



EUROPEAN CLIMATE, INFRASTRUCTURE AND ENVIRONMENT EXECUTIVE AGENCY (CINEA)

CINEA.D – Natural resources, climate, sustainable blue economy and clean energy
D.1 – LIFE Energy + LIFE Climate

GRANT AGREEMENT

Project 101167708 — LIFE23-CET-CROSSFIT

PREAMBLE

This **Agreement** ('the Agreement') is **between** the following parties:

on the one part,

the **European Climate, Infrastructure and Environment Executive Agency (CINEA)** ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and

on the other part,

1. 'the coordinator':

JOULE ASSETS EUROPE SRL (JAE), PIC 896100357, established in AVENUE KERSBEEK 308, BRUXELLES 1180, Belgium,

and the following other beneficiaries, if they sign their 'accession form' (see Annex 3 and Article 40):

2. **ENERSAVE CAPITAL SARL (ESC)**, PIC 907085219, established in RUE NOTRE DAME 31, LUXEMBOURG 2240, Luxembourg,

3. **VLAAMS ENERGIEBEDRIJF (VEB)**, PIC 905466774, established in HAVENLAAN 88, Brussel 1000, Belgium,

4. **SUSTAINABLE ENERGY FINANCE ASSOCIATION (SEFA)**, PIC 881517571, established in AVENUE KERSBEEK 308, BRUXELLES 1180, Belgium,

5. **RDA - CLIMATE SOLUTIONS UNIPessoal LDA (RDA)**, PIC 939071454, established in RUA ANTERO DE QUENTAL 10, OVAR 3880-148, Portugal,

6. **DIKTYO POLEON GIA TI VIOSIMI ANAPTYXI KAI KYKLIKI OIKONOMIA (SCN)**, PIC 907509788, established in GOUNARI DIMITRIOU 25, GLYFADA 165 62, Greece,

7. **ENERGIES RENOVABLES PUBLIQUES DE CATALUNYA SAU (ENER)**, PIC 880717612, established in CARRER DEL FOC, 57, BARCELONA 08038, Spain,

Unless otherwise specified, references to 'beneficiary' or 'beneficiaries' include the coordinator and affiliated entities (if any).

If only one beneficiary signs the grant agreement ('mono-beneficiary grant'), all provisions referring to the 'coordinator' or the 'beneficiaries' will be considered — mutatis mutandis — as referring to the beneficiary.

The parties referred to above have agreed to enter into the Agreement.

By signing the Agreement and the accession forms, the beneficiaries accept the grant and agree to implement the action under their own responsibility and in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

The Agreement is composed of:

Preamble

Terms and Conditions (including Data Sheet)

Annex 1 Description of the action¹

Annex 2 Estimated budget for the action

Annex 2a Additional information on unit costs and contributions (if applicable)

Annex 3 Accession forms (if applicable)²

Annex 3a Declaration on joint and several liability of affiliated entities (if applicable)³

Annex 4 Model for the financial statements

Annex 5 Specific rules (if applicable)

¹ Template published on [Portal Reference Documents](#).

² Template published on [Portal Reference Documents](#).

³ Template published on [Portal Reference Documents](#).

TERMS AND CONDITIONS

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DATA SHEET

1. General data

Project summary:

Project summary
<p>CROSSFIT's overarching objective is to transform energy efficiency market dynamics by introducing a game-changing approach: with the set-up of a one-stop shop in the public sector, where complexities in procurement are simplified, and opportunities are seized. Our primary goal is to streamline decision-making, centralize tender procedures at the municipal, regional, and national levels, and captivate the private financial community's active participation. The EU's mandatory tendering process in the public sector procurement process poses a bottleneck to the energy transition, while at the same time the public sector is intended to lead by example. CROSSFIT aims to address these challenges, by establishing a "one-stop shop" (OSS) in Greece, Portugal and Spain, modeled after the public sector held Vlaams Energiebedrijf's (VEB) OSS, operating in Belgium since 2004, and successfully remedying to the issues in the public procurement process. Adapting the VEB OSS model to the legal and regulatory frameworks of Greece, Portugal and Spain, the CROSSFIT model will be applied to shortlisted pilot sites in the respective countries. Furthermore the present VEB model will be upgraded by integrating financial engineering in blending public and private capital, which will also be tested on shortlisted pilots, and evolve into VEB 2.0. In the final phase of crOSSfit, the VEB 2.0 model will be introduced to the OSS in Greece, Portugal and Spain, creating four advanced OSS 2.0 as regional replication templates. Results will be replicated by pilot leaders themselves and taken to a wider European market by SEFA, the Brussels-based Sustainable Energy Finance Association. SEFA as an not-for-profit organisation will take on the CROSSFIT collateral, build capacity and further deploy the CROSSFIT model in other EU MS, leading to €3 billion capital deployment within 5 years after the project end, and notable CO2 abatement.</p>

Keywords:

- one-stop shop, energy efficiency, public administration, innovative financing, public buildings

Project number: 101167708

Project name: Continental Replicable One Stop Shop for Financial Innovation Trajectories

Project acronym: LIFE23-CET-CROSSFIT

Call: LIFE-2023-CET

Topic: LIFE-2023-CET-OSS

Type of action: LIFE Project Grants

Granting authority: European Climate, Infrastructure and Environment Executive Agency

Grant managed through EU Funding & Tenders Portal: Yes (eGrants)

Project starting date: fixed date: 1 September 2024

Project end date: 28 February 2027

Project duration: 30 months

Consortium agreement: Yes

2. Participants

List of participants:

N°	Role	Short name	Legal name	Ctry	PIC	Total eligible costs (BEN and AE)	Max grant amount
1	COO	JAE	JOULE ASSETS EUROPE SRL	BE	896100357	128 841.91	122 399.81
1.1	AE	JAEG	JOULE ASSETS EUROPE GROUP SRL	IT	912406445	115 852.11	110 059.50
2	BEN	ESC	ENERSAVE CAPITAL SARL	LU	907085219	333 037.50	316 385.63
3	BEN	VEB	VLAAMS ENERGIEBEDRIJF	BE	905466774	239 412.50	227 441.88

N°	Role	Short name	Legal name	Ctry	PIC	Total eligible costs (BEN and AE)	Max grant amount
4	BEN	SEFA	SUSTAINABLE ENERGY FINANCE ASSOCIATION	BE	881517571	215 070.00	204 316.50
5	BEN	RDA	RDA - CLIMATE SOLUTIONS UNIPessoal LDA	PT	939071454	186 180.00	176 871.00
6	BEN	SCN	DIKTYO POLEON GIA TI VIOSIMI ANAPTYXI KAI KYKLIKI OIKONOMIA	EL	907509788	177 620.00	168 739.00
7	BEN	ENER	ENERGIES RENOVABLES PUBLIQUES DE CATALUNYA SAU	ES	880717612	182 145.03	173 037.78
Total						1 578 159.05	1 499 251.10

Coordinator:

- JOULE ASSETS EUROPE SRL (JAE)

3. Grant

Maximum grant amount, total estimated eligible costs and contributions and funding rate:

Total eligible costs (BEN and AE)	Funding rate (%)	Maximum grant amount (Annex 2)	Maximum grant amount (award decision)
1 578 159.05	95	1 499 251.10	1 499 251.10

Grant form: Budget-based

Grant mode: Action grant

Budget categories/activity types:

- A. Personnel costs
 - A.1 Employees, A.2 Natural persons under direct contract, A.3 Seconded persons
 - A.4 SME owners and natural person beneficiaries
 - A.5 Volunteers
- B. Subcontracting costs
- C. Purchase costs
 - C.1 Travel and subsistence
 - C.2 Equipment
 - C.3 Other goods, works and services
- D. Other cost categories
 - D.1 Financial support to third parties
 - D.2 Land purchase
- E. Indirect costs

Cost eligibility options:

- Standard supplementary payments
- Limitation for subcontracting
- Travel and subsistence:
 - Travel: Actual costs
 - Accommodation: Actual costs
 - Subsistence: Actual costs

- Equipment: depreciation only
- Costs for providing financial support to third parties (actual cost; max amount for each recipient: EUR 0.00)
- Indirect cost flat-rate: 7% of the eligible direct costs (categories A-D, except volunteers costs and exempted specific cost categories, if any)
- VAT: Yes
- Other ineligible costs

