



Report on exploitation events

Author: ECN with GoParity, REGEA VEB, VIPA

CitizEE

*Scaling up Public Energy Efficiency Investments via Standardising
Citizen Financing Schemes*

www.CitizEE.eu



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement N° 847147

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TECHNICAL REFERENCES

| | |
|---------------------|--|
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PU = Public

PP = Restricted to other programme participants (including the Commission Services)

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)

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EXECUTIVE SUMMARY

Description of the report content and purpose

In order to increase the knowledge, find potential partners for the projects where citizens' finance might be employed in energy efficiency projects, a series of training workshops and webinars were envisaged to be held. Facilitation of face to face workshops turned out to be difficult during the Covid pandemic. The activities aimed to increase capacity on citizen funding at country level by creating attractive investment opportunities.

Exploration events on local level were delivered within Task 6.6 Exploitation and Subtask 6.6.4. These were national workshops with the aim of promotion of the project outputs and to engagement of other regions and stakeholders within the target countries. Four such events were held in each pilot country, namely Belgium, Croatia, Lithuania and Portugal. The workshops were held online in three cases and offline in one case.

Abbreviation list

EPC - Energy Performance Contracting

ESCO - Energy Savings Company

ITI - Integrated Territorial Investment

NECP - Croatian National Energy and Climate Plan

REGEA - Energy Efficiency Agency Croatia

VEB - Vlaams Energiebedrijf

VIPA - Public Investment Development Agency Lithuania

1. Introduction

Innovative citizen financing schemes are a relatively new concept still far from having reached its full potential. They combine under their roof different financing sources and have proven to be very successful in financing projects in the field of renewable energy. Examples of such innovative citizen financing schemes are the combination of citizen financing, crowdfunding or cooperative financing, which are then complemented with public financing instruments. However, citizen access to such alternative financing mechanisms remains largely unexploited.

The CitizEE project counteracts on this by establishing national and/or regional Investment Platforms, which are backed by the European Fund for Strategic Investment. The IPs serve as investment facility that channels public and private financing from several co-investors (citizens, public banks and institutions etc.). In that sense, IPs bring together all market players: citizens, associations and the economic sector. The additional integration of innovative Citizen Financing Schemes into those Investment Platforms enables the set-up of large-scale community energy efficiency programs and attract private investments while also strengthening know-how of regional/national key stakeholders.

The four exploration events were arranged within third party events in order to increase reach in three case and as a stand alone event in one case. Each event focused on the particular impact and lessons learned from each national pilot developed under CitizEE. Stakeholders were directly involved and motivated to participate actively in knowledge exchange and discussion.

The objective of the exploration events was to foster dialogue between key national stakeholders on how to improve access to citizen finance for energy efficiency and renewable energy investments based on the experience made by the CitizEE partners. Each workshop created a bespoke structure and presentation of its direct results.

In the following we outline all four workshops with individual reports and information.

2. Belgium / VEB

2.1. Overview and description of the local workshop (event/meeting)

VEB acts as a program manager for the further deployment of its CitizEE-pilot at the educational sector. More specifically, multiple EPC projects are going to be rolled out at schools of the educational organization GO! with the aid of VEB. While most of the preparations for the ESCO call are done in close collaboration with the organization's central body, it is also important to gain support at the level of the local school groups and to understand their concerns.

2.2. Summary of the main take aways of the workshop

To that end, a national workshop was organised for local stakeholders and schools on 14 March 2022 as part of a full day of networking activities. The national workshop showcased take-aways of the CitizEE-project and pilot project in Belgium. Participants were introduced to the current selection criteria for further facilitation. They were able to actively participate to some panel discussions and got the opportunity to ask some questions.

2.3. Conclusion

The project was welcomed with a sense of enthusiasm and the panel was able to give satisfying answers to the schools' needs. Further discussion with individual stakeholders are expected to result from the workshop.

2.4. Annexes

Agenda

- 9h00: Welcome
- 9h30: Introduction
- 10h00: Guided tour
- 11h00: Pause
- 11h30: Session – playground – experience from schools in Brussels
- 12h30: lunch
- 13h30: Info session Inspection crawl spaces
- 14h: Interactive sessions: pitching ideas of processes at school group level
- 14h30: Session CitizEE

Signature sheet

| Name | School Group | E-mailadres (waarmee je inlogt op MS Teams). |
|--------------------------|--------------|--|
| Kris Reynders | | 1 Reynders.l4.be |
| Ana Cetina | | 1 ana.cetina |
| <i>Veerle Dockx</i> | | 3 |
| Geert Van Noten | | 5 geert.van |
| Geert Joos | | 6 geert.joos |
| <i>Bjorn Mermans</i> | | 7 |
| Kenny Salliau | | 8 Kenny.sall |
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| Rogier Denecker | | 11 rogier.der |
| <i>Boussu Thierry</i> | | 12 |
| Peter Heyligen | | 13 peter.hey |
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| <i>Frederik Vanparys</i> | | 22 |
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| Inneke Bosmans | CD | |
| Kelly Van Braeckel | CD | |
| Jan Van Vooren | CD | |
| Els Canini | | |
| Peggy Schoonheydt | CD | |

Photos



Presentations





Climate subsidies

New subsidies from Flemish Climate Fund

VKF – climate fund phasing out oil

CitizEE: call ESCO



CitizEE: ESCO call together with VEB

7,5 mio € from Flemish Climate fund to ESCO projects within GO

- Budget approved on December 17th, 2021
 - 7,5 mio euro from Flemish Climate Fund
 - 7,5 mio euro from own resources
 - SG resources (small infrastructure)
- Organized through a call by VEB
- Principles selection are refined by VEB: annex to Ministerial nota
- Additional guidelines for selection to be approved on Board March 24th, 2022



CitizEE: ESCO call together with VEB

7,5 mio € from Flemish Climate fund to ESCO projects within GO

- Selection criteria
 - Heating room renovation: replacement idealiter fossil fuel free
 - Envelope simple to post-isolate: year of construction 1990, enlarged to 1970
 - Projects with min investment cost of 1mio euro, school groups can cluster applications
 - Building needs to be investment worthy (end ESCO contract = 2045)
 - (Relatively) high **monitoring score** envelope (ntb)
 - Building needs to be put in use for education during ESCO contract
 - **Area:** min. 1000 m² + conform physical normation
- Timing
 - Selection Q4 2022
 - Facilitation: begin 2023
 - Implementation: by 2025



CitizEE: ESCO call together with VEB

7,5 mio € from Flemish Climate fund to ESCO projects within GO

- Some uncertainties remain before take-off:
 - What's the full scope? Enough potential buildings?
 - Importance of stock (taking) assessment!
 - How is call going to be orchestrated? By building, domain, school group?
 - Who's going to do the facilitation of the project?
 - Collaboration VEB, CD, SGR and
 - One facilitation contract or facilitation per SGR?
 - VEB facilitator or other external party?
 - Can SGR inject additional resources?
 - ESR-neutrality?



3. Croatia / REGEA

3.1. Overview and description of the local workshop (event/meeting)

As part of the Smart Financing for Smart Buildings initiative and feeding into the Renovation Wave for Europe, the European Commission is organising a series of Sustainable Energy Investment Forums (SEI Forums) to enhance the capacity of and co-operation between public and private stakeholders to develop large-scale investment programmes and financing schemes. Since 2016, SEI Forums has organised over 40 events covering many EU Member States.

A first SEI forums Roundtable on financing energy efficiency had been organised in Croatia on 28 and 29 October 2020. The objective was to foster discussion on how to improve access to private finance for energy efficiency investments, on how to resume the EPC/ESCO Programme by combining European structural and investment funds (ESIF) and private capital and on how to improve the Integrated Territorial Investment (ITI) mechanism and accelerate investments.

