

# Peer Powered Cities and Regions

## Deliverable 2.4: Summary of peer to peer learning objectives for all trainees (draft)

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**Peer Powered Cities and Regions**

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<b>Deliverable name:</b>	<b>Summary of peer to peer learning objectives for all trainees (draft)</b>
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## Preface

PROSPECT aims to create an easy and replicable peer to peer learning programme for regional and local authorities to learn with and from each other on how to finance and implement their sustainable energy and climate action plans using innovative schemes. The learning programme has five (5) thematic modules, namely public buildings, private buildings, public lighting, transport, and cross-sectoral in which regional and local authorities, who can serve as mentors or mentees, will learn in two ways: through peer mentoring and study visits. The learning programme has three learning cycles; each learning cycle offers 5 peer mentoring and 5 study visit programmes.

## Who We Are

No	Participant Name	Short Name	Country Code	Logo
1	Institute for Housing and Urban Development Studies BV	IHS	NL	
2	The European association of local authorities in energy transition	ENERGY CITIES	FR	
3	European Federation of Agencies and Regions for Energy and the Environment	FEDARENE	BE	
4	Institute for European Energy and Climate Policy Stichting	IEECP	NL	
5	EUROCITIES ASBL	EUROCITIES	BE	
6	University of Piraeus Research Center	UPRC	GR	
7	Climate-KIC GmbH	CLIMATE-KIC GMBH	DE	
8	Ober Oesterreich Energiesparverband	ESV	AT	
9	Agencia Regional de Energia para os Concelhos do Barreiro, Moita e Montijo	S.ENERGIA	PT	
10	Mesto Trnava	TRNAVA	SK	



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## Executive Summary

For the PROSPECT learning programme to be successful and satisfactory for all the involved mentors and mentees, the PROSPECT consortium will **identify and achieve their learning objectives**. This is a crucial pre-requisite for a successful match-making process (WP3) and the future replication of the innovative financing schemes and the implementation of sustainable energy and climate actions by the participants.

In the framework of WP2, Energy Cities is responsible for summarising the learning objectives of all participants to the learning programme. This draft deliverable is a **summary of the learning objectives of three partners** – ESV regional energy agency (Austria), the city of Trnava (Slovakia) and S.Energia energy agency (Portugal) – who have participated in a ‘test phase’ engagement campaign.

In order to identify learning objectives of the participants, ENC has developed **two application forms** – for mentors and mentees – which include specific questions about the mentees’ **learning objectives** and mentors’ ambitions to share their expertise and learn from mentees. The application forms have been **co-designed and tested** by the three partner public authorities.

The summary of the mentors’ and mentees’ learning objectives:

- **ESV regional energy agency** wishes to share its expertise related to the facilitation of EPC implementation, technical experience in street lighting and energy efficiency projects and its practical experience with the implementation of a long-term support programme. ESV has an ‘expert level’ (C) in one financing scheme (EPC) and ‘intermediary level’ (B) in two financing schemes (third party financing and citizen finance).
- **The city of Trnava** has been working on two projects (preparatory phase) in the sector of public buildings and public lighting. The city wishes to learn about Energy Performance Contracting (EPC). This matches perfectly with the expertise that ESV can offer.
- **S. Energia** has been working on two projects (development phase). In the sector of public buildings, the priority is to learn about a **revolving fund / investment fund and citizen finance**. In the sector of public lighting, the priority is to learn about EPC.

Unfortunately, ESV cannot offer expertise in the field of revolving/investment funds. However, it can offer higher expertise than S.Energia in three other financing schemes:

- EPC: C2 > A2
- Citizen finance: B2 > A1
- Third party financing for public lighting projects: B1 > A1

**The conclusion** is that Trnava can be matched with ESV who can help the city meet all its learning objectives for both priority projects. S.Energia can be matched with ESV who can share expertise on all requested financing schemes except for the priority n°1 financing scheme (revolving/investment fund). ESV can organise a study visit involving both mentees.

# 1 INTRODUCTION

## 1.1 Aim and objectives

For the PROSPECT learning programme to be successful and satisfactory for all the involved mentors and mentees, the PROSPECT consortium will **identify and achieve their learning objectives**. This is a crucial pre-requisite for a successful match-making process (WP3) and the future replication of the innovative financing schemes and the implementation of sustainable energy and climate actions by the participants.