Budget flexibility: Yes (no flexibility cap)

4. Reporting, payments and recoveries

4.1 Continuous reporting (art 21)

Deliverables: see Funding & Tenders Portal Continuous Reporting tool

4.2 Periodic reporting and payments

Reporting and payment schedule (art 21, 22):

Reporting					Payments	
Reporting periods			Type	Deadline	Type	Deadline (time to pay)
RP No	Month from	Month to				
					Initial prefinancing	30 days from entry into force/ financial guarantee (if required) – whichever is the latest
					Additional prefinancing	60 days from receiving additional prefinancing report/ financial guarantee (if required) – whichever is the latest
1	1	16	Additional prefinancing report	60 days after end of reporting period	Additional prefinancing	60 days from receiving additional prefinancing report/ financial guarantee (if required) – whichever is the latest
2	17	30	Periodic report	60 days after end of reporting period	Final payment	90 days from receiving periodic report

Prefinancing payments and guarantees:

Prefinancing payment		Prefinancing guarantee		
Type	Amount	Guarantee amount	Division per participant	
Prefinancing 1 (initial)	449 775.33	n/a	1 - JAE	n/a
			1.1 - JAEG	n/a
			2 - ESC	n/a
			3 - VEB	n/a
			4 - SEFA	n/a
			5 - RDA	n/a
			6 - SCN	n/a
			7 - ENER	n/a

Prefinancing payment		Prefinancing guarantee		
Type	Amount	Guarantee amount	Division per participant	
Prefinancing 2 (additional)	749 625.55	n/a	1 - JAE	n/a
			1.1 - JAEG	n/a
			2 - ESC	n/a
			3 - VEB	n/a
			4 - SEFA	n/a
			5 - RDA	n/a
			6 - SCN	n/a
			7 - ENER	n/a

Reporting and payment modalities (art 21, 22):

Mutual Insurance Mechanism (MIM): No

Restrictions on distribution of initial prefinancing: The prefinancing may be distributed only if the minimum number of beneficiaries set out in the call conditions (if any) have acceded to the Agreement and only to beneficiaries that have acceded.

Interim payment ceiling (if any): 90% of the maximum grant amount

No-profit rule: Yes

Late payment interest: ECB + 3.5%

Bank account for payments:

BE24363115216438 BBRUBEBB

Conversion into euros: Double conversion

Reporting language: Language of the Agreement

4.3 Certificates (art 24):

Certificates on the financial statements (CFS):

Conditions:

Schedule: interim/final payment, if threshold is reached

Standard threshold (beneficiary-level):

- financial statement: requested EU contribution to costs \geq EUR 500 000.00

4.4 Recoveries (art 22)**First-line liability for recoveries:**

Beneficiary termination: Beneficiary concerned

Final payment: Coordinator

After final payment: Beneficiary concerned

Joint and several liability for enforced recoveries (in case of non-payment):

Limited joint and several liability of other beneficiaries — up to the maximum grant amount of the beneficiary

Joint and several liability of affiliated entities — n/a

5. Consequences of non-compliance, applicable law & dispute settlement forum

Applicable law (art 43):

Standard applicable law regime: EU law + law of Belgium

Dispute settlement forum (art 43):

Standard dispute settlement forum:

EU beneficiaries: EU General Court + EU Court of Justice (on appeal)

Non-EU beneficiaries: Courts of Brussels, Belgium (unless an international agreement provides for the enforceability of EU court judgements)

6. Other

Specific rules (Annex 5): Yes

Standard time-limits after project end:

Confidentiality (for X years after final payment): 5

Record-keeping (for X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Reviews (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Audits (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Extension of findings from other grants to this grant (no later than X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Impact evaluation (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

CHAPTER 1 GENERAL

ARTICLE 1 — SUBJECT OF THE AGREEMENT

This Agreement sets out the rights and obligations and terms and conditions applicable to the grant awarded for the implementation of the action set out in Chapter 2.

ARTICLE 2 — DEFINITIONS

For the purpose of this Agreement, the following definitions apply:

Actions — The project which is being funded in the context of this Agreement.

Grant — The grant awarded in the context of this Agreement.

EU grants — Grants awarded by EU institutions, bodies, offices or agencies (including EU executive agencies, EU regulatory agencies, EDA, joint undertakings, etc.).

Participants — Entities participating in the action as beneficiaries, affiliated entities, associated partners, third parties giving in-kind contributions, subcontractors or recipients of financial support to third parties.

Beneficiaries (BEN) — The signatories of this Agreement (either directly or through an accession form).

Affiliated entities (AE) — Entities affiliated to a beneficiary within the meaning of Article 187 of EU Financial Regulation 2018/1046⁴ which participate in the action with similar rights and obligations as the beneficiaries (obligation to implement action tasks and right to charge costs and claim contributions).

Associated partners (AP) — Entities which participate in the action, but without the right to charge costs or claim contributions.

Purchases — Contracts for goods, works or services needed to carry out the action (e.g. equipment, consumables and supplies) but which are not part of the action tasks (see Annex 1).

Subcontracting — Contracts for goods, works or services that are part of the action tasks (see Annex 1).

In-kind contributions — In-kind contributions within the meaning of Article 2(36) of EU Financial

⁴ For the definition, see Article 187 Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 ('EU Financial Regulation') (OJ L 193, 30.7.2018, p. 1): "**affiliated entities** [are]:

- (a) entities that form a sole beneficiary [(i.e. where an entity is formed of several entities that satisfy the criteria for being awarded a grant, including where the entity is specifically established for the purpose of implementing an action to be financed by a grant)];
- (b) entities that satisfy the eligibility criteria and that do not fall within one of the situations referred to in Article 136(1) and 141(1) and that have a link with the beneficiary, in particular a legal or capital link, which is neither limited to the action nor established for the sole purpose of its implementation".

Regulation 2018/1046, i.e. non-financial resources made available free of charge by third parties.

Fraud — Fraud within the meaning of Article 3 of EU Directive 2017/1371⁵ and Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995⁶, as well as any other wrongful or criminal deception intended to result in financial or personal gain.

Irregularities — Any type of breach (regulatory or contractual) which could impact the EU financial interests, including irregularities within the meaning of Article 1(2) of EU Regulation 2988/95⁷.

Grave professional misconduct — Any type of unacceptable or improper behaviour in exercising one's profession, especially by employees, including grave professional misconduct within the meaning of Article 136(1)(c) of EU Financial Regulation 2018/1046.

Applicable EU, international and national law — Any legal acts or other (binding or non-binding) rules and guidance in the area concerned.

Portal — EU Funding & Tenders Portal; electronic portal and exchange system managed by the European Commission and used by itself and other EU institutions, bodies, offices or agencies for the management of their funding programmes (grants, procurements, prizes, etc.).

CHAPTER 2 ACTION

ARTICLE 3 — ACTION

The grant is awarded for the action **101167708 — LIFE23-CET-CROSSFIT** ('action'), as described in Annex 1.

ARTICLE 4 — DURATION AND STARTING DATE

The duration and the starting date of the action are set out in the Data Sheet (see Point 1).

CHAPTER 3 GRANT

ARTICLE 5 — GRANT

5.1 Form of grant

⁵ Directive (EU) 2017/1371 of the European Parliament and of the Council of 5 July 2017 on the fight against fraud to the Union's financial interests by means of criminal law (OJ L 198, 28.7.2017, p. 29).

⁶ OJ C 316, 27.11.1995, p. 48.

⁷ Council Regulation (EC, Euratom) No 2988/95 of 18 December 1995 on the protection of the European Communities financial interests (OJ L 312, 23.12.1995, p. 1).

The grant is an action grant⁸ which takes the form of a budget-based mixed actual cost grant (i.e. a grant based on actual costs incurred, but which may also include other forms of funding, such as unit costs or contributions, flat-rate costs or contributions, lump sum costs or contributions or financing not linked to costs).

5.2 Maximum grant amount

The maximum grant amount is set out in the Data Sheet (see Point 3) and in the estimated budget (Annex 2).

5.3 Funding rate

The funding rate for costs is 95% of the action's eligible costs.

Contributions are not subject to any funding rate.

5.4 Estimated budget, budget categories and forms of funding

The estimated budget for the action is set out in Annex 2.

It contains the estimated eligible costs and contributions for the action, broken down by participant and budget category.