The objective of this second National Roundtable on Financing Renewable Energy in Croatia was to foster dialogue between key Croatian stakeholders on how to improve access to private finance for renewable energy investments, in context of Croatian National Energy and Climate Plan (NECP), Croatian Recovery and Resilience Plan, Green Deal Investment Plan and with the support of Programmes such as the InvestEU and the Just Transition Fund in the 2021-2027 period.

The first day of the roundtable (Monday, October 25th, from 09:00 to 12:10) was dedicated to the Croatian and European political and legislative framework and a discussion on financing building integrated PV systems and the challenges that investors are facing.

On the second day of the round table (Tuesday, October 26th, from 09:00 to 12:30), an interactive meeting was held in two thematic groups:

- Integrating energy projects in spatial planning – practice examples (09: 00-10: 40 CEST)
- Citizen investment in sustainable energy – challenges and solutions (10: 50-12: 00 CEST)

3.2. Summary of the main take aways of the workshop

Some of the main conclusions and take aways are listed below:

- the new legislation and bylaws related to the electricity market and renewable energy sources will contribute to the further development of the energy sector and enable active participation of citizens and local communities in the market.
- the active role of citizens in the electricity market is enabled through the introduction of new entities such as energy communities, aggregators, cooperatives and similar.
- in addition to contributing to a stable regulatory framework and accelerating the energy transition, the novelties of the new regulatory framework over a longer period of time will have a positive impact on strengthening the entrepreneurial spirit and reducing grant dependence.
- market liberalization through new energy activities also brings new challenges for commercial banks, as traditional financial instruments will not be enough to meet the investment needs of new players in the electricity market and financial institutions have already begun designing new financial models and products.
- the use of renewable energy sources is only one part of the puzzle, because for complete decarbonisation by 2050 it is necessary to achieve synergy of all technologies and elements of energy transition such as electromobility and heating systems, but also to educate the broadest layer of citizens about all the benefits of energy transition.

3.3. Conclusion

The announced solarization of Zagreb, but also technical assistance in the preparation of integrated solar power plants provided by REGEA through the PVMaX project, will contribute to increased use of renewable energy sources, but also further education of citizens and capacity building of other stakeholders.

3.4. Annexes

Agenda/Invitation



Sustainable Energy Investment Forums

National Roundtable on Financing Renewable Energy in Croatia

Zagreb, October 25-26 2021

Online event

Organised by the European Commission in partnership with North-West Croatia Regional Energy Agency – REGEA and under the auspices of the Ministry of Economy and Sustainable Development

Form: Introductory plenary session, thematic parallel sessions, summarizing plenary session

Participants: Key Croatian stakeholders upon personal invitation, public authorities, industry/commerce/buildings sector, public and commercial banks, energy agencies, business support organisations, energy advisors, researchers, NGOs.

Background:

As part of the [Smart Financing for Smart Buildings](#) initiative and feeding into [the Renovation Wave for Europe](#), the European Commission is organising a series of [Sustainable Energy Investment Forums](#) (SEI Forums) to enhance the capacity of and co-operation between public and private stakeholders to develop large-scale investment programmes and financing schemes. Since 2016, SEI Forums has organised over 40 events covering many EU Member States.

The objective of the second National Roundtable on Financing Renewable Energy in Croatia is to foster dialogue between key Croatian stakeholders on how to improve access to private finance for renewable energy investments, in support of the Croatian National Energy and Climate Plan (NECP), its Recovery and Resilience Plan, in the context of the Green Deal Investment Plan and with the support of Programmes such as the InvestEU and the Just Transition Fund in the 2021-2027 period.

This event is organised by the European Climate, Infrastructure and Environment Executive Agency (CINEA) in the frame of the [Sustainable Energy Investment Forums](#) initiative, funded under the EU Horizon 2020 programme



REPUBLIC of CROATIA
Ministry of Economy and
Sustainable Development



European
Commission



REGIONALNA ENERGETSKA AGENCIJA
NORTH-WEST CROATIA
SJEVEROZAPADNE HRVATSKE
REGIONAL ENERGY AGENCY

AGENDA

In the context of the ongoing COVID-19 outbreak and in view of preserving public health, the event will take place online over two days. Day one will be dedicated to plenary speeches followed by question and answers sessions. Day two will host two discussions with the key stakeholders.

Day 1 October 25 2021

9:00-10:30 Opening plenary

Keynote speech

- How to speed-up energy transition in Croatia, **Dr Julije Domac, REGEA Managing Director and Special Advisor to the President of Republic of Croatia**
- Welcome note, **Dr Tomislav Čorić, Minister, Ministry of Economy and Sustainable Development**
- Update on legislative framework for renewables, **Dr Kristina Čelić, Head of Department of Energy, Ministry of Economy and Sustainable Development**

EU policy context

- **Mr Anastasios Papandreou, European Commission, DG Energy**
- **Ms Tatiana Bosteels, European Investment Bank**

10:30-10:40 Break

10:40-12:30 Topic group A: Financing building integrated PV systems – challenges and solutions

Presentations:

- **Ms Alma Mekić Čerdić, Erste&Steiermarkische Bank d.d.**
- **Mr Edo Jerkić, Megajoule Adria d.o.o./Vivo Insomnia d.o.o.**
- **Mr Mario Perić, Croatian Bank for Reconstruction and Development (HBOR)**
- **Mr Velimir Šegon, REGEA**

Discussion, questions and answers

Invited roundtable participants include renewable energy investment stakeholders including finance providers and project developers, the Ministry of Regional Development and EU Funds, Ministry of Economy and Sustainable Development, Ministry of Physical Planning, Construction and State Assets, Croatian Bank for Reconstruction and Development (HBOR), Croatian Agency for SMEs, Innovations and Investments (HAMAG BICRO), commercial banks and Academia as well as the European Commission, and the European Investment Bank.

12:30-12:45 Conclusions and invitation to the second day

This event is organised by the European Climate, Infrastructure and Environment Executive Agency (CINEA) in the frame of the [Sustainable Energy Investment Forums](#) initiative, funded under the EU Horizon 2020 programme

European
Commission**Day 2 October 26 2021****9:00-10:30 Topic group B: Integrating energy projects in spatial planning – practice examples****Presentations:**

- Mr Marko Zlonoga, REGEA
- Mr Bojan Linardić, M.Arch., Director of Institute for Spatial Development, Ministry of Physical Planning, Construction and State Assets of Republic of Croatia
- Mr Ivan Ivanković, City of Zagreb, City Office for Economy, Energy and Environment Protection, Sector for Energy and Climate
- Mr Jurica Perko, REA Sjever

Discussion, questions and answers

Invited roundtable participants include renewable energy investment stakeholders relevant for spatial planning, including Ministry of Economy and Sustainable Development, Ministry of Physical Planning, Construction and State Assets, local and regional administration as well as the European Commission.

10:30-10:40 Break**10:40-12:00 Topic group C: Citizen investment in sustainable energy – challenges and solutions****Presentations:**

- Mr Dirk Vansintjan, RESCoop
- Mr Zoran Kordić, Zelena energetska zadruga
- Mr Ugo Toić, Energy community Apsyrtidies

Discussion, questions and answers

Invited roundtable participants include renewable energy investment stakeholders including finance providers and project developers, the Ministry of Regional Development and EU funds, Croatian Bank for Reconstruction and Development (HBOR), development and energy agencies as well as the European Commission, and the European Investment Bank.

