



**Project acronym: EnerSHIFT**  
**Social Housing Innovative Financing Tender for Energy**

**DELIVERABLE 4.2**

**Report on tender presentation events**

**November 2017**



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In order to promote a wide participation to the EnerSHIFT tender, Regione Liguria and the project partners presented the call to national and international stakeholders, in order to spread information about the EnerSHIFT initiative and rise interest among ESCOs and market operators working in the Energy Efficiency Sector.

Beyond the promotion of the tender through on the national and European formal channels (Official Journals), information about the call have been published on national press and specialized media, on the EnerSHIFT website, on the project newsletter and on other digital tools at national and European level (i.e. FEDARENE newsletter).

Moreover, a press release has been published by Regione Liguria.

Beyond publicity, the tender has been presented and widely explained to national and international stakeholders during these events:

<b>EVENT</b>	<b>DATE</b>	<b>PLACE</b>	<b>PARTNER</b>	<b>Public/Stakeholders</b>
Presentation of the EnerSHIFT call for tender to ESCOs and Banks	6 <sup>th</sup> September 2017	Genoa	Regione Liguria and all partners	ESCo national associations, EE and building market operators, banks national association, financial institutions
Utility week 2017 HUB session "Intelligent Buildings"	3 <sup>rd</sup> October 2017	Amsterdam	Regione Liguria	Utilities, EE market operators, PA, ESCOs, EU institutions.
EPC contract development and Best Practices - F.I.R.E. National annual meeting	11 <sup>th</sup> October 2017	Bologna	IRE spa	F.I.R.E. associated members (ESCOs and EE market operators), EPC facilitators.
"Key Energy" fair at "Ecomondo" festival 2017	8 <sup>th</sup> November 2017	Rimini	Regione Liguria	EE market operators, ESCOs, national stakeholders in the energy sector
"Genova Smart Week"	20 <sup>th</sup> November 2017	Genoa	Regione Liguria	Universities, research institutes, national and regional Governments, PA, EE market operators

On these occasions, a technical summary of the tender has been disseminated among stakeholders in IT and EN to facilitate the participations to the call.

Details of the events are provided below:

## **Presentation of the EnerSHIFT call for tender to ESCOs and Banks**

On September the 6th, at the Regione Liguria premises, the EnerSHIFT tender for energy refurbishment through EPC contracts has been presented to the Trade Associations of companies in the Energy Efficiency sector and to Banking Representatives.

The project coordinator explained the legal and financial structure of the competition, the modalities of participation, the awarding criteria and the core aspects regarding the economic sustainability of the initiative, in order to promote the participation of ESCs while encouraging the bankability of the projects.

In particular the Coordinator explained that, from a regulatory point of view, the tender is based upon the legal institute of the Concession of Services within the meaning of the Italian Public Procurement Code, to be awarded through an open procedure and according to the MEAT criteria (most economically advantageous tender) and that ESCOs winning the tender will sign EPC contracts under the Shared Savings model.



The representatives of the Associations appreciated the possibility to better investigate the tender structure; moreover, they actively participated in the meeting with reflections and suggestions on how to promote the replicability of such initiatives at regional and national level.

Indeed, the EnerSHIFT competition is the first nationwide tender using EPC contracts for Social Housing buildings energy re-qualification: this provided, the identification of the legal scheme of the tender as well as the elaboration of its financial plan tackled complex technical, legal-administrative and economic-financial issues and obstacles to the definition of a structure responding both to the needs of the Public Administrations promoting the tender and to the expectations of the market operators.

Through the definition of the EnerSHIFT tender structure, the project partnership tried to meet the needs of the ESCOs: for example, one of the main features of this tender (which turned out to be very challenging to realize at legal level) is that ESCO are appointed the freedom/responsibility to design the EE technical projects, since they are the ones (as required by the law) who assume on themselves the whole financial risk of the operation. Indeed, another issue which was discussed during the meeting concerned the legal obstacles faced by the project partners to support the financial plan of the tender with public funds, in order to increase the economic sustainability of the initiative, which for sure would have promote a wider participation from ESCOs and facilitate the bankability of the projects.

As registered during the meeting, at national level there is a general lack of public financial instruments (primarily guarantee funds) to support the ESCo market.