## 1.2 Methodology

First of all, a **needs assessment (D2.1)** has been carried out to identify public authorities' needs, knowledge gaps and barriers for sustainable energy and climate financing. The results of this assessment set the basis for the development of the learning programme.

The needs assessment survey will be ongoing through the duration of the project. Its objective is to sense tendencies and **evolution of the barriers and needs** and a consequent integration of relevant content to the learning programme. Thus, the programme will be up to date and always responding to mentors and mentees' actual needs.

Secondly, the consortium will identify **personalised learning objectives** of each mentee and mentor in the learning programme.

This will be done via the online **application forms** (see ANNEX) - one for mentees and one for mentors - that aim at identifying learning objectives / ambitions related to financing and implementation of a specific sustainable energy and climate project.

These learning objectives will allow PROSPECT partners to **match** mentees with relevant mentors.

Last but not least, once the **matching process is finalised** and mentors and mentees are enrolled in the learning programme, their learning objectives and ambitions will be even more detailed, individualised and customised during the orientation session (see D3.3 - Structure of the learning programme). Moreover, they will be formalised in a **peer learning agreement** which will include:

- Summary of peer learning objectives
- Target learning outcomes to be achieved
- Description of learning activities
- Roles and responsibilities of multiple parties, including the learning facilitator
- Duration of the learning program
- Confidentiality agreement

This draft report is a **summary of peer learning objectives** expressed by the project partners- **TRNAVA, S.ENERGIA and ESV** – via the application forms. This was part of a 'test phase' of the engagement campaign. All three partners actively shaped the content and structure of the application forms, they tested them online and provided suggestions for improvement.

## 2 SUMMARY OF LEARNING OBJECTIVES

### 2.1 ESV

#### ESV applied to the learning programme as a mentor.

BASIC INFO ABOUT THE CITY / REGION	
Organisation	OÖ Energiesparverband (ESV) - the regional energy agency of Oberösterreich/Upper Austria, Austria
Representing	Upper Austria (1.4 million inhabitants)
Region is a Covenant of Mayors coordinator	No
Region has a SEAP/SECAP/long-term energy & climate strategy or action plan	Yes
Region is coordinating and supporting cities in its territory (action plan development)	Yes
Action plan stage	Implementation / monitoring
Vision and objectives of the action plan	<p><b>For 2020</b>, the following targets apply:</p> <ul style="list-style-type: none"> <li>○ Increasing the share of renewables for electricity generation in Upper Austria to 80 - 97 % by 2030</li> <li>○ Continuous increase in energy efficiency by 1.5- 2 % per year</li> <li>○ Reduction of greenhouse gas emissions by 16 % until 2020 (compared to 2005)</li> <li>○ Reduction of energy intensity (greenhouse gas emissions / gross domestic product, basis 2014) from 25 to 33 % by 2030 and from 70 to 90 % by 2050</li> </ul>
Region developed a SUMP	Yes
SUMP stage	<ul style="list-style-type: none"> <li>• Partly development stage</li> <li>• Partly implementation &amp; monitoring stage</li> </ul>
EXPERTISE	
PROJECT 1	
Sector	<ul style="list-style-type: none"> <li>• Public buildings</li> <li>• Public lighting</li> </ul>
Project title	Energy performance contracting programme in Upper Austria Example: Renovation of public street lighting
Development phase	Financing - implementation – operation phase
Description	In 1998, the region of Upper Austria pioneered a support programme for Energy Performance Contracting (EPC). The programme is implemented by the regional administration in cooperation with ESV. The support programme is a combination of financial support and facilitation services. ESV is responsible for the facilitation of the programme. EPC as an instrument is therefore quite well-known by the municipalities in Upper Austria. Since then, more than 200 EPC projects were implemented in different fields, more than a half by municipalities. Due to the regional support programme, there are more than 15 ESCOs that offer EPC-related services in Upper Austria, 6 of them are active in the field of street lighting.