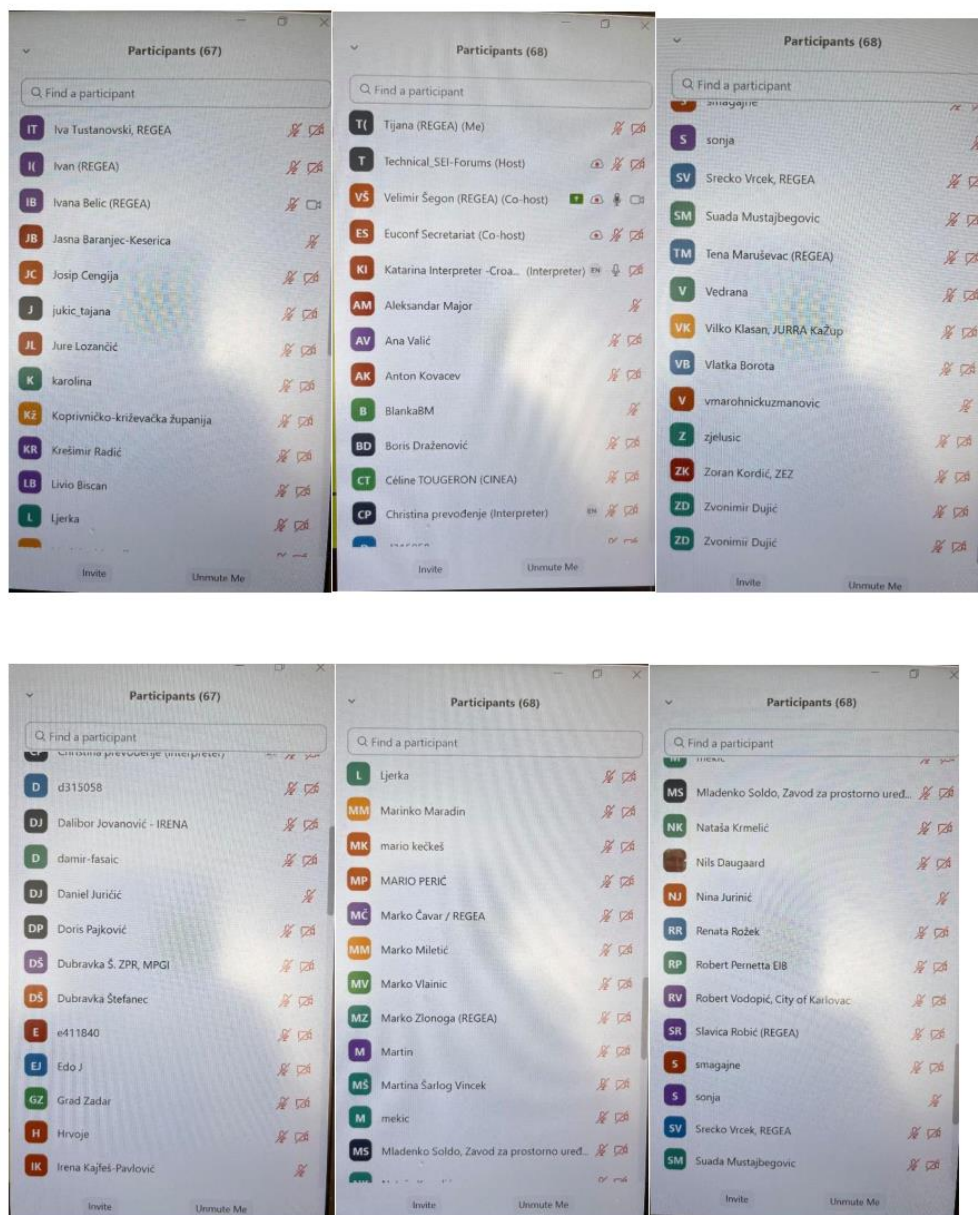
12:00-12:30 Closing plenary

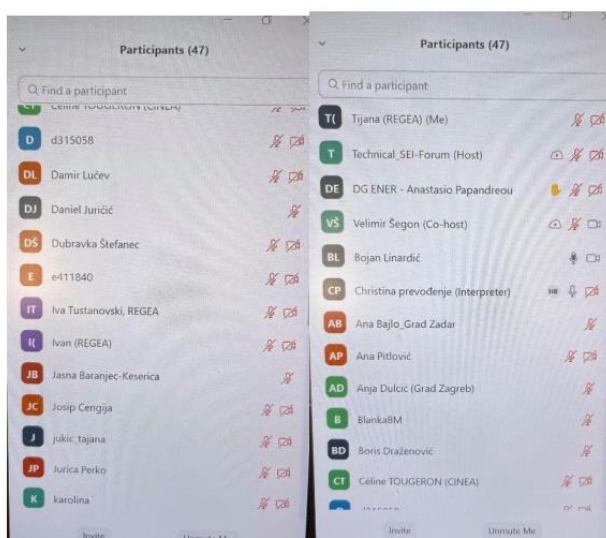
- Report back from topic groups (rapporteurs)
- Q&A with the audience, discussion and next steps

This event is organised by the European Climate, Infrastructure and Environment Executive Agency (CINEA) in the frame of the [Sustainable Energy Investment Forums](#) initiative, funded under the EU Horizon 2020 programme

Signature sheet

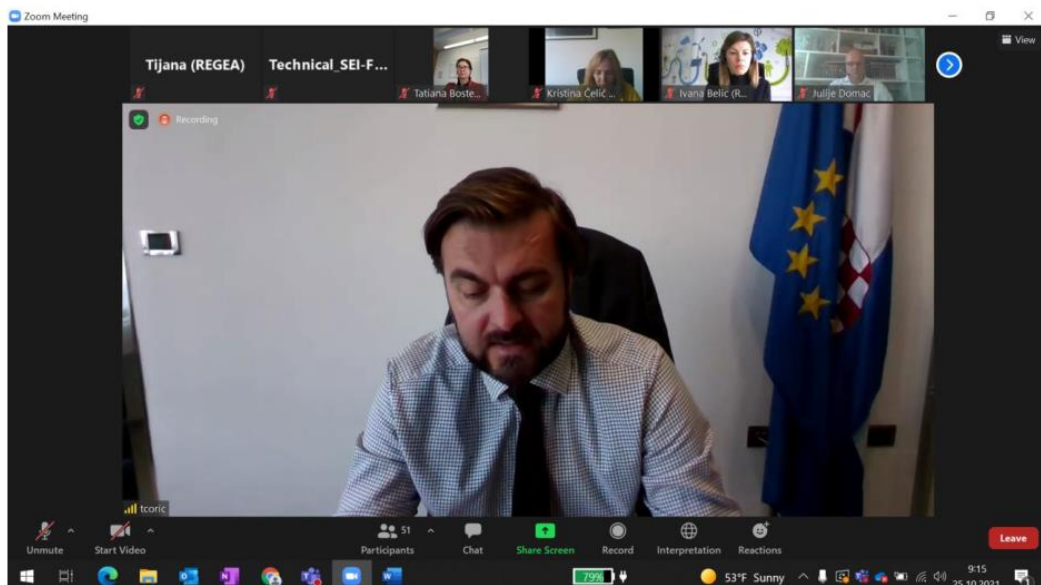
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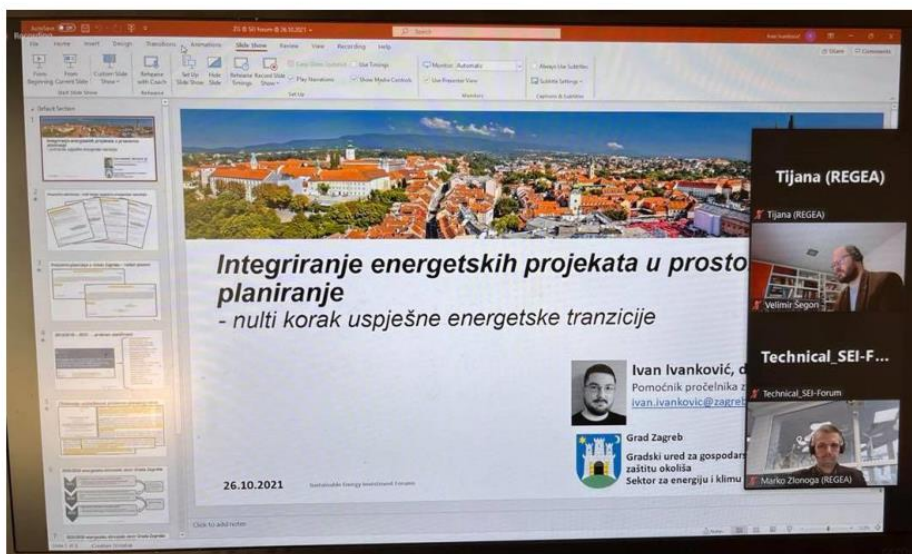
Day 1- 25th October 2021

Day 2- 26th October 2021

Photos

Day 1- 25th October 2021



Day 2 - 26th October 2021

Presentations

Workshop proceedings are available at <https://events.euconf.eu/events/seif-croatia-roundtable-10-2021>

Links to media articles, programs etc.