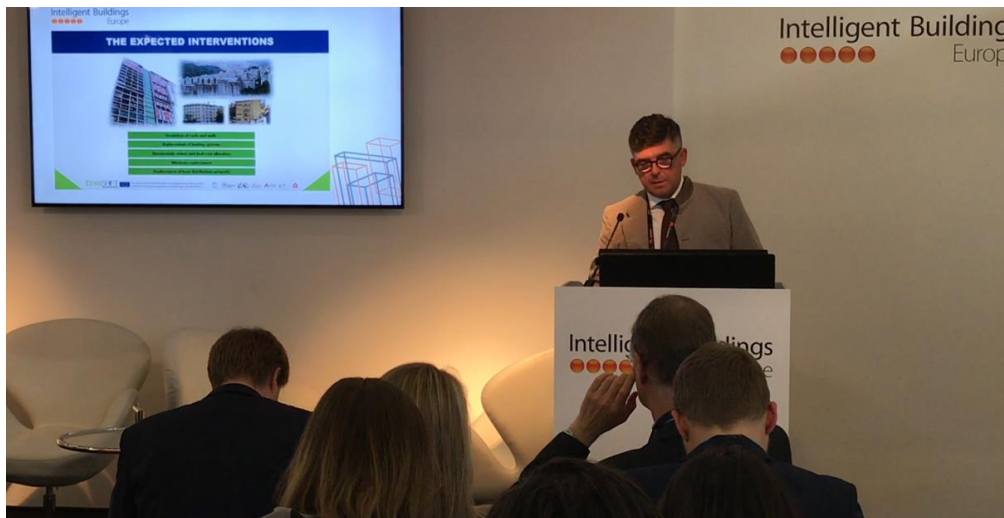
EnerSHIFT tried to overcome this obstacle by proposing alternative measures aimed at encouraging the bankability of the project (such as the possibility of transferring credit to banks, the establishment of a Memorandum of Understanding with Credit Institution...), which was well received by the Banking operators attending the meeting; this provided, the positive approach of the market operators towards the EnerSHIFT initiative was a well-wishing feedback for the tender outcomes.

## EnerSHIFT presented at the European Utility Week 2017

On October the 3rd, EnerSHIFT was presented to the large energy market operators community in Amsterdam at the European Utility Week 2017, one of the most important European events dedicated to innovation and information for utilities and smart-cities.

The coordinator illustrated to the public the strategy adopted by the EnerSHIFT partnership to reach the main objective of the project, which was an interesting occasion to discuss with world-wide stakeholders and industry experts about the innovative financial models elaborated within EnerSHIFT. Indeed, this topic attracted the interest of several operators aimed to make “smart buildings” a driver for the achievement European energy objectives by 2020 and 2040

In the meantime, the Utility Week has been an important platform to promote the participation of ESCOs to the EnerSHIFT tenders since, within the same framework, the European ESCO Association annual meeting took place under the name of “European Intelligent Building Event”.





## Presentation of the EnerSHIFT call for tender during the F.I.R.E. National meeting about “EPC contract development and Best Practices”

On the 11<sup>th</sup> of October, FIRE (Italian Federation for energy efficiency) held a national conference about EPC contracts in the public, residential and industrial sector: the working day dealt with the hottest issues regarding the application of these contracts, including the advantages, strengths and weaknesses of this tool and the barriers that still limit the recourse to EPC in Italy. Among the most important topics, the availability of a performance guarantee, coupled with third-party financing, which are two particularly interesting items for end users. Then, the participants discussed about the importance, in order to obtain maximum benefits, to prepare contracts with an overall and dynamic view of the considered reality, starting with the energy diagnosis to the measurement and verification of the performance, through the involvement of the funding subjects, up to the control of the results from start to finish of the project. The impacts of the new Eurostat note on EPC reporting for PA was also discussed.

Several proposals were exposed to make EPC easier to use and, on this topic, some good practices at national level were presented: among these, the EnerSHIFT EPC tender.

Mrs. Fabianelli of IRE spa - Director of Energy Division, illustrated the process carried forward by the EnerSHIFT project for the implementation of the EPC competition for the energy retrofitting of Social Housing building in Liguria and widely illustrated the call to the market operators.