Annex 2 also shows the types of costs and contributions (forms of funding)⁹ to be used for each budget category.

If unit costs or contributions are used, the details on the calculation will be explained in Annex 2a.

5.5 Budget flexibility

The budget breakdown may be adjusted — without an amendment (see Article 39) — by transfers (between participants and budget categories), as long as this does not imply any substantive or important change to the description of the action in Annex 1.

However:

- changes to the budget category for volunteers (if used) always require an amendment
- changes to budget categories with lump sums costs or contributions (if used; including financing not linked to costs) always require an amendment
- changes to budget categories with higher funding rates or budget ceilings (if used) always require an amendment
- addition of amounts for subcontracts not provided for in Annex 1 either require an amendment or simplified approval in accordance with Article 6.2

⁸ For the definition, see Article 180(2)(a) EU Financial Regulation 2018/1046: ‘**action grant**’ means an EU grant to finance “an action intended to help achieve a Union policy objective”.

⁹ See Article 125 EU Financial Regulation 2018/1046.

- other changes require an amendment or simplified approval, if specifically provided for in Article 6.2
- flexibility caps: not applicable.

ARTICLE 6 — ELIGIBLE AND INELIGIBLE COSTS AND CONTRIBUTIONS

In order to be eligible, costs and contributions must meet the **eligibility** conditions set out in this Article.

6.1 General eligibility conditions

The **general eligibility conditions** are the following:

(a) for actual costs:

- (i) they must be actually incurred by the beneficiary
- (ii) they must be incurred in the period set out in Article 4 (with the exception of costs relating to the submission of the final periodic report, which may be incurred afterwards; see Article 21)
- (iii) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
- (iv) they must be incurred in connection with the action as described in Annex 1 and necessary for its implementation
- (v) they must be identifiable and verifiable, in particular recorded in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's usual cost accounting practices
- (vi) they must comply with the applicable national law on taxes, labour and social security and
- (vii) they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency

(b) for unit costs or contributions (if any):

- (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
- (ii) the units must:
 - be actually used or produced by the beneficiary in the period set out in Article 4 (with the exception of units relating to the submission of the final periodic report, which may be used or produced afterwards; see Article 21)
 - be necessary for the implementation of the action and
- (iii) the number of units must be identifiable and verifiable, in particular supported by records and documentation (see Article 20)

(c) for flat-rate costs or contributions (if any):

- (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
- (ii) the costs or contributions to which the flat-rate is applied must:
 - be eligible
 - relate to the period set out in Article 4 (with the exception of costs or contributions relating to the submission of the final periodic report, which may be incurred afterwards; see Article 21)

(d) for lump sum costs or contributions (if any):

- (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
- (ii) the work must be properly implemented by the beneficiary in accordance with Annex 1
- (iii) the deliverables/outputs must be achieved in the period set out in Article 4 (with the exception of deliverables/outputs relating to the submission of the final periodic report, which may be achieved afterwards; see Article 21)

(e) for unit, flat-rate or lump sum costs or contributions according to usual cost accounting practices (if any):

- (i) they must fulfil the general eligibility conditions for the type of cost concerned
- (ii) the cost accounting practices must be applied in a consistent manner, based on objective criteria, regardless of the source of funding

(f) for financing not linked to costs (if any): the results must be achieved or the conditions must be fulfilled as described in Annex 1.

In addition, for direct cost categories (e.g. personnel, travel & subsistence, subcontracting and other direct costs) only costs that are directly linked to the action implementation and can therefore be attributed to it directly are eligible. They must not include any indirect costs (i.e. costs that are only indirectly linked to the action, e.g. via cost drivers).

6.2 Specific eligibility conditions for each budget category

For each budget category, the **specific eligibility conditions** are as follows:

Direct costs

A. Personnel costs

A.1 Costs for employees (or equivalent) are eligible as personnel costs if they fulfil the general eligibility conditions and are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action.

They must be limited to salaries, social security contributions, taxes and other costs linked to the

remuneration, if they arise from national law or the employment contract (or equivalent appointing act) and be calculated on the basis of the costs actually incurred, in accordance with the following method:

{daily rate for the person
multiplied by
number of day-equivalents worked on the action (rounded up or down to the nearest half-day)}.

The daily rate must be calculated as:

{annual personnel costs for the person
divided by
215}.

The number of day-equivalents declared for a person must be identifiable and verifiable (see Article 20).

The total number of day-equivalents declared in EU grants, for a person for a year, cannot be higher than 215.

The personnel costs may also include supplementary payments for personnel assigned to the action (including payments on the basis of supplementary contracts regardless of their nature), if:

- it is part of the beneficiary's usual remuneration practices and is paid in a consistent manner whenever the same kind of work or expertise is required
- the criteria used to calculate the supplementary payments are objective and generally applied by the beneficiary, regardless of the source of funding used.

A.2 and A.3 Costs for natural persons working under a direct contract other than an employment contract and costs for **seconded persons by a third party against payment** are also eligible as personnel costs, if they are assigned to the action, fulfil the general eligibility conditions and:

- (a) work under conditions similar to those of an employee (in particular regarding the way the work is organised, the tasks that are performed and the premises where they are performed) and
- (b) the result of the work belongs to the beneficiary (unless agreed otherwise).

They must be calculated on the basis of a rate which corresponds to the costs actually incurred for the direct contract or secondment and must not be significantly different from those for personnel performing similar tasks under an employment contract with the beneficiary.

A.4 The work of SME owners for the action (i.e. owners of beneficiaries that are small and medium-sized enterprises¹⁰ not receiving a salary) or **natural person beneficiaries** (i.e. beneficiaries that are

¹⁰ For the definition, see Commission Recommendation 2003/361/EC: micro, small or medium-sized enterprise (SME) are enterprises

- engaged in an economic activity, irrespective of their legal form (including, in particular, self-employed persons and family businesses engaged in craft or other activities, and partnerships or associations regularly engaged in an economic activity) and

natural persons not receiving a salary) may be declared as personnel costs, if they fulfil the general eligibility conditions and are calculated as unit costs in accordance with the method set out in Annex 2a.

A.5 The work of **volunteers** for the action (i.e. persons who freely work for an organisation, on a non-compulsory basis and without being paid) may be declared as personnel costs, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions and are calculated as unit costs in accordance with the method set out in Annex 2a.

They:

- may not exceed the maximum amount for volunteers for the action (which corresponds to 50% of the total (ineligible and eligible) project costs and contributions estimated in the proposal)
- may not exceed the maximum amount for volunteers for each beneficiary set out in Annex 2
- may not make the maximum EU contribution to costs higher than the total eligible costs without volunteers.

If also indirect costs for volunteers are declared eligible in the call conditions, the amount of indirect costs may be added to the volunteers costs category in Annex 2, at the flat-rate set out in Point E.

B. Subcontracting costs

Subcontracting costs for the action (including related duties, taxes and charges, such as non-deductible or non-refundable value added tax (VAT)) are eligible, if they are calculated on the basis of the costs actually incurred, fulfil the general eligibility conditions and are awarded using the beneficiary's usual purchasing practices — provided these ensure subcontracts with best value for money (or if appropriate the lowest price) and that there is no conflict of interests (see Article 12).

Beneficiaries that are 'contracting authorities/entities' within the meaning of the EU Directives on public procurement must also comply with the applicable national law on public procurement.

Subcontracting may cover only a limited part of the action.

The tasks to be subcontracted and the estimated cost for each subcontract must be set out in Annex 1 and the total estimated costs of subcontracting per beneficiary must be set out in Annex 2 (or may be approved ex post in the periodic report, if the use of subcontracting does not entail changes to the Agreement which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants; 'simplified approval procedure').

C. Purchase costs

Purchase costs for the action (including related duties, taxes and charges, such as non-deductible or non-refundable value added tax (VAT)) are eligible if they fulfil the general eligibility conditions and are bought using the beneficiary's usual purchasing practices — provided these ensure purchases with

-
- employing fewer than 250 persons (expressed in 'annual working units' as defined in Article 5 of the Recommendation) and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.

best value for money (or if appropriate the lowest price) and that there is no conflict of interests (see Article 12).

Beneficiaries that are ‘contracting authorities/entities’ within the meaning of the EU Directives on public procurement must also comply with the applicable national law on public procurement.