<https://www.facebook.com/regeaSZhr/photos/a.1703674543106602/3738939389580097/>

<https://www.linkedin.com/company/north-west-croatia-regional-energy-agency-regea/>

4. Lithuania / VIPA

4.1. Overview and description of the local workshop (event/meeting)

The National Exploration Event in Lithuania was held online in respect of relevant Covid related rules at the time. The Lithuanian stakeholders to whom it would be beneficial to hear more on energy efficiency while employing citizen funding were kindly invited to take part in the local online seminar where the CitizEE Action was introduced together with the presentation of VIPA experience as a pilot.

The first part was dedicated to CitizEE Action, explaining why such initiatives are very welcome, in order to build knowledge and gain new ideas and be competitive. The second part of the meeting was dedicated to VIPA experience and lessons learned while trying to extend the investment platform administered by VIPA to CF4EE scheme.

The meeting started at 9:30 am on Friday local time (EET) , March 18th and took about an hour including the discussions after the presentation.

4.2. Summary of the main take aways of the workshop

Some of the main conclusions and take aways are listed below:

- the new legislation and bylaws related to the electricity market and renewable energy sources allowed to develop electricity prosumers market in Lithuania.
- The financing for energy prosumers is getting more accessible for most of creditworthy people, however the market has little to offer for those who might not be considered creditworthy to be financed by banks or other credit institutions and other institutions must be employed.
- The financing through peer-to-peer investment platforms is still viewed as a source of refinancing of bad loans, however, with the VIPA pilot a special niche might be created to further develop the platforms being an alternative to those who wants to invest in infrastructure, this is of a key importance, since this kind of asset class is practically unavailable for the ordinary investors.
- VIPA is willing to invest up to a 500 thousand EUR, that means, that citizens would be able to contribute at least 125 thousand of EUR to potential prosumers and would enable to finance up to 1000 KW of solar panels.

4.3. Conclusion

VIPA pilot, if successfully implemented, will be as a starting point to promote further renewable energy infrastructure projects to be financed by employing citizen funds. However, there are still more to do in order to develop the scheme to be fully operational and attractive to all the stakeholders including the regulatory organisations and final beneficiaries.

4.4. Annexes

Agenda/Invitation

RE: Kvietimas į projekto CitizEE pristatymą - Message (HTML)

File Message Help Tell me what you want to do

Delete Archive Reply Reply All Forward Share to Teams Move Assign Policy Categorize Follow Up Mark Unread Read Aloud Immersive Reader Translate Zoom Viva Insights

RE: Kvietimas į projekto CitizEE pristatymą

Renata Adomavičienė

To: Zana Žimina; Violeta Greiciuvienė; Indrė Kapušytė-Lukoševičienė; Kęstutis Kupšys; Ruta Trainyte; lina.sveiklaite@enmin.lt; jurate.pravalackaite@enmin.lt; Gytis Zakevičius; Aiste Pelakauskaite; Renata Salavejienė; Lina.Vaicuniene@finmin.lt

CitizEE kovo 18 d. darbotvarkė.docx 121 KB

pr 2022-03-14 09:33

Labą dieną,

Viešųjų investicijų plėtros agentūra dalyvauja tarptautiniame CitizEE (viešųjų investicijų į energinį efektyvumą didinimas per standartizuotas piliečių finansavimo schemas)* (angl. *Scaling up Public Energy Efficiency Investments via Standardising Citizen Financing Schemes*). projekte. Projekto tikslas – padėti Europos Sąjungos valdžios institucijoms didinti investicijas į energijos vartojimo efektyvumą statybos sektoriuje, pritraukiant privačias piliečių investicijas.

2022 m. kovo 18 d. kviečiame į susitikimą, kurio metu norėtume pasidalinti projekto rezultatais ir mūsų patirtimi. Maloniai prašome šį kvietimą persiųsti kolegoms, kuriems, Jūsų nuomone, projekto tema būtų aktuali ir naudinga.

Lauksime Jūsų prisijungiant nuotoliniu būdu per *Microsoft Teams* platformą, šioje nuorodoje:

Microsoft Teams meeting
 Join on your computer or mobile app
[Click here to join the meeting](#)
[Learn More | Meeting options](#)

Signature sheet

A signature sheet is not provided as it was on-line event.

Photos

Kvietimas į CitizEE projekto pristatymą

07:12

Request control

People Chat Reactions Rooms More

Camera Mic Share Leave

VIPA NACIONALINĖ PLĖTROS AGENTŪRA

Tomas Gavė...

+17

Citizen financing for energy efficiency

CITIZEE

Dalia Juskeviciene/ VIPA

Dalia Juskeviciene

CitizEE projektas ir VIPA patirtis

Participants

Type a name

Share invite

In this meeting (27)

Mute all

Renata Adomavičienė Organizer

Agnė Vilimaite

Asta Gladkauskienė

Aurelija Babravičienė

Aušrinė Rudinskienė

Dalia Juskeviciene

Deimantė Barytė

Dovilė Medžiūnaitė

Kvietimas į CitizEE projekto pristatymą

19:05

Request control

People Chat Reactions More

Camera Mic Share Leave

VIPA NACIONALINĖ PLETROS ĮSTAIGA

Renata Ado... Vaida Lauru... +24

Prosumer market

Prosumers - persons or legal entities (companies) as well as public sector, who generate electricity from RES only for their own energy needs.

Remote prosumers - producing electricity in one place and using it elsewhere. This creates possibility for prosumers will be able to produce and use electricity for their own needs at different location, using net metering principle.

- 1 **LOCAL:** Electricity produced at the renewable power plant, which is installed on the prosumer property and is consumed at the same location
- 2 **REMOTE:** Electricity is produced at the renewable plant, which is installed on the prosumer property in one location and consumed elsewhere
- 3 **REMOTE renewable farm:** Power plant can be developed by third party, while the prosumer acquires or leases some part of it

Dalia Juškevičienė

In this meeting (28) Mute all

Asta Gladkauskienė

AV Agnė Vilimaitė

AB Aurelija Babravičienė

AR Aušrinė Rudinskienė

DJ Dalia Juškevičienė

Deimantė Banytė

Dovilė Medžiūnaitė

Eligijus Kondrotas

Gražvydas Morkus

Justinas Bučys

Presentations

Citizen financing for energy efficiency

C I T I Z E E



Dalia Juskeviciene/ VIPA

CitizEE projektas ir VIPA patirtis

CitizEE project

CitizEE is a 3 years coordination support action funded under H2020 programme and implemented by 8 organizations across 5 EU members states:

RENEWABLE
ENERGIES

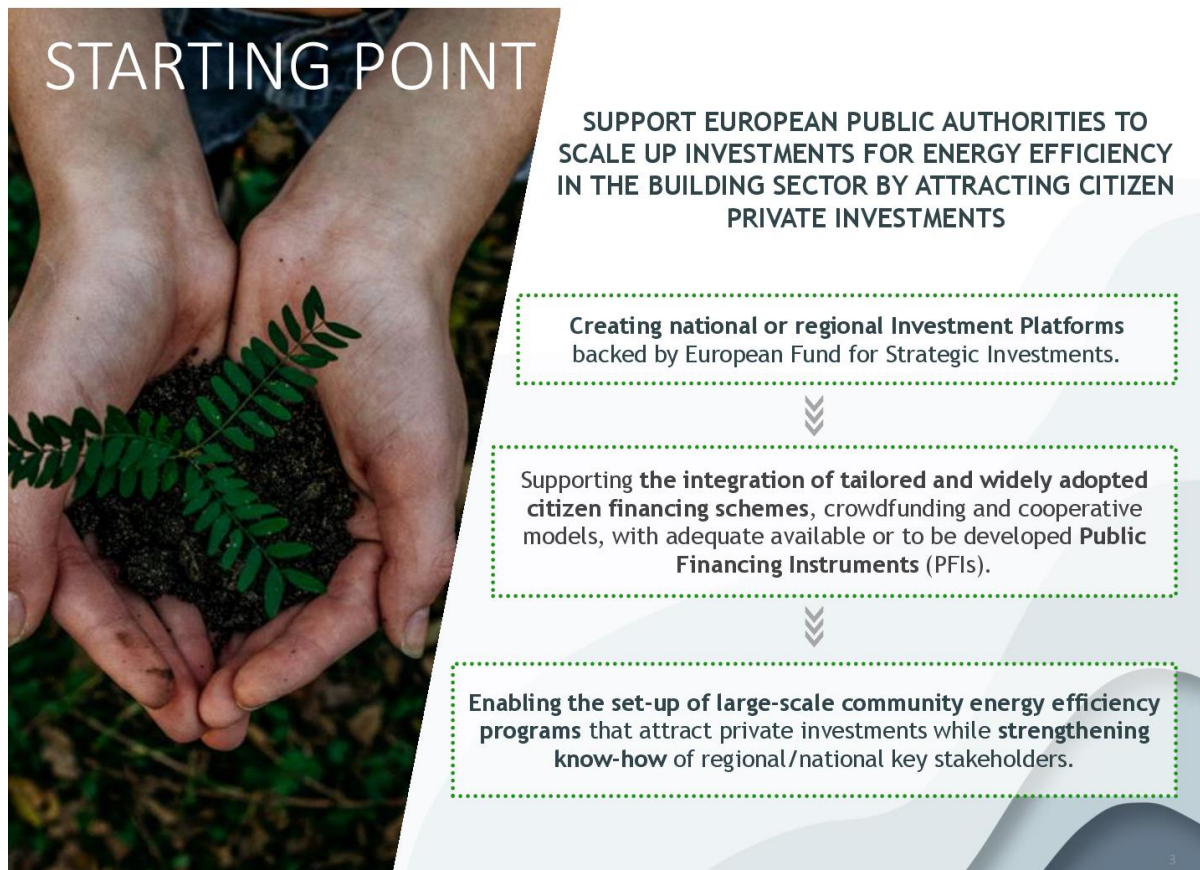
energinvest

Stiftung
UmweltenergierechtEUROPEAN
CROWDFUNDING
NETWORKGO
DARTV

VIPA

NATIONAL
FUND FOR
INNOVATIONREG REGIONALNA ENERGETSKA AGENCIJA
NORTH-WEST CROATIA
SIEVEROZAPADNE HRVATSKE
REGIONAL ENERGY AGENCY

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HOW

COMPETITIVENESS EVALUATION

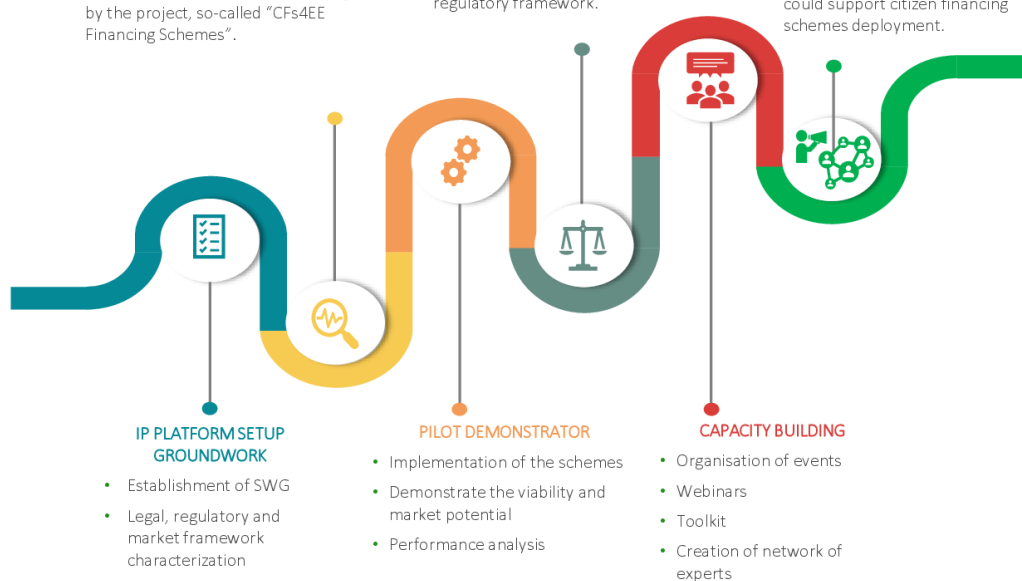
- Analysis of financing products
- Definition of schemes to be developed by the project, so-called "CFs4EE Financing Schemes".

RECOMMENDATIONS

- Develop recommendations for improving the market and regulatory framework.

DISSEMINATION

- Promote the project concepts and its advantages among those who could support citizen financing schemes deployment.



www.citizee.eu



● PORTUGAL



CFS4EE FINANCING SCHEME TO FUND EE/ENR INVESTMENTS IN PUBLIC AND PRIVATE BUILDINGS WITH CROWDFUNDING CO-FINANCING AT PROJECT LEVEL OR IP LEVEL

4

Pilots

● BELGIUM



CFS4EE FINANCING SCHEME TO FUND DEEP ENERGY RETROFIT IN PUBLIC BUILDINGS THROUGH PARTIAL ON-OFF BALANCE EPC CONTRACTING WITH ESCOS/ESCOOPS FINANCING AT PROJECT LEVEL.

● LITHUANIA



CFS4EE FINANCING SCHEME TO FUND PROSUMER SOLAR PV INVESTMENTS IN RESIDENTIAL BUILDINGS THROUGH P2P CROWDFUNDING PLATFORMS AS FINANCIAL INTERMEDIARIES AND CO INVESTORS AT PROJECT LEVEL.

● CROATIA



CFS4EE FINANCING SCHEME TO FUND SOLAR PV INVESTMENTS IN PUBLIC AND PRIVATE BUILDINGS WITH COOPERATIVES AND/OR CROWDFUNDING PLATFORMS AS CO-INVESTORS AT PROJECT LEVEL.

www.citizee.eu

WHAT ELSE

- Get involved and subscribe
- Visit www.citizee.eu
- Follow us on social media



@CitizEE_project



Citizen Financing for
Sustainable Projects
group

www.citizee.eu



VIPA ENERGETINIO EFEKTYVUMO DIDINIMAS PASITELKIANČ SUTELKŲTINIO FINANSAVIMO PLATFORMAS

7

Investment platform

VIPA established an investment platform for financing the energy efficiency projects. The legal status of investment platform is under Law on limited partnership. VIPA runs the entity as *general partner* with unlimited liability. Investors can participate as limited partners whereas liability is limited up to investment amount.