More information about the event are available here: [http://www.fire-italia.org/conferenza\\_epc/](http://www.fire-italia.org/conferenza_epc/)



**CONTRATTI EPC**  
per la riqualificazione  
energetica di edifici e  
processi industriali

**11 OTTOBRE 2017**

Zanhotel Europa  
Via C. Boldrini, 11  
BOLOGNA

FIRE  
FEDERAZIONE ITALIANA PER  
L'ENERGIA EFFICIENTE

**Programma**

9,00	Registrazione dei partecipanti	***
9,30	Saluti e introduzione ai lavori	Cesare Boffa, FIRE
9,45	Le sfide dell'EPC	Daniele Forni, FIRE
10,05	Le nuove norme allo studio sull'EPC a livello europeo	Ettore Plantoni, CTI
10,25	Il progetto GuarantEE: approccio triple win	Giulia Centi, ENEA
10,45	Esperienze nel settore pubblico	Giuseppe Maffei, EGE SECEM Marta Fabianelli, IRE Liguria Cinzia Colangelo, Regione Marche
11,45	Esperienze nel privato	Pier Luigi Zanotti, EGE SECEM Paolo Paglierani, EGE SECEM Daniele Fiorean, EGE SECEM Massimiliano Franccone, ENEL
12,45	EPC: come costruire una contrattualistica solida	Svenja Barfels, Rödl & Partner
13,00	Monitoraggio, misura e verifica dei risparmi energetici	Stefano D'Ambrosio, FIRE
13,15	Spazio per la discussione	
13,30	Chiusura conferenza (i lavori del pomeriggio sono riservati ai soci FIRE)	
15,00	Seminario di approfondimento sul protocollo di misura e verifica dei risparmi Temi: basi sulla misura e verifica dei risparmi energetici (M&V) e caratteristiche dei protocolli: ISO 50015, ISO 50006 e IPMVP. Incontro moderato da Daniele Forni, FIRE.	
17,30	Chiusura lavori	***

Sponsor

Patrocini

## “Key Energy” fair at “Ecomondo” festival

EnerSHIFT has been protagonist at the “Key Energy” fair in Rimini where it was presented as a pilot action in the context of the "Living Technologies: Efficient Building & Anti-Seismic Prevention" conference, organized by ENEA on 8<sup>th</sup> November with the aim to spread the use of innovative tools for the promotion of building efficiency.

“Key Energy” is an international Exhibition dedicated to Energy and Sustainable Mobility that takes place simultaneously with “Ecomondo” fair. This year the event focused on technologies, systems and solutions for the efficient use of resources (Key Efficiency) and for the transformation of urban areas in smart cities (Key Energy).



Through EnerSHIFT, the experience presented by Regione Liguria has contributed to broadening the range of instruments available to public administrations in the case of large-scale energy redevelopment projects and has proposed effective solutions to criticalities and barriers that hinder the implementation of energy efficiency initiatives in the public domain.

Moreover, the presence of a wide range of EE market operators allowed the project coordinator to promote the participation to the EnerSHIFT call for tender both towards big and little-sized ESCOs coming from all over the country; this was a very important occasion to explain the terms of reference of the tender for the 3 different – sized lots, so to stimulate the participation of SMEs.

In the end, EnerSHIFT participated to the technical table organized by ENEA, which gathered together the most important stakeholders on energy and efficiency at national level (i.e. the Ministry of the Environment and AssoEsco) with the aim to identify new proposals to increase the rate of building renovation.

## Genova Smart Week

On September 20th, EnerSHIFT was presented at “[Genova Smart Week](#)” as a best practice in the field of financial innovation for energy efficiency initiatives. Genova Smart Week – now at its third edition – is an international fair organized by the Municipality of Genoa to promote the implementation of the “vision” aimed to transform urban areas into smart cities. This year, Business Models & Solutions, Enterprise 4.0, Urban Platform and Green Solutions were the main topics of the event.



In the theme session: “BUSINESS MODELS & SOLUTIONS for the development of the Smart City”, Liguria Region contributed to the spread of new models of economic sustainability through the presentation of the experience gained through EnerSHIFT: to date, at national level, the financial model drawn up for the EnerSHIFT call for tender through EPC contracts is one of the few cases where innovative solutions to economic, financial and legal barriers limiting the use of PPP tools by the Public Administrations have been identified and applied.

This, opens the way to the replication of similar initiatives by other Public Bodies because it provides an application model for PPP ready to use: in fact, it complies with the New Italian Procurement Code (the implementation of EPC contracts takes place through “Public Service Concessions”), it respects the EUROSTAT guidelines on off-balance sheet accounting and it addresses in the same way to the needs of Administrations and ESCOs.

The public-private stakeholders attending the Genova Smart City conference have been very interested about the EnerSHIFT experience and the EE Market Operators present at the meeting had the opportunity to be informed in detail about the EnerSHIFT EPC call for tender, whose participation terms, indeed, had recently been extended to the 18th of December. Most of all, the financial aspects of the tender have been explained.