C.1 Travel and subsistence

Purchases for **travel, accommodation and subsistence** must be calculated as follows:

- travel: on the basis of the costs actually incurred and in line with the beneficiary’s usual practices on travel
- accommodation: on the basis of the costs actually incurred and in line with the beneficiary’s usual practices on travel
- subsistence: on the basis of the costs actually incurred and in line with the beneficiary’s usual practices on travel .

C.2 Equipment

Purchases of **equipment, infrastructure or other assets** used for the action must be declared as depreciation costs, calculated on the basis of the costs actually incurred and written off in accordance with international accounting standards and the beneficiary’s usual accounting practices.

Only the portion of the costs that corresponds to the rate of actual use for the action during the action duration can be taken into account.

Costs for **renting or leasing** equipment, infrastructure or other assets are also eligible, if they do not exceed the depreciation costs of similar equipment, infrastructure or assets and do not include any financing fees.

C.3 Other goods, works and services

Purchases of **other goods, works and services** must be calculated on the basis of the costs actually incurred.

Such goods, works and services include, for instance, consumables and supplies, promotion, dissemination, protection of results, translations, publications, certificates and financial guarantees, if required under the Agreement.

D. Other cost categories

D.1 Financial support to third parties

Costs for providing financial support to third parties (in the form of **grants, prizes** or similar forms of support; if any) are eligible, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions, are calculated on the basis of the costs actually incurred and the support is implemented in accordance with the conditions set out in Annex 1.

These conditions must ensure objective and transparent selection procedures and include at least the following:

(a) for grants (or similar):

- (i) the maximum amount of financial support for each third party ('recipient'); this amount may not exceed the amount set out in the Data Sheet (see Point 3) or otherwise agreed with the granting authority
- (ii) the criteria for calculating the exact amount of the financial support
- (iii) the different types of activity that qualify for financial support, on the basis of a closed list
- (iv) the persons or categories of persons that will be supported and
- (v) the criteria and procedures for giving financial support

(b) for prizes (or similar):

- (i) the eligibility and award criteria
- (ii) the amount of the prize and
- (iii) the payment arrangements.

D.2 Land purchase

Costs for land purchase from private entities (or long-term lease of land or one-off compensations for land use rights) are eligible, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions, are calculated on the basis of the costs actually incurred and:

- (a) the purchase will contribute to improving, maintaining and restoring the integrity of the Natura 2000 network set up pursuant to Article 3 of Directive 92/43/EEC, including through improving connectivity by the creation of corridors, stepping stones, or other elements of green infrastructure
- (b) land purchase is the only or most cost-effective way of achieving the desired conservation outcome
- (c) the land purchased is reserved in the long term for uses consistent with the specific objectives of the LIFE Programme
- (d) the Member State concerned ensures, by way of transfer or otherwise, the long-term assignment of such land to nature conservation purposes and the beneficiary documents this by ensuring that:
 - (i) the entry into the land register includes a condition that the land will be assigned definitively to nature conservation
 - (ii) or, if there is no land register or such a condition is not possible under national law, that such a condition is either included in the land sale contract or guaranteed by equivalent means
- (e) for land purchases by private entity beneficiaries: the beneficiaries ensure the long-term conservation by ensuring that:

- (i) the entry into the land register includes a condition that, in case of their dissolution or incapacity to manage the land according to nature conservation requirements, the property will be transferred to an entity primarily active in the field of nature protection
- (ii) or, if there is no land register or such a condition is not possible under national law, that such a condition is either included in the land sale contract or guaranteed by equivalent means
- (f) for purchases of partial rights: the entry into the land register duly reflects the long-term nature conservation objectives and the requirements set out in this Article
- (g) for land purchased to be exchanged at a later date for another parcel on which the action will be undertaken: the exchange is carried out before the end of the action and the land exchanged complies with the requirements set out in this Article
- (h) for long-term leases: the lease is of at least 20 years and includes provisions and commitments that ensure the achievement of its objectives in terms of habitat and species protection.

This cost will not be taken into account for the indirect cost flat-rate.

Indirect costs

E. Indirect costs

Indirect costs will be reimbursed at the flat-rate of 7% of the eligible direct costs (categories A-D, except volunteers costs and exempted specific cost categories, if any).

Contributions

Not applicable

6.3 Ineligible costs and contributions

The following costs or contributions are **ineligible**:

- (a) costs or contributions that do not comply with the conditions set out above (Article 6.1 and 6.2), in particular:
 - (i) costs related to return on capital and dividends paid by a beneficiary
 - (ii) debt and debt service charges
 - (iii) provisions for future losses or debts
 - (iv) interest owed
 - (v) currency exchange losses
 - (vi) bank costs charged by the beneficiary's bank for transfers from the granting authority
 - (vii) excessive or reckless expenditure

- (viii) deductible or refundable VAT (including VAT paid by public bodies acting as public authority)
- (ix) costs incurred or contributions for activities implemented during grant agreement suspension (see Article 31)
- (x) in-kind contributions by third parties
- (b) costs or contributions declared under other EU grants (or grants awarded by an EU Member State, non-EU country or other body implementing the EU budget), except for the following cases:
 - (i) Synergy actions: not applicable
 - (ii) if the action grant is combined with an operating grant¹¹ running during the same period and the beneficiary can demonstrate that the operating grant does not cover any (direct or indirect) costs of the action grant
- (c) costs or contributions for staff of a national (or regional/local) administration, for activities that are part of the administration's normal activities (i.e. not undertaken only because of the grant)
- (d) costs or contributions (especially travel and subsistence) for staff or representatives of EU institutions, bodies or agencies
- (e) other :
 - (i) country restrictions for eligible costs: not applicable
 - (ii) costs or contributions declared specifically ineligible in the call conditions.

6.4 Consequences of non-compliance

If a beneficiary declares costs or contributions that are ineligible, they will be rejected (see Article 27).

This may also lead to other measures described in Chapter 5.

CHAPTER 4 GRANT IMPLEMENTATION

SECTION 1 CONSORTIUM: BENEFICIARIES, AFFILIATED ENTITIES AND OTHER PARTICIPANTS

ARTICLE 7 — BENEFICIARIES

The beneficiaries, as signatories of the Agreement, are fully responsible towards the granting authority for implementing it and for complying with all its obligations.

¹¹ For the definition, see Article 180(2)(b) of EU Financial Regulation 2018/1046: ‘**operating grant**’ means an EU grant to finance “the functioning of a body which has an objective forming part of and supporting an EU policy”.

They must implement the Agreement to their best abilities, in good faith and in accordance with all the obligations and terms and conditions it sets out.

They must have the appropriate resources to implement the action and implement the action under their own responsibility and in accordance with Article 11. If they rely on affiliated entities or other participants (see Articles 8 and 9), they retain sole responsibility towards the granting authority and the other beneficiaries.

They are jointly responsible for the *technical* implementation of the action. If one of the beneficiaries fails to implement their part of the action, the other beneficiaries must ensure that this part is implemented by someone else (without being entitled to an increase of the maximum grant amount and subject to an amendment; see Article 39). The *financial* responsibility of each beneficiary in case of recoveries is governed by Article 22.

The beneficiaries (and their action) must remain eligible under the EU programme funding the grant for the entire duration of the action. Costs and contributions will be eligible only as long as the beneficiary and the action are eligible.

The **internal roles and responsibilities** of the beneficiaries are divided as follows:

(a) Each beneficiary must:

- (i) keep information stored in the Portal Participant Register up to date (see Article 19)
- (ii) inform the granting authority (and the other beneficiaries) immediately of any events or circumstances likely to affect significantly or delay the implementation of the action (see Article 19)
- (iii) submit to the coordinator in good time:
 - the prefinancing guarantees (if required; see Article 23)
 - the financial statements and certificates on the financial statements (CFS) (if required; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
 - the contribution to the deliverables and technical reports (see Article 21)
 - any other documents or information required by the granting authority under the Agreement
- (iv) submit via the Portal data and information related to the participation of their affiliated entities.