Goals of investment platform:

- Achieve energy savings



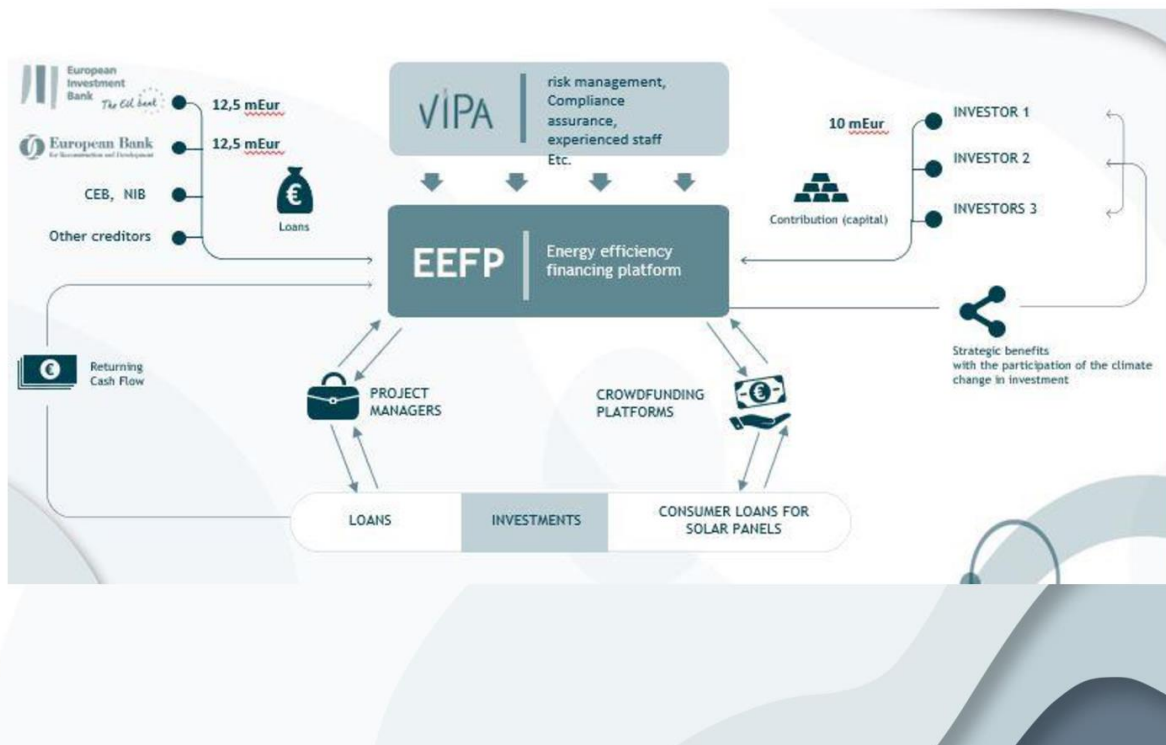
- Reduce CO2 emission



- Finance viable projects



Investment platform



Financing Products of Investment Platform

IP financing products (already implemented)

- direct loans for energy efficiency measures to public/ private/ ESCOs
- direct loans for RES developers dedicated for remote prosumers, who can buy or lease a part of the power plant, built by project developer
- direct loans for shallow renovation focusing on heating systems (loans for multiapartment building administrators)

CFs4EE financing product for prosumers (in development)

Intermediated loans to natural persons (prosumers) through P2P platform operators:

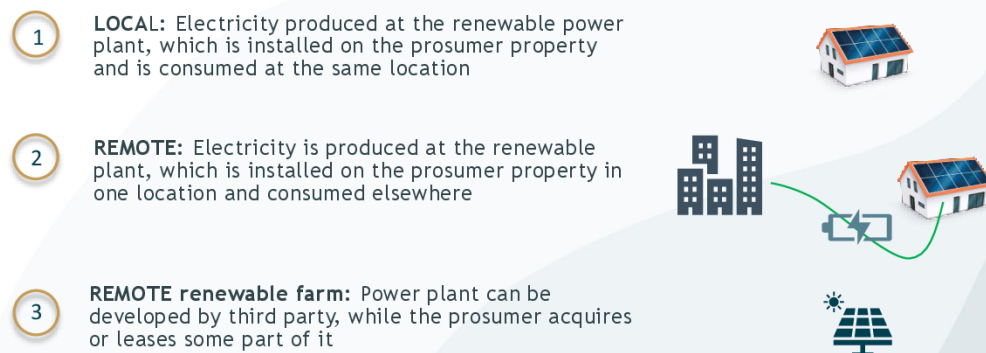
- ✓ citizen's involvement
- ✓ private funding raised

Current status: initiating negotiations with potential P2P platform operators

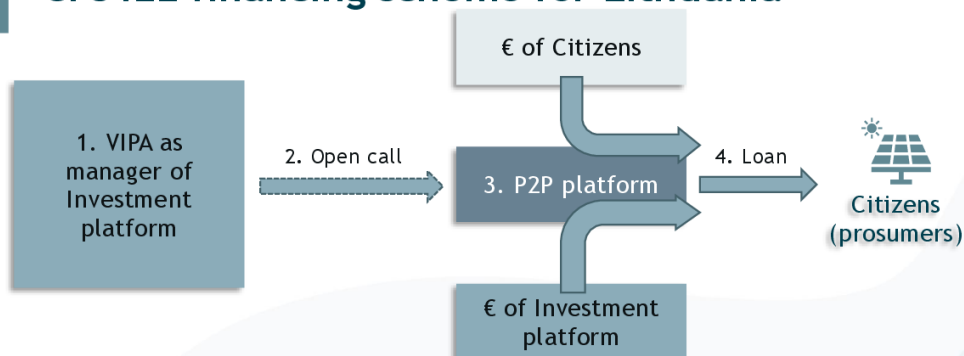
Prosumer market

Prosumers - persons or legal entities (companies) as well as public sector, who generate electricity from RES only for their own energy needs.

Remote prosumers - producing electricity in one place and using it elsewhere. This creates possibility for prosumers will be able to produce and use electricity for their own needs at different location, using net metering principle.



CFs4EE financing scheme for Lithuania



- VIPA is acting as the manager of the Investment platform
- P2P platform operators will be selected through the **open call**
- P2P platform operator will act as a private **co-investor and financial intermediary**
- Loan is subject to **consumer financing laws**. The final loan amount for each prosumer will consist of:
 - investments from the IP (required **ROI lower** than the market's)
 - investments from citizens (**market ROI**)
 - investments from P2P platform operator (**ROI under negotiation**)
- Loan maturity - up to 10 years
- Possibility for prosumers to get subsidy from the state which is ~320 Eur for 1kW

Project Delivery organization

VIPA

Is in charge for project development and has full capacity to:

- launch open call to select P2P platform operators
- select P2P platforms operators and perform their due diligence (risk assessment, financial capacities, etc.)
- assure control of the CFs4EE scheme management and implementation

P2P platform operators

- provide consumer loans for prosumers
- perform financial assessments of prosumers
- enter into loan contracts with prosumers
- co-invest together with VIPA and citizens
- ensure loan eligibility
- perform monitoring of contracts
- manage loan repayments
- perform recovery process
- promote financing product
- report to VIPA

Why?

- One of the strategic goals of Lithuania is the development of Fintech sector
- In 2019 Lithuania was recognized as one of the most dynamic and forward-thinking Fintech Hubs globally. Lithuania's Fintech hub in the **Findexable global ranking** was #4
- Banking sector in Lithuania is very concentrated and risk averse, it is an opportunity for Fintech companies to take over a significant market share
- Shift the perception of peer-to-peer platform form refinancing towards more sustainable investing

Pros:

- Possibility for prosumers get fast funding
- Possibility for IP to reach prosumers, because IP can not provide consumer financing directly
- Possibility to involve citizens in EE project financing
- Lower administrative costs due to IT&AI solutions

Cons:

- Relatively higher financing cost for prosumers



Links to media articles, programs etc.