<b>Innovative financing mechanism ESV have used for this project &amp; expertise level</b>	<ul style="list-style-type: none"> <li>• Energy Performance Contracting (EPC) &gt; C2</li> <li>• Third party financing (e.g. loans from financial institutions, private investors) &gt; B1</li> <li>• Soft loans for homeowners of residential buildings &gt; B2</li> <li>• Citizens finance (cooperatives/crowdfunding) &gt; B2</li> </ul>
<b>Key success factors &amp; replication potential of the project</b>	<ul style="list-style-type: none"> <li>• EPC can take many forms (depending on the legal, economic and social context of each region and project), however core aspects for EPC include: <ul style="list-style-type: none"> <li>○ Contractually guaranteed savings &amp; financial consequences</li> <li>○ Other aspects can vary greatly</li> </ul> </li> <li>• It is all about trust &amp; knowledge: <ul style="list-style-type: none"> <li>○ High interest, low knowledge, "explain, explain, explain"</li> <li>○ Work very closely with individual municipalities and ESCOs</li> </ul> </li> <li>• Quality is king! <ul style="list-style-type: none"> <li>○ Good project preparation is crucial</li> <li>○ Fewer, but convincing projects, are better in early market phases</li> <li>○ The EPC process supports solutions with higher-level technical quality</li> <li>○ Involving citizens creates an understanding that projects are not only about saving money or energy but also about their security and quality</li> </ul> </li> </ul>
<b>Summary of personal skills and expertise to be shared with peers</b>	<ol style="list-style-type: none"> <li>1. Facilitation of <b>EPC implementation</b></li> <li>2. Technical experience in <b>street lighting and energy efficiency projects</b></li> <li>3. Practical experience from the implementation of a long-term <b>support programme</b></li> </ol>
<b>Preferred form of peer learning</b>	<b>Study visit</b>

### Upper Austria / ESV: activities and achievements

The OÖ Energiesparverband (ESV) is the regional energy agency of Oberösterreich/Upper Austria, a highly industrialised region in the Northern part of Austria.

Since the mid-90s, Upper Austria has prioritised energy efficiency and renewable energy. Renewable energy currently supplies 40% of the total final energy demand. The high share of renewable energy was achieved through comprehensive regional energy action plans. For 2030, Upper Austria has set the target to meet 100% of its space heating demand and electricity from renewable energy sources.

The ESV is the central sustainable energy institution in Upper Austria and is responsible for the implementation of most programmes of the energy action plan.

Its' main activities are the provision of energy advice to private households, public bodies and companies (around 10,000 advice face-to-face-sessions/year), media campaigns, training courses (the ESV operates the "Energy Academy") and publications for different target groups. This also includes the organisation of meetings and events, e.g. the international conference World Sustainable Energy Days, one of the largest annual European conferences on sustainable energy (more than 10,000 participants from over 100 countries in the last years).

ESV also manages the region's sustainable energy business cluster (the Oekoenergie-Cluster, [www.oec-en.at](http://www.oec-en.at)) with more than 160 partners, which employ more than 9,400 staff and a total turn-over of 2.3 billion Euro.

On behalf of the regional government, ESV is responsible for the management of the Upper Austrian sustainable buildings programme for new and retrofitting of domestic buildings. Since 1993, for more than 100,000 buildings an energy performance indicator was calculated, an energy performance certificate issued respectively checked and face-to-face advice sessions were carried out. ESV proactively informs end consumers on energy issues relevant to them, such a new technologies, tips for saving energy in their homes or information on funding programmes available for energy and building-related investments.

This includes also the development of publications on a range of topics of interest to private households. These publications are made available on ESV's website but also on relevant trade shows, on the regional government information centre or in many municipalities. Also campaigns focusing on specific subjects or target groups are implemented.

The agency provides a number of services to municipalities, including support in tender procedures for new buildings/installations and local energy strategies. Additionally the regional programme "EGEM", which is managed by ESV, supports municipalities in the conceptualisation, the preparation and the implementation of their local energy strategies. The programme is well established in Upper Austria. Of the 444 municipalities in the region, more than 177 municipalities have already joined the programme.