(b) The coordinator must:

- (i) monitor that the action is implemented properly (see Article 11)
- (ii) act as the intermediary for all communications between the consortium and the granting authority, unless the Agreement or granting authority specifies otherwise, and in particular:
 - submit the prefinancing guarantees to the granting authority (if any)

- request and review any documents or information required and verify their quality and completeness before passing them on to the granting authority
 - submit the deliverables and reports to the granting authority
 - inform the granting authority about the payments made to the other beneficiaries (report on the distribution of payments; if required, see Articles 22 and 32)
- (iii) distribute the payments received from the granting authority to the other beneficiaries without unjustified delay (see Article 22).

The coordinator may not delegate or subcontract the above-mentioned tasks to any other beneficiary or third party (including affiliated entities).

However, coordinators which are public bodies may delegate the tasks set out in Point (b)(ii) last indent and (iii) above to entities with ‘authorisation to administer’ which they have created or which are controlled by or affiliated to them. In this case, the coordinator retains sole responsibility for the payments and for compliance with the obligations under the Agreement.

Moreover, coordinators which are ‘sole beneficiaries’¹² (or similar, such as European research infrastructure consortia (ERICs)) may delegate the tasks set out in Point (b)(i) to (iii) above to one of their members. The coordinator retains sole responsibility for compliance with the obligations under the Agreement.

The beneficiaries must have **internal arrangements** regarding their operation and co-ordination, to ensure that the action is implemented properly.

If required by the granting authority (see Data Sheet, Point 1), these arrangements must be set out in a written **consortium agreement** between the beneficiaries, covering for instance:

- the internal organisation of the consortium
- the management of access to the Portal
- different distribution keys for the payments and financial responsibilities in case of recoveries (if any)
- additional rules on rights and obligations related to background and results (see Article 16)
- settlement of internal disputes
- liability, indemnification and confidentiality arrangements between the beneficiaries.

The internal arrangements must not contain any provision contrary to this Agreement.

ARTICLE 8 — AFFILIATED ENTITIES

¹² For the definition, see Article 187(2) EU Financial Regulation 2018/1046: “Where several entities satisfy the criteria for being awarded a grant and together form one entity, that entity may be treated as the **sole beneficiary**, including where it is specifically established for the purpose of implementing the action financed by the grant.”

The following entities which are linked to a beneficiary will participate in the action as ‘affiliated entities’:

- **JOULE ASSETS EUROPE GROUP SRL (JAEG)**, PIC 912406445, linked to JOULE ASSETS EUROPE SRL (JAE)

Affiliated entities can charge costs and contributions to the action under the same conditions as the beneficiaries and must implement the action tasks attributed to them in Annex 1 in accordance with Article 11.

Their costs and contributions will be included in Annex 2 and will be taken into account for the calculation of the grant.

The beneficiaries must ensure that all their obligations under this Agreement also apply to their affiliated entities.

The beneficiaries must ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the affiliated entities.

Breaches by affiliated entities will be handled in the same manner as breaches by beneficiaries. Recovery of undue amounts will be handled through the beneficiaries.

If the granting authority requires joint and several liability of affiliated entities (see Data Sheet, Point 4.4), they must sign the declaration set out in Annex 3a and may be held liable in case of enforced recoveries against their beneficiaries (see Article 22.2 and 22.4).

ARTICLE 9 — OTHER PARTICIPANTS INVOLVED IN THE ACTION

9.1 Associated partners

Not applicable

9.2 Third parties giving in-kind contributions to the action

Other third parties may give in-kind contributions to the action (i.e. personnel, equipment, other goods, works and services, etc. which are free-of-charge), if necessary for the implementation.

Third parties giving in-kind contributions do not implement any action tasks. They may not charge costs or contributions to the action and the costs for the in-kind contributions are not eligible.

The third parties and their in-kind contributions should be set out in Annex 1.

9.3 Subcontractors

Subcontractors may participate in the action, if necessary for the implementation.

Subcontractors must implement their action tasks in accordance with Article 11. The costs for the subcontracted tasks (invoiced price from the subcontractor) are eligible and may be charged by the beneficiaries, under the conditions set out in Article 6. The costs will be included in Annex 2 as part of the beneficiaries’ costs.

The beneficiaries must ensure that their contractual obligations under Articles 11 (proper

implementation), 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping) also apply to the subcontractors.

The beneficiaries must ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the subcontractors.

9.4 Recipients of financial support to third parties

If the action includes providing financial support to third parties (e.g. grants, prizes or similar forms of support), the beneficiaries must ensure that their contractual obligations under Articles 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping) also apply to the third parties receiving the support (recipients).

The beneficiaries must also ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the recipients.

ARTICLE 10 — PARTICIPANTS WITH SPECIAL STATUS

10.1 Non-EU participants

Participants which are established in a non-EU country (if any) undertake to comply with their obligations under the Agreement and:

- to respect general principles (including fundamental rights, values and ethical principles, environmental and labour standards, rules on classified information, intellectual property rights, visibility of funding and protection of personal data)
- for the submission of certificates under Article 24: to use qualified external auditors which are independent and comply with comparable standards as those set out in EU Directive 2006/43/EC¹³
- for the controls under Article 25: to allow for checks, reviews, audits and investigations (including on-the-spot checks, visits and inspections) by the bodies mentioned in that Article (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.).

Special rules on dispute settlement apply (see Data Sheet, Point 5).

10.2 Participants which are international organisations

Participants which are international organisations (IOs; if any) undertake to comply with their obligations under the Agreement and:

- to respect general principles (including fundamental rights, values and ethical principles, environmental and labour standards, rules on classified information, intellectual property rights, visibility of funding and protection of personal data)

¹³ Directive 2006/43/EC of the European Parliament and of the Council of 17 May 2006 on statutory audits of annual accounts and consolidated accounts or similar national regulations (OJ L 157, 9.6.2006, p. 87).

- for the submission of certificates under Article 24: to use either independent public officers or external auditors which comply with comparable standards as those set out in EU Directive 2006/43/EC
- for the controls under Article 25: to allow for the checks, reviews, audits and investigations by the bodies mentioned in that Article, taking into account the specific agreements concluded by them and the EU (if any).

For such participants, nothing in the Agreement will be interpreted as a waiver of their privileges or immunities, as accorded by their constituent documents or international law.

Special rules on applicable law and dispute settlement apply (see Article 43 and Data Sheet, Point 5).

10.3 Pillar-assessed participants

Pillar-assessed participants (if any) may rely on their own systems, rules and procedures, in so far as they have been positively assessed and do not call into question the decision awarding the grant or breach the principle of equal treatment of applicants or beneficiaries.

‘Pillar-assessment’ means a review by the European Commission on the systems, rules and procedures which participants use for managing EU grants (in particular internal control system, accounting system, external audits, financing of third parties, rules on recovery and exclusion, information on recipients and protection of personal data; see Article 154 EU Financial Regulation 2018/1046).

Participants with a positive pillar assessment may rely on their own systems, rules and procedures, in particular for:

- record-keeping (Article 20): may be done in accordance with internal standards, rules and procedures
- currency conversion for financial statements (Article 21): may be done in accordance with usual accounting practices
- guarantees (Article 23): for public law bodies, prefinancing guarantees are not needed
- certificates (Article 24):
 - certificates on the financial statements (CFS): may be provided by their regular internal or external auditors and in accordance with their internal financial regulations and procedures
 - certificates on usual accounting practices (CoMUC): are not needed if those practices are covered by an ex-ante assessment

and use the following specific rules, for:

- recoveries (Article 22): in case of financial support to third parties, there will be no recovery if the participant has done everything possible to retrieve the undue amounts from the third party receiving the support (including legal proceedings) and non-recovery is not due to an error or negligence on its part
- checks, reviews, audits and investigations by the EU (Article 25): will be conducted taking

into account the rules and procedures specifically agreed between them and the framework agreement (if any)

- impact evaluation (Article 26): will be conducted in accordance with the participant's internal rules and procedures and the framework agreement (if any)
- grant agreement suspension (Article 31): certain costs incurred during grant suspension are eligible (notably, minimum costs necessary for a possible resumption of the action and costs relating to contracts which were entered into before the pre-information letter was received and which could not reasonably be suspended, reallocated or terminated on legal grounds)
- grant agreement termination (Article 32): the final grant amount and final payment will be calculated taking into account also costs relating to contracts due for execution only after termination takes effect, if the contract was entered into before the pre-information letter was received and could not reasonably be terminated on legal grounds
- liability for damages (Article 33.2): the granting authority must be compensated for damage it sustains as a result of the implementation of the action or because the action was not implemented in full compliance with the Agreement only if the damage is due to an infringement of the participant's internal rules and procedures or due to a violation of third parties' rights by the participant or one of its employees or individual for whom the employees are responsible.

