heritage properties.
  - The models of 1) EPCI as pilot of a patrimony renovation plan, 2) the grouping of orders between municipalities, 3) the development of SPL, GIP (public interest group) and / or SEM (semi-public company) can enable the execution of contracts.
  - Regarding third-party financing, only PPP (public-private partnerships) and / or SPL / GIP / SEM schemes are possible in case of large projects for profitability reasons, while in case of smaller projects bank loans are the only solution.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY IN AUVERGNE RHONE-ALPES (AURA - EE)



**Auvergne  
Rhône-Alpes**  
Énergie Environnement



**27 FEBRUARY 2018  
22 NOVEMBER 2017**



**75+ PARTICIPANTS**



**CONFERENCE, STEERING  
COMMITTEE MEETING**

Furthermore, considering the forthcoming “National Building Renovation Plan”, which will be presented by the Minister in the end of March, ADEME underlined the importance of:

- encouraging the implementation of multi-year investment patrimony strategies (support for assistance and engineering),
- developing regular and in-depth knowledge exchanges, experiences sharing (such as regional conferences organized on EPC, energy savings, etc.),
- having a real "Project" toolbox (model contracts, specifications, preliminary studies, clause lists, etc.) through a national resource website,
- Continuing developing “field tools”, such as the shared energy council, or innovative initiatives, such as "interacting".

The conference concluded that the actions undertaken by the territories in the analysis of their building heritage (monitoring of consumption and knowledge of buildings through the CEP, energy audit campaigns, cross - cutting analyses by type of building or use, setting up shared tools such as operating contracts, EPCs, etc.) should be encouraged further. These tools and models will be necessary for the deployment of projects, when the supporting schemes systems and funding tools will be adapted, in particular within the framework of the new National Building Renovation Plan mentioned by ADEME, which will provide the means to boost EPC and the pooling of resources.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY FROM NORTH ALENTEJO (AREANATEJO)



13 DECEMBER 2017



70 PARTICIPANTS



WORKSHOP

## MID-TERM EVENTS

AREANATeJo organized the Workshop "Energy Efficiency as a Tool for Sustainable Development" on 13rd December 2017. The event took place in the context of STEPPING and EduFootprint projects, financed by the INTERREG-MED Program.

The event was attended by more than 70 representatives from municipalities, inter - municipal communities, companies (SME) and several reference entities at local and national level.

# REGIONAL ENERGY AND ENVIRONMENT AGENCY FROM NORTH ALENTEJO (AREANATEJO)



13 DECEMBER 2017



70 PARTICIPANTS



WORKSHOP

## MAIN OUTCOMES

The main issues addressed were related to the implementation of Energy Performance Contracts and energy efficiency in municipal and school buildings.

During the workshop, STEPPING Project was presented, with all the work that has been developed by the partners and by AREANATejo in its intervention area. The legal framework of Energy Performance Contracts was discussed and some case studies of implementing EPC in the private sector were presented. Special emphasis was placed on the monitoring systems of energy consumption, already installed in 12 buildings in the North Alentejo, and the web platform to monitor these consumptions. A panel dedicated to the presentation of energy efficiency projects in municipal and school buildings also took place.

AREANATejo will continue to disseminate the tasks carried out under STEPPING keeping in touch with all local, regional and national stakeholders.



# CONCLUSION



Project co-financed by the European  
Regional Development Fund

Among partners' countries there are different progress levels regarding their EPC market development and penetration, which is reflected to the events organized as well. In regions; Huelva, Modena, North Alentejo, Piedmont and Rhône-Alpes, where EPC projects have been already executed successfully, public authorities and their staff were involved in the events and showed their interest in STEPPING activities. Moreover, most of these partners; AURA – EE, REG-PIE and AESS, organized multiple events resulting in reaching out more stakeholders.

On the other side, the partners AEGEA, BSC and MIEMA, representing regions, where EPC framework conditions haven't been established yet or are now in the development phase, involved in the events stakeholders who can influence all aspects (regulatory, financial, etc.) necessary for triggering their national EPC market. Also, the timing of the events was affected by the local conditions. In countries where EPC market is at infant stage, more time was needed for creating the appropriate fundamentals, so the events lead in concrete results.

Overall, it can be said that all events fulfilled their objectives to raise awareness about EPC scheme and ensure the necessary commitment that can lead to successful development and pilot implementation of investment plans as well as the launch of tenders for EPC implementation in selected public buildings.