## 2.2 Trnava

### The city of Trnava applied to the learning programme as a mentee

BASIC INFO ABOUT THE CITY / REGION	
Organisation	City of Trnava, Slovakia
Representing	City of Trnava (65,000 inhabitants)
City is a Covenant of Mayors signatory	Yes
City has a SEAP/SECAP/long-term energy & climate strategy or action plan	No
Action plan stage	N/A
Vision and objectives of the action plan	N/A
City developed a SUMP	No
SUMP stage	N/A
EXPERTISE	
Experience with the innovative financing schemes	No experience
PROJECT 1	
Sector	Public buildings
Project title	EPC buildings
Project cycle phase	Preparatory phase (project is included in the SECAP/SUMP but has not started yet)
Description	<b>Project objective:</b> Reduce energy consumption of certain number of chosen public buildings, mainly schools and kindergartens by at least 50%.

	<p><b>Measures:</b> The city wants to prepare a roadmap of measures to be planned, e.g. first administrative measures, then quick win tech measures, like cleaning pipelines, heat control.</p> <p><b>Estimated budget:</b> self-funding - covered by savings, eventually one of innovative financial instruments could be applied.</p>
<b>Role in the project</b>	Coordinator
<b>Difficulties to finance and implement the project</b>	Too early to say
<b>Innovative financing schemes you are interested in relation to this project &gt; Expertise level &gt; Priority</b>	<ul style="list-style-type: none"> <li>• <b>Energy Performance Contracting (EPC) &gt; A2</b></li> <li>• Third party financing (e.g. loans from financial institutions, private investors) &gt; A1</li> <li>• Soft loans for homeowners of residential buildings &gt; A1</li> <li>• Revolving/investment funds &gt; A1</li> <li>• Citizens finance (cooperatives/crowdfunding) &gt; A2</li> <li>• Green bonds &gt; A1</li> </ul> <p><i>Financing schemes not prioritised!</i></p>
<b>Summary of personal learning objectives</b>	<ol style="list-style-type: none"> <li>1. Understanding the <b>EPC mechanism</b> and its details.</li> <li>2. Learn how to combine self funding part of financial instruments</li> <li>3. Learn how to apply flexible savings depending on the itinerary of saving measures, e.g. if some measures (photovoltaics) are done in the year 5, when the expected efficiency o PHVe will be much higher than today.</li> </ol>
<b>PROJECT 2</b>	
<b>Sector</b>	Public lighting
<b>Project title</b>	Street lighting
<b>Project cycle phase</b>	Preparatory phase (project is included in the SECAP/SUMP but has not started yet)
<b>Description</b>	<p><b>Objective:</b> reduce street lighting annual costs by 50%</p> <p><b>Measures:</b> refurbish old street lights, where necessary pillars and cables in Trnava within a year</p> <p><b>Estimated budget:</b> 7 million EUR</p> <p><b>Type of financing considered:</b> to be discussed, but partially covered by measures</p>
<b>Role in the project</b>	Coordinator
<b>Difficulties to finance and implement the project</b>	I expect messy priorities from different members of a city council. EPC does not affect the budget, therefore it should be easier to be approved.
<b>Innovative financing schemes you are interested in relation to this project &gt; Expertise level &gt; Priority</b>	<ul style="list-style-type: none"> <li>• <b>Energy Performance Contracting (EPC) &gt; A2</b></li> <li>• Third party financing (e.g. loans from financial institutions, private investors) &gt; A1</li> <li>• Soft loans for homeowners of residential buildings &gt; A1</li> <li>• Revolving/investment funds &gt; A1</li> <li>• Citizens finance (cooperatives/crowdfunding) &gt; A1</li> <li>• Green bonds &gt; A1</li> </ul> <p><i>Financing schemes not prioritised!</i></p>
<b>Summary of personal learning objectives</b>	Learn whether there are cases, where <b>EPC</b> affects the municipal budget or it is always budget-neutral