Participants whose pillar assessment covers procurement and granting procedures may also do purchases, subcontracting and financial support to third parties (Article 6.2) in accordance with their internal rules and procedures for purchases, subcontracting and financial support.

Participants whose pillar assessment covers data protection rules may rely on their internal standards, rules and procedures for data protection (Article 15).

The participants may however not rely on provisions which would breach the principle of equal treatment of applicants or beneficiaries or call into question the decision awarding the grant, such as in particular:

- eligibility (Article 6)
- consortium roles and set-up (Articles 7-9)
- security and ethics (Articles 13, 14)
- IPR (including background and results, access rights and rights of use), communication, dissemination and visibility (Articles 16 and 17)
- information obligation (Article 19)
- payment, reporting and amendments (Articles 21, 22 and 39)
- rejections, reductions, suspensions and terminations (Articles 27, 28, 29-32)

If the pillar assessment was subject to remedial measures, reliance on the internal systems, rules and procedures is subject to compliance with those remedial measures.

Participants whose assessment has not yet been updated to cover (the new rules on) data protection may rely on their internal systems, rules and procedures, provided that they ensure that personal data is:

- processed lawfully, fairly and in a transparent manner in relation to the data subject
- collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
- adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed
- accurate and, where necessary, kept up to date
- kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the data is processed and
- processed in a manner that ensures appropriate security of the personal data.

Participants must inform the coordinator without delay of any changes to the systems, rules and procedures that were part of the pillar assessment. The coordinator must immediately inform the granting authority.

Pillar-assessed participants that have also concluded a framework agreement with the EU, may moreover — under the same conditions as those above (i.e. not call into question the decision awarding the grant or breach the principle of equal treatment of applicants or beneficiaries) — rely on the provisions set out in that framework agreement.

SECTION 2 RULES FOR CARRYING OUT THE ACTION

ARTICLE 11 — PROPER IMPLEMENTATION OF THE ACTION

11.1 Obligation to properly implement the action

The beneficiaries must implement the action as described in Annex 1 and in compliance with the provisions of the Agreement, the call conditions and all legal obligations under applicable EU, international and national law.

11.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 12 — CONFLICT OF INTERESTS

12.1 Conflict of interests

The beneficiaries must take all measures to prevent any situation where the impartial and objective implementation of the Agreement could be compromised for reasons involving family, emotional life,

political or national affinity, economic interest or any other direct or indirect interest (‘conflict of interests’).

They must formally notify the granting authority without delay of any situation constituting or likely to lead to a conflict of interests and immediately take all the necessary steps to rectify this situation.

The granting authority may verify that the measures taken are appropriate and may require additional measures to be taken by a specified deadline.

12.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28) and the grant or the beneficiary may be terminated (see Article 32).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 13 — CONFIDENTIALITY AND SECURITY

13.1 Sensitive information

The parties must keep confidential any data, documents or other material (in any form) that is identified as sensitive in writing (‘sensitive information’) — during the implementation of the action and for at least until the time-limit set out in the Data Sheet (see Point 6).

If a beneficiary requests, the granting authority may agree to keep such information confidential for a longer period.

Unless otherwise agreed between the parties, they may use sensitive information only to implement the Agreement.

The beneficiaries may disclose sensitive information to their personnel or other participants involved in the action only if they:

- (a) need to know it in order to implement the Agreement and
- (b) are bound by an obligation of confidentiality.

The granting authority may disclose sensitive information to its staff and to other EU institutions and bodies.

It may moreover disclose sensitive information to third parties, if:

- (a) this is necessary to implement the Agreement or safeguard the EU financial interests and
- (b) the recipients of the information are bound by an obligation of confidentiality.

The confidentiality obligations no longer apply if:

- (a) the disclosing party agrees to release the other party
- (b) the information becomes publicly available, without breaching any confidentiality obligation
- (c) the disclosure of the sensitive information is required by EU, international or national law.

Specific confidentiality rules (if any) are set out in Annex 5.

13.2 Classified information

The parties must handle classified information in accordance with the applicable EU, international or national law on classified information (in particular, Decision 2015/444¹⁴ and its implementing rules).

Deliverables which contain classified information must be submitted according to special procedures agreed with the granting authority.

Action tasks involving classified information may be subcontracted only after explicit approval (in writing) from the granting authority.

Classified information may not be disclosed to any third party (including participants involved in the action implementation) without prior explicit written approval from the granting authority.

Specific security rules (if any) are set out in Annex 5.

13.3 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 14 — ETHICS AND VALUES

14.1 Ethics

The action must be carried out in line with the highest ethical standards and the applicable EU, international and national law on ethical principles.

Specific ethics rules (if any) are set out in Annex 5.

14.2 Values

The beneficiaries must commit to and ensure the respect of basic EU values (such as respect for human dignity, freedom, democracy, equality, the rule of law and human rights, including the rights of minorities).

Specific rules on values (if any) are set out in Annex 5.

14.3 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

¹⁴ Commission Decision 2015/444/EC, Euratom of 13 March 2015 on the security rules for protecting EU classified information (OJ L 72, 17.3.2015, p. 53).

ARTICLE 15 — DATA PROTECTION

15.1 Data processing by the granting authority

Any personal data under the Agreement will be processed under the responsibility of the data controller of the granting authority in accordance with and for the purposes set out in the Portal Privacy Statement.

For grants where the granting authority is the European Commission, an EU regulatory or executive agency, joint undertaking or other EU body, the processing will be subject to Regulation 2018/1725¹⁵.

15.2 Data processing by the beneficiaries

The beneficiaries must process personal data under the Agreement in compliance with the applicable EU, international and national law on data protection (in particular, Regulation 2016/679¹⁶).

They must ensure that personal data is:

- processed lawfully, fairly and in a transparent manner in relation to the data subjects
- collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
- adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed
- accurate and, where necessary, kept up to date
- kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the data is processed and
- processed in a manner that ensures appropriate security of the data.

The beneficiaries may grant their personnel access to personal data only if it is strictly necessary for implementing, managing and monitoring the Agreement. The beneficiaries must ensure that the personnel is under a confidentiality obligation.

The beneficiaries must inform the persons whose data are transferred to the granting authority and provide them with the Portal Privacy Statement.

15.3 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

¹⁵ Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC (OJ L 295, 21.11.2018, p. 39).

¹⁶ Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC ('GDPR') (OJ L 119, 4.5.2016, p. 1).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 16 — INTELLECTUAL PROPERTY RIGHTS (IPR) — BACKGROUND AND RESULTS — ACCESS RIGHTS AND RIGHTS OF USE

16.1 Background and access rights to background

The beneficiaries must give each other and the other participants access to the background identified as needed for implementing the action, subject to any specific rules in Annex 5.

‘Background’ means any data, know-how or information — whatever its form or nature (tangible or intangible), including any rights such as intellectual property rights — that is:

- (a) held by the beneficiaries before they acceded to the Agreement and
- (b) needed to implement the action or exploit the results.

If background is subject to rights of a third party, the beneficiary concerned must ensure that it is able to comply with its obligations under the Agreement.

16.2 Ownership of results

The granting authority does not obtain ownership of the results produced under the action.

‘Results’ means any tangible or intangible effect of the action, such as data, know-how or information, whatever its form or nature, whether or not it can be protected, as well as any rights attached to it, including intellectual property rights.

16.3 Rights of use of the granting authority on materials, documents and information received for policy, information, communication, dissemination and publicity purposes

The granting authority has the right to use non-sensitive information relating to the action and materials and documents received from the beneficiaries (notably summaries for publication, deliverables, as well as any other material, such as pictures or audio-visual material, in paper or electronic form) for policy, information, communication, dissemination and publicity purposes — during the action or afterwards.