<https://www.vipa.lt/apie-vipa/dalyvavimas-projektuose/horizon-2020-projektas-citzee/>

5. Portugal

5.1. Overview and description of the local workshop (event/meeting)

GoParity organized on the 21st of April 2022 a webinar for the presentation of Ponto Energia and CitizEE, as tools for matchmaking and investment in EE projects, in collaboration with ADENE (National Energy Agency) and a local ESCO (CleanWatts).

5.2. Summary of the main take aways of the workshop

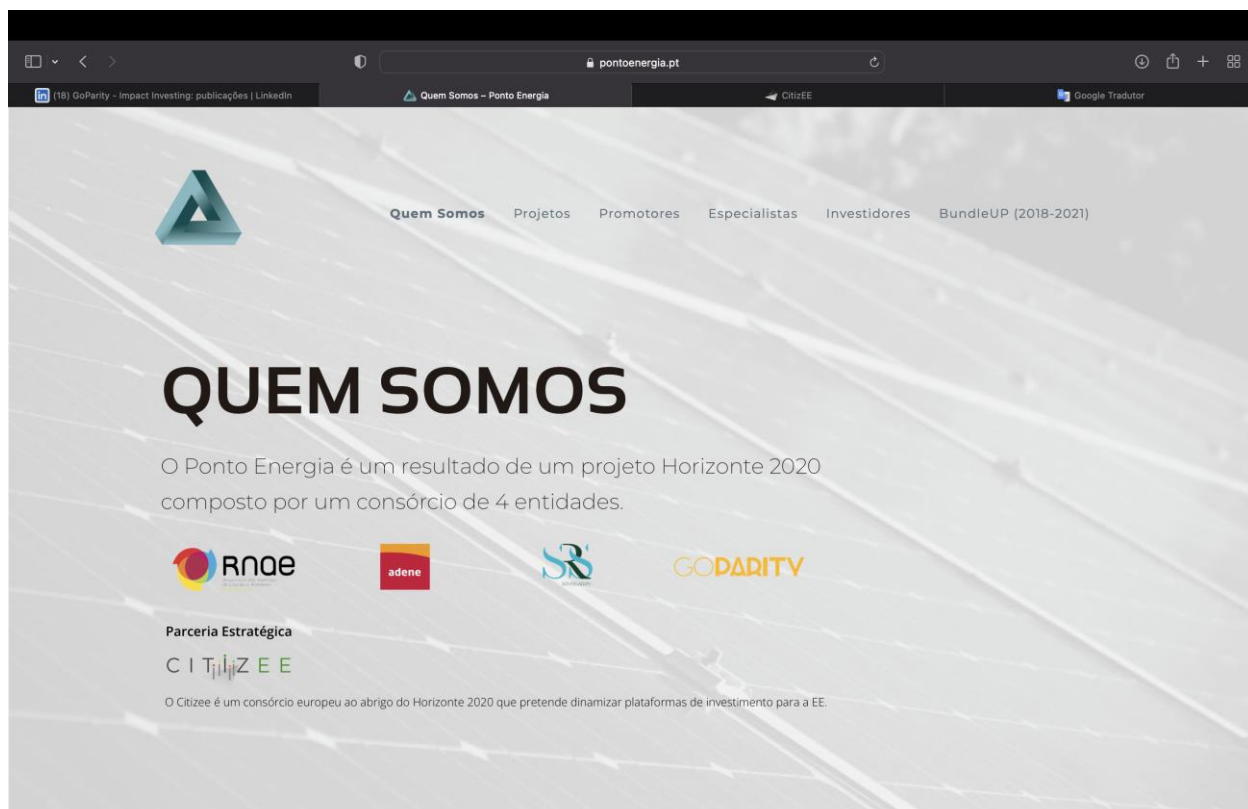
GoParity organized on the 21st of April 2022 a webinar for the presentation of Ponto Energia and CitizEE, as tools for matchmaking and investment in EE projects, in collaboration with ADENE (National Energy Agency) and a local ESCO (CleanWatts). Best practices and case studies were presented during the event, that counted with 30 participants.

5.3. Conclusion

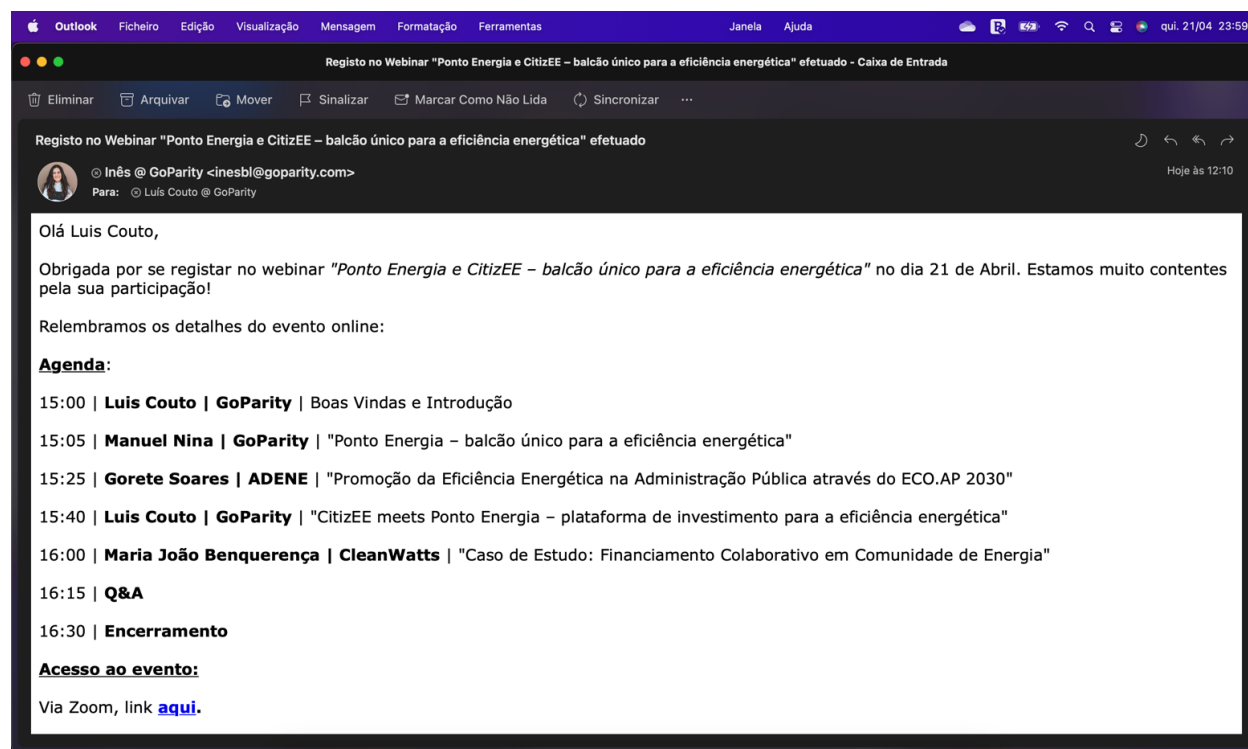
Participants expressed interest in the activities presented under CitizEE. Deeper engagement by public authorities could not yet be established.