## 2.3 S.Energia

### S.Energia applied to the learning programme as a mentee

BASIC INFO ABOUT THE CITY / REGION	
Organisation	S.Energia, Portugal
Representing	Municipalities of Barreiro, Moita, Montijo (200,000 inhabitants)
City is a Covenant of Mayors signatory	Yes
City has a SEAP/SECAP/long-term energy & climate strategy or action plan	Yes
Action plan stage	Implementation and monitoring stage
Vision and objectives of the action plan	<i>No answer</i>
City developed a SUMP	<i>No answer</i>
SUMP stage	<i>No answer</i>
EXPERTISE	
Experience with the innovative financing schemes > sector	Third party financing (e.g. loans from financial institutions, private investors) <ul style="list-style-type: none"> <li>- Public buildings: Support one of the municipalities in the definition of leasing pilot project for improving the efficiency of public lighting</li> </ul>
PROJECT 1	
Sector	Public buildings
Project title	More Efficient Local Government Buildings
Project cycle phase	Development phase (Feasibility studies, energy audits, market gap analysis, project initial financial appraisal)
Description	<p><b>Project objective:</b> Reduce energy consumption by at least 15% with 40% renewable energy locally produced</p> <p><b>Measures:</b> Global renovation incl. insulation of building envelope, replacement of heating system, integration of RES production and smart metering.</p> <p><b>Estimated budget:</b> 500,000 EUR</p>
Role in the project	Support in defining solutions and search for funding options for the solutions adopted
Difficulties to finance and implement the project	The difficulties in achieving <b>overall funding</b> for all the measures in this project led to the various actions being funded and implemented at different times and with different sources and funding schemes. So there are different difficulties, according to the expected payback periods for each action. However, there are some legal doubts about the model of contracting services for renewable energy, through contracts similar to energy performance.
Innovative financing schemes you are interested in relation to this project > Expertise level > Priority	<ul style="list-style-type: none"> <li>• Revolving/investment funds &gt; A1 &gt; Priority 1</li> <li>• Citizens finance (cooperatives/crowdfunding) &gt; A1 &gt; Priority 2</li> <li>• Energy Performance Contracting (EPC) &gt; A1 &gt; Priority 3</li> </ul>
Summary of personal learning objectives	<ol style="list-style-type: none"> <li>1. Learn how to implement a revolving fund for energy efficiency in the municipalities.</li> <li>2. Learn how to develop an energy efficiency financing process for example by citizen financing for energy efficiency or renewable energy production in public</li> </ol>

	buildings, and pass this model to other public and private organizations.
<b>PROJECT 2</b>	
<b>Sector</b>	Public lighting
<b>Project title</b>	Energy Efficiency in Public Lighting
<b>Project cycle phase</b>	Development phase (Feasibility studies, energy audits, market gap analysis, project initial financial appraisal)
<b>Description</b>	<p><b>Objective:</b> 60% Increased energy efficiency in public lighting through the adoption of appropriate lighting levels and more efficient equipment</p> <p><b>Measures:</b> Definition of appropriate lighting levels, daily profile of lighting and control system. Replacement of obsolete equipment by LED and introduction of centralized management system.</p> <p><b>Estimated budget:</b> <i>no answer</i></p> <p><b>Type of financing considered:</b> <i>no answer</i></p>
<b>Role in the project</b>	Support in defining solutions and search for funding options for the solutions adopted
<b>Difficulties to finance and implement the project</b>	The Portuguese municipalities have a concession contract for public lighting, where several parameters are defined according to the technology used and not the levels of illumination. Therefore, without a thorough review of this contract, and without the consent of the concessionaire, changes in public lighting imply a high financial risk for municipalities.
<b>Innovative financing schemes you are interested in relation to this project &gt; Expertise level &gt; Priority</b>	<ul style="list-style-type: none"> <li>• Energy Performance Contracting (EPC) &gt; A1 &gt; Priority 1</li> </ul>
<b>Summary of personal learning objectives</b>	Learn how to implement an <b>EPC model for public lightning</b> considering the establishment of the based scenario and information about the most difficult barriers/issues and ways of solving them.