The right to use the beneficiaries’ materials, documents and information is granted in the form of a royalty-free, non-exclusive and irrevocable licence, which includes the following rights:

- (a) **use for its own purposes** (in particular, making them available to persons working for the granting authority or any other EU service (including institutions, bodies, offices, agencies, etc.) or EU Member State institution or body; copying or reproducing them in whole or in part, in unlimited numbers; and communication through press information services)
- (b) **distribution to the public** (in particular, publication as hard copies and in electronic or digital format, publication on the internet, as a downloadable or non-downloadable file, broadcasting by any channel, public display or presentation, communicating through press information services, or inclusion in widely accessible databases or indexes)
- (c) **editing or redrafting** (including shortening, summarising, inserting other elements (e.g.

meta-data, legends, other graphic, visual, audio or text elements), extracting parts (e.g. audio or video files), dividing into parts, use in a compilation)

(d) **translation**

(e) **storage** in paper, electronic or other form

(f) **archiving**, in line with applicable document-management rules

(g) the right to authorise **third parties** to act on its behalf or sub-license to third parties the modes of use set out in Points (b), (c), (d) and (f), if needed for the information, communication and publicity activity of the granting authority

(h) **processing**, analysing, aggregating the materials, documents and information received and **producing derivative works**.

The rights of use are granted for the whole duration of the industrial or intellectual property rights concerned.

If materials or documents are subject to moral rights or third party rights (including intellectual property rights or rights of natural persons on their image and voice), the beneficiaries must ensure that they comply with their obligations under this Agreement (in particular, by obtaining the necessary licences and authorisations from the rights holders concerned).

Where applicable, the granting authority will insert the following information:

“© – [year] – [name of the copyright owner]. All rights reserved. Licensed to the [name of granting authority] under conditions.”

16.4 Specific rules on IPR, results and background

Specific rules regarding intellectual property rights, results and background (if any) are set out in Annex 5.

16.5 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such a breach may also lead to other measures described in Chapter 5.

ARTICLE 17 — COMMUNICATION, DISSEMINATION AND VISIBILITY

17.1 Communication — Dissemination — Promoting the action

Unless otherwise agreed with the granting authority, the beneficiaries must promote the action and its results by providing targeted information to multiple audiences (including the media and the public), in accordance with Annex 1 and in a strategic, coherent and effective manner.

Before engaging in a communication or dissemination activity expected to have a major media impact, the beneficiaries must inform the granting authority.

17.2 Visibility — European flag and funding statement

Unless otherwise agreed with the granting authority, communication activities of the beneficiaries related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate):



Funded by the
European Union



Co-funded by the
European Union



Funded by the
European Union



Co-funded by the
European Union

The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text.

Apart from the emblem, no other visual identity or logo may be used to highlight the EU support.

When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos.

For the purposes of their obligations under this Article, the beneficiaries may use the emblem without first obtaining approval from the granting authority. This does not, however, give them the right to exclusive use. Moreover, they may not appropriate the emblem or any similar trademark or logo, either by registration or by any other means.

17.3 Quality of information — Disclaimer

Any communication or dissemination activity related to the action must use factually accurate information.

Moreover, it must indicate the following disclaimer (translated into local languages where appropriate):

“Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them.”

17.4 Specific communication, dissemination and visibility rules

Specific communication, dissemination and visibility rules (if any) are set out in Annex 5.

17.5 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 18 — SPECIFIC RULES FOR CARRYING OUT THE ACTION

18.1 Specific rules for carrying out the action

Specific rules for implementing the action (if any) are set out in Annex 5.

18.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such a breach may also lead to other measures described in Chapter 5.

SECTION 3 GRANT ADMINISTRATION

ARTICLE 19 — GENERAL INFORMATION OBLIGATIONS

19.1 Information requests

The beneficiaries must provide — during the action or afterwards and in accordance with Article 7 — any information requested in order to verify eligibility of the costs or contributions declared, proper implementation of the action and compliance with the other obligations under the Agreement.

The information provided must be accurate, precise and complete and in the format requested, including electronic format.

19.2 Participant Register data updates

The beneficiaries must keep — at all times, during the action or afterwards — their information stored in the Portal Participant Register up to date, in particular, their name, address, legal representatives, legal form and organisation type.

19.3 Information about events and circumstances which impact the action

The beneficiaries must immediately inform the granting authority (and the other beneficiaries) of any of the following:

- (a) **events** which are likely to affect or delay the implementation of the action or affect the EU's financial interests, in particular:
 - (i) changes in their legal, financial, technical, organisational or ownership situation (including changes linked to one of the exclusion grounds listed in the declaration of honour signed before grant signature)
 - (ii) linked action information: not applicable
- (b) **circumstances** affecting:
 - (i) the decision to award the grant or
 - (ii) compliance with requirements under the Agreement.

19.4 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 20 — RECORD-KEEPING

20.1 Keeping records and supporting documents

The beneficiaries must — at least until the time-limit set out in the Data Sheet (see Point 6) — keep records and other supporting documents to prove the proper implementation of the action in line with the accepted standards in the respective field (if any).

In addition, the beneficiaries must — for the same period — keep the following to justify the amounts declared:

- (a) for actual costs: adequate records and supporting documents to prove the costs declared (such as contracts, subcontracts, invoices and accounting records); in addition, the beneficiaries' usual accounting and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts and the amounts stated in the supporting documents
- (b) for flat-rate costs and contributions (if any): adequate records and supporting documents to prove the eligibility of the costs or contributions to which the flat-rate is applied
- (c) for the following simplified costs and contributions: the beneficiaries do not need to keep specific records on the actual costs incurred, but must keep:
 - (i) for unit costs and contributions (if any): adequate records and supporting documents to prove the number of units declared
 - (ii) for lump sum costs and contributions (if any): adequate records and supporting documents to prove proper implementation of the work as described in Annex 1
 - (iii) for financing not linked to costs (if any): adequate records and supporting documents

to prove the achievement of the results or the fulfilment of the conditions as described in Annex 1

- (d) for unit, flat-rate and lump sum costs and contributions according to usual cost accounting practices (if any): the beneficiaries must keep any adequate records and supporting documents to prove that their cost accounting practices have been applied in a consistent manner, based on objective criteria, regardless of the source of funding, and that they comply with the eligibility conditions set out in Articles 6.1 and 6.2.

Moreover, the following is needed for specific budget categories:

- (e) for personnel costs: time worked for the beneficiary under the action must be supported by declarations signed monthly by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept alternative evidence supporting the time worked for the action declared, if it considers that it offers an adequate level of assurance
- (f) additional record-keeping rules: not applicable

The records and supporting documents must be made available upon request (see Article 19) or in the context of checks, reviews, audits or investigations (see Article 25).

If there are on-going checks, reviews, audits, investigations, litigation or other pursuits of claims under the Agreement (including the extension of findings; see Article 25), the beneficiaries must keep these records and other supporting documentation until the end of these procedures.

The beneficiaries must keep the original documents. Digital and digitalised documents are considered originals if they are authorised by the applicable national law. The granting authority may accept non-original documents if they offer a comparable level of assurance.

20.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, costs or contributions insufficiently substantiated will be ineligible (see Article 6) and will be rejected (see Article 27), and the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 21 — REPORTING

21.1 Continuous reporting

The beneficiaries must continuously report on the progress of the action (e.g. **deliverables, milestones, outputs/outcomes, critical risks, indicators**, etc; if any), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

Standardised deliverables (e.g. progress reports not linked to payments, reports on cumulative expenditure, special reports, etc; if any) must be submitted using the templates published on the Portal.

21.2 Periodic reporting: Technical reports and financial statements

In addition, the beneficiaries must provide reports to request payments, in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2):

- for additional prefinancings (if any): an **additional prefinancing report**
- for interim payments (if any) and the final payment: a **periodic report**.

The prefinancing and periodic reports include a technical and financial part.

The technical part includes an overview of the action implementation. It must be prepared using the template available in the Portal Periodic Reporting tool.

The financial part of the additional prefinancing report includes a statement on the use of the previous prefinancing payment.

The financial part of the periodic report includes:

- the financial statements (individual and consolidated; for all beneficiaries/affiliated entities)
- the explanation on the use of resources (or detailed cost reporting table, if required)
- the certificates on the financial statements (CFS) (if required; see Article 24.2 and Data Sheet, Point 4.3).

The **financial statements** must detail the eligible costs and contributions for each budget category and, for the final payment, also the revenues for the action (see Articles 6 and 22).

All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority.