5.4. Annexes

Agenda/Invitation



Report on exploitation events



Signature sheet

A signature sheet is not provided as it was on-line event.

| Name | Mail | Organization |
|--------------------------|---------|--|
| João Figueiredo | joao.f | S.ENERGIA - Agência Regional de Energia |
| Susana Camacho | susana | S.ENERGIA - Agência Regional de Energia para os concelhos do Barreiro, Moita, Montijo e Al |
| Manuel Miranda | manu | AE-TM |
| João Barroso | joao.b | S.ENERGIA |
| Ricardo Jorge Beirão | ricard | net |
| Bruno Carvalho | bruno | MedioTejo 21 - Agência Regional de Energia e Ambiente do Médio Tejo |
| Bruno Costa | bruno | AdEPorto |
| Miguel | Lacer | Agência de Energia do Porto |
| Miguel Lacerda | miguel | ENERDURA - Agência Regional de Energia da Alta Estremadura |
| Joana Oliveira | joana | ENERDURA - Agência Regional de Energia da Alta Estremadura |
| Ruben Figueira | ruben | AdEPorto |
| Pedro | pedro | AREAM |
| Catarina Rosário | catari | AMEAL - Agência Municipal de Energia e Ambiente de Loures |
| Susana Silva | susana | AMEAL |
| Fábio Pereira | fabio | AREA Alto Minho |
| Andreia Lino Neto Miguel | andre | AREAM - Agência Regional da Energia e Ambiente da RAM |
| João Alves | joao.a | AMEAL - Agência de Energia e Ambiente de Loures |
| Susana Martins | susana | iPOWER |
| Ana Pacheco | ana.p | INCOM |
| Margarida Guerra | marg | IP Engenharia S.A. |
| Liliana Monteiro | liliana | INCOM |
| Natanael Cartaxo | natan | lar.min-edu.pt |
| Carlos Batalhada Silva | batalh | Parque Escolar |
| Joana Pinto | jpinto | Ministério da Defesa Nacional |
| Silvia Dias | dias.s | Liga dos Combatentes |
| Manuela Ruaz | manu | Defesa |
| Pedro Duarte | pedro | Exército Português |
| Jorge Sequeira | jorge | IPDI |
| João Cartaxo | pires | Marinha |
| Francisco Gomes | cunha | Marinha Portuguesa |

Presentations

The screenshot shows a GoParity webinar interface. At the top, a status bar indicates 'Você está visualizando a tela de GoParity | Manuel...'. The main content area displays the title '3. LIMITAÇÕES E NECESSIDADES' and a sub-section 'FINANCEIRAS'. A list of bullet points discusses financial challenges in sustainable energy projects. On the right, a vertical panel shows three video thumbnails of participants: IPDJ Luisa Costa, Francisca - GoParity, and Rita Costa. The bottom of the screen features a navigation bar with icons for 'Desativar mudo', 'Interromper Vídeo', 'Participantes', 'Bate-papo', 'Compartilhar tela', 'Gravar', 'Reações', and a 'Sair' button.

3. LIMITAÇÕES E NECESSIDADES

FINANCEIRAS

- **Recursos financeiros limitados** para projectos de energia sustentável
- **Falta de provisionamento orçamental** para investimentos em renovação energética, de rotinas de planeamento que têm de ser implementadas e mantidas
- **Custo significativo de estudos de viabilidade** – projectos de maior escala conseguem custos, mas para projectos pequenos tal não é viável
- Altas taxas de juro, custos de transacção, longos períodos de retorno e riscos de cre (percepção) associadas a investimentos em energia sustentável
- Dispersão de mecanismos de apoio (nacional e Europeu) e falta de abordagem integrada
- Complexidade de preparação de candidaturas a mecanismos de apoio

C I T i Z E E **GO PARITY**

www.pontoenergia.pt

Desativar mudo Interromper Vídeo Participantes Bate-papo Compartilhar tela Gravar Reações Sair

Links to media articles, programs etc.

The Facebook post is from 'GoParity - Impact Investing' (7,593 seguidores). It features a light blue header with the text 'O Ponto Energia é uma plataforma online que conecta investidores, promotores e especialistas que querem participar em projetos de eficiência energética.' Below this is a large image for a 'Webinar' titled 'Ponto Energia e CitizEE Balcão único para a eficiência energética'. The image includes logos for Ponto Energia, CitizEE, and Zoom, along with the date and time '21 de abril, 15h00 - 16h30'. At the bottom of the post, it says 'Ponto Energia e CitizEE – balcão único para a eficiência energética' and 'forms.office.com'. Interaction buttons for 'Gostei', 'Comentar', 'Compartilhar', and 'Enviar' are visible.

GoParity - Impact Investing
7,593 seguidores
9 h · 🌐

💡 O Ponto Energia é uma plataforma online que conecta investidores, promotores e especialistas que querem participar em projetos de eficiência energética. ...ver mais

Webinar
Ponto Energia e CitizEE
Balcão único para a eficiência energética
Plataforma de investimento, boas práticas no setor público e um caso de estudo em comunidade de energia.

21 de abril, 15h00 - 16h30

Ponto Energia e CitizEE – balcão único para a eficiência energética
forms.office.com

👍 Gostei 💬 Comentar ➡️ Compartilhar ➡️ Enviar

This Facebook post is also from 'GoParity - Impact Investing' (7,593 seguidores). It contains the same introductory text as the previous post. Below, it describes 'O CitizEE' as a European project involving citizens in energy efficiency. It then announces a webinar organized by GoParity in Portuguese, detailing the agenda for April 21st. The agenda includes a welcome and introduction at 15:00, a presentation of the Ponto Energia platform at 15:05, a discussion on public administration efficiency at 15:25, a presentation of the CitizEE platform at 15:40, a case study on collaborative financing at 16:00, a Q&A session at 16:15, and a closing at 16:30. The post concludes with a registration link and several hashtags related to sustainable energy and webinars.

GoParity - Impact Investing
7,593 seguidores
9 h · 🌐

💡 O Ponto Energia é uma plataforma online que conecta investidores, promotores e especialistas que querem participar em projetos de eficiência energética.

🌐 O CitizEE é um projeto europeu que pretende envolver os cidadãos no financiamento a projetos de eficiência energética.

📅 A GoParity, enquanto promotora do projeto, organiza hoje um webinar em Português em que será apresentado o seu modelo de funcionamento, boas práticas no setor público e um caso de estudo em comunidades de energia (em parceria com a Cleanwatts, a quem muito agradecemos a participação!).

📅 A Agenda de hoje, dia 21/04:

15:00 | Luis Couto | GoParity | Boas Vindas e Introdução
15:05 | Manuel Nery Nina | GoParity | "Ponto Energia – balcão único para a eficiência energética"
15:25 | Gorete Benvinda Soares | ADENE | "Promoção da Eficiência Energética na Administração Pública através do ECO.AP 2030"
15:40 | Luis Couto | GoParity | "CitizEE meets Ponto Energia – plataforma de investimento para a eficiência energética"
16:00 | Maria Benquerena | Cleanwatts | "Caso de Estudo: Financiamento Colaborativo em Comunidade de Energia"
16:15 | Q&A
16:30 | Encerramento

Registe-se aqui 📍
<https://lnkd.in/esiwprDQ>
#webinar #webinarsgratuitos #energiasolar #comunidadesdeenergia #investimentosustentaveis #sustentabilidadenergetica #webinarsforfree #freewebinars #europeanprojects

6. Conclusion

The exploitation events were held in front of relevant national audiences reaching more than 150 participants, in one case the event was held over two days. The first event was held in October 2021 in Croatia, the last in April 2022 in Portugal. With in total more than 150 participants, the highest single participation being just under 70 for one event, each of the dissemination activities reached a relevant group of national and EU level stakeholders and engaged in discussions on citizen finance possibilities.

With all four activities still ongoing and to be continued after the EC funding further lessons will be drawn and can be shared in further dissemination activities. This will be significant as the implementation of the pilots was delayed by regulatory uncertainties and the Covid pandemic. Through the current dissemination actions, however, each pilot was able to engage on national level and build relevant contacts to be exploited going forward.

The innovative financing mechanism developed by CitizEE show in national context how citizen financing schemes can be integrated with Public Financing Instruments. The exploitation events disseminated relevant lessons learned, both positive and negative, for considering a sound financial and operational environment to attract citizen private investments and to use public funds more effectively, enhancing capacity and know-how of public authorities, local stakeholders while stimulating required investment towards higher renovation rates and thus a more efficient building stock