### 3 CONCLUSIONS AND RECOMMENDATIONS FOR THE LEARNING PROGRAMME

PROJECT 1	Trnava	S.Energia	ESV
Sector	<b>Public buildings</b>	<b>Public buildings</b>	<b>Public buildings</b>
Project cycle phase	Preparatory	Development	Implementation & monitoring
Financing scheme	<b>EPC &gt; A2</b>	Revolving/investment funds > A1 <b>Citizens finance &gt; A1</b> <b>EPC &gt; A1</b>	<b>EPC &gt; C2</b> Third party financing (e.g. loans from financial institutions, private investors) > B1 <b>Citizens finance &gt; B2</b>
PROJECT 2	Trnava	S.Energia	ESV
Project cycle phase	Preparatory	Development	Implementation & monitoring
	<b>Public lighting</b>	<b>Public lighting</b>	<b>Public lighting</b>
	<b>EPC &gt; A2</b>	<b>EPC &gt; A2</b>	<b>EPC &gt; C2</b> Third party financing > B1 Citizens finance > B2
	<ul style="list-style-type: none"> <li>&gt;Understanding the <b>EPC mechanism</b> and its details.</li> <li>&gt;Learn how to <b>combine self funding</b> part of financial instruments</li> <li>&gt;Learn how to apply <b>flexible savings</b> depending on the itinerary of saving measures, e.g. if some measures (photovoltaics) are done in the year 5, when the expected efficiency of PHVe will be much higher than today</li> <li>&gt;Learn whether there are cases, where EPC affects the municipal budget or it is always <b>budget-neutral</b></li> </ul>	<ul style="list-style-type: none"> <li>&gt;<b>Public buildings</b>: Learn how to implement a revolving fund for energy efficiency in the municipalities. Learn how to develop an energy efficiency financing process for example by citizen financing for energy efficiency or renewable energy production in public buildings, and pass this model to other public and private organizations.</li> <li>&gt;<b>Public lighting</b>: Learn how to implement an EPC model for public lighting considering the establishment of the based scenario and information about the most difficult barriers/issues and ways of solving them.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Facilitation of <b>EPC implementation</b></li> <li>&gt;Technical experience in <b>street lighting and energy efficiency projects</b></li> <li>&gt;Practical experience from the implementation of a long-term <b>support programme</b></li> </ul>

Legend: **match** / no match

The summary of the mentors' and mentees' learning objectives:

- **ESV regional energy agency** will share its expertise on facilitating of EPC implementation, technical experience in street lighting and energy efficiency projects and its practical experience with the implementation of a long-term support programme. ESV has an 'expert level' (C) in one financing scheme (EPC) and 'intermediary level' (B) in two financing schemes (third party financing and citizen finance).
- **The city of Trnava** has been working on two projects (preparatory phase) in the sector of public buildings and public lighting. The city wishes to learn about Energy Performance Contracting (EPC). This matches perfectly with the expertise that ESV can offer.
- **S. Energia** has been working on two projects (development phase). In the sector of public buildings, the priority is to learn about a **revolving fund / investment fund and citizen finance**. In the sector of public lighting, the priority is to learn about EPC.

Unfortunately, ESV cannot offer expertise in the field of revolving/investment funds. However, it can offer higher expertise than S.Energia in three other financing schemes:

- o EPC: C2 > A2
- o Citizen finance: B2 > A1
- o Third party financing for public lighting projects: B1 > A1

**The conclusion is that Trnava can be matched with ESV who can help the city meet all its learning objectives for both priority projects. S.Energia can be matched with ESV who can share expertise on all requested financing schemes except for the priority n°1 financing scheme (revolving/investment fund). ESV can organise a study visit involving both mentees in accordance to the structure of the PROSPECT learning program.**

# Appendix

## *Application forms*

### **Application form for mentors:**

[https://docs.google.com/forms/d/e/1FAIpQLSfyEyVMDmR0mbfv2G4qeLZ\\_CGFcmfBFdV0yhnd3whuo9HxG7w/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLSfyEyVMDmR0mbfv2G4qeLZ_CGFcmfBFdV0yhnd3whuo9HxG7w/viewform?usp=sf_link)

### **Application form for mentees:**

[https://docs.google.com/forms/d/e/1FAIpQLSfT9rRXW0MTk7iamP4G3mmfmeNLWGNR3RkKKG40GqkVhSBZXQ/viewform?usp=sf\\_link](https://docs.google.com/forms/d/e/1FAIpQLSfT9rRXW0MTk7iamP4G3mmfmeNLWGNR3RkKKG40GqkVhSBZXQ/viewform?usp=sf_link)



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