By signing the financial statements (directly in the Portal Periodic Reporting tool), the beneficiaries confirm that:

- the information provided is complete, reliable and true
- the costs and contributions declared are eligible (see Article 6)
- the costs and contributions can be substantiated by adequate records and supporting documents (see Article 20) that will be produced upon request (see Article 19) or in the context of checks, reviews, audits and investigations (see Article 25)
- for the final periodic report: all the revenues have been declared (if required; see Article 22).

Beneficiaries will have to submit also the financial statements of their affiliated entities (if any). In case of recoveries (see Article 22), beneficiaries will be held responsible also for the financial statements of their affiliated entities.

21.3 Currency for financial statements and conversion into euros

The financial statements must be drafted in euro.

Beneficiaries with general accounts established in a currency other than the euro must convert the

costs recorded in their accounts into euro, at the average of the daily exchange rates published in the C series of the *Official Journal of the European Union* (ECB website), calculated over the corresponding reporting period.

If no daily euro exchange rate is published in the *Official Journal* for the currency in question, they must be converted at the average of the monthly accounting exchange rates published on the European Commission website (InforEuro), calculated over the corresponding reporting period.

Beneficiaries with general accounts in euro must convert costs incurred in another currency into euro according to their usual accounting practices.

21.4 Reporting language

The reporting must be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

21.5 Consequences of non-compliance

If a report submitted does not comply with this Article, the granting authority may suspend the payment deadline (see Article 29) and apply other measures described in Chapter 5.

If the coordinator breaches its reporting obligations, the granting authority may terminate the grant or the coordinator's participation (see Article 32) or apply other measures described in Chapter 5.

ARTICLE 22 — PAYMENTS AND RECOVERIES — CALCULATION OF AMOUNTS DUE

22.1 Payments and payment arrangements

Payments will be made in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2).

They will be made in euro to the bank account indicated by the coordinator (see Data Sheet, Point 4.2) and must be distributed without unjustified delay (restrictions may apply to distribution of the initial prefinancing payment; see Data Sheet, Point 4.2).

Payments to this bank account will discharge the granting authority from its payment obligation.

The cost of payment transfers will be borne as follows:

- the granting authority bears the cost of transfers charged by its bank
- the beneficiary bears the cost of transfers charged by its bank
- the party causing a repetition of a transfer bears all costs of the repeated transfer.

Payments by the granting authority will be considered to have been carried out on the date when they are debited to its account.

22.2 Recoveries

Recoveries will be made, if — at beneficiary termination, final payment or afterwards — it turns out that the granting authority has paid too much and needs to recover the amounts undue.

The general liability regime for recoveries (first-line liability) is as follows: At final payment, the coordinator will be fully liable for recoveries, even if it has not been the final recipient of the undue amounts. At beneficiary termination or after final payment, recoveries will be made directly against the beneficiaries concerned.

Beneficiaries will be fully liable for repaying the debts of their affiliated entities.

In case of enforced recoveries (see Article 22.4):

- the beneficiaries will be jointly and severally liable for repaying debts of another beneficiary under the Agreement (including late-payment interest), if required by the granting authority (see Data Sheet, Point 4.4)
- affiliated entities will be held liable for repaying debts of their beneficiaries under the Agreement (including late-payment interest), if required by the granting authority (see Data Sheet, Point 4.4).

22.3 Amounts due

22.3.1 Prefinancing payments

The aim of the prefinancing is to provide the beneficiaries with a float.

It remains the property of the EU until the final payment.

For **initial prefinancings** (if any), the amount due, schedule and modalities are set out in the Data Sheet (see Point 4.2).

For **additional prefinancings** (if any), the amount due, schedule and modalities are also set out in the Data Sheet (see Point 4.2). However, if the statement on the use of the previous prefinancing payment shows that less than 70% was used, the amount set out in the Data Sheet will be reduced by the difference between the 70% threshold and the amount used.

Prefinancing payments (or parts of them) may be offset (without the beneficiaries' consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

22.3.2 Amount due at beneficiary termination — Recovery

In case of beneficiary termination, the granting authority will determine the provisional amount due for the beneficiary concerned. Payments (if any) will be made with the next interim or final payment.

The **amount due** will be calculated in the following step:

Step 1 — Calculation of the total accepted EU contribution

Step 1 — Calculation of the total accepted EU contribution

The granting authority will first calculate the ‘accepted EU contribution’ for the beneficiary for all reporting periods, by calculating the ‘maximum EU contribution to costs’ (applying the funding rate to the accepted costs of the beneficiary), taking into account requests for a lower contribution to costs and CFS threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions (if any). The resulting amount is the ‘total accepted EU contribution’ for the beneficiary.

The **balance** is then calculated by deducting the payments received (if any; see report on the distribution of payments in Article 32), from the total accepted EU contribution:

$$\begin{aligned} & \{ \text{total accepted EU contribution for the beneficiary} \\ & \text{minus} \\ & \{ \text{prefinancing and interim payments received (if any)} \} \}. \end{aligned}$$

If the balance is **positive**, the amount will be included in the next interim or final payment to the consortium.

If the balance is **negative**, it will be **recovered** in accordance with the following procedure:

The granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to recover, the amount due, the amount to be recovered and the reasons why and
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered and ask this amount to be paid to the coordinator (**confirmation letter**).

The amounts will later on also be taken into account for the next interim or final payment.

22.3.3 Interim payments

Interim payments reimburse the eligible costs and contributions claimed for the implementation of the action during the reporting periods (if any).

Interim payments (if any) will be made in accordance with the schedule and modalities set out the Data Sheet (see Point 4.2).

Payment is subject to the approval of the periodic report. Its approval does not imply recognition of compliance, authenticity, completeness or correctness of its content.

The **interim payment** will be calculated by the granting authority in the following steps:

Step 1 — Calculation of the total accepted EU contribution

Step 2 — Limit to the interim payment ceiling

Step 1 — Calculation of the total accepted EU contribution

The granting authority will calculate the ‘accepted EU contribution’ for the action for the reporting period, by first calculating the ‘maximum EU contribution to costs’ (applying the funding rate to the accepted costs of each beneficiary), taking into account requests for a lower contribution to costs, and CFS threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions from beneficiary termination (if any). The resulting amount is the ‘total accepted EU contribution’.

Step 2 — Limit to the interim payment ceiling

The resulting amount is then capped to ensure that the total amount of prefinancing and interim payments (if any) does not exceed the interim payment ceiling set out in the Data Sheet (see Point 4.2).

Interim payments (or parts of them) may be offset (without the beneficiaries’ consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

22.3.4 Final payment — Final grant amount — Revenues and Profit — Recovery

The final payment (payment of the balance) reimburses the remaining part of the eligible costs and contributions claimed for the implementation of the action (if any).

The final payment will be made in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2).

Payment is subject to the approval of the final periodic report. Its approval does not imply recognition of compliance, authenticity, completeness or correctness of its content.

The **final grant amount for the action** will be calculated in the following steps:

Step 1 — Calculation of the total accepted EU contribution

Step 2 — Limit to the maximum grant amount

Step 3 — Reduction due to the no-profit rule

Step 1 — Calculation of the total accepted EU contribution

The granting authority will first calculate the ‘accepted EU contribution’ for the action for all reporting periods, by calculating the ‘maximum EU contribution to costs’ (applying the funding rate to the total accepted costs of each beneficiary), taking into account requests for a lower contribution to costs, CFS

threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions (if any). The resulting amount is the ‘total accepted EU contribution’.

Step 2 — Limit to the maximum grant amount

If the resulting amount is higher than the maximum grant amount set out in Article 5.2, it will be limited to the latter.

Step 3 — Reduction due to the no-profit rule

If the no-profit rule is provided for in the Data Sheet (see Point 4.2), the grant must not produce a profit (i.e. surplus of the amount obtained following Step 2 plus the action’s revenues, over the eligible costs and contributions approved by the granting authority).

‘Revenue’ is all income generated by the action, during its duration (see Article 4), for beneficiaries that are profit legal entities.

If there is a profit, it will be deducted in proportion to the final rate of reimbursement of the eligible costs approved by the granting authority (as compared to the amount calculated following Steps 1 and 2 minus the contributions).

The **balance** (final payment) is then calculated by deducting the total amount of prefinancing and interim payments already made (if any), from the final grant amount:

$$\begin{aligned} &\{\text{final grant amount} \\ &\text{minus} \\ &\{\text{prefinancing and interim payments made (if any)}\}\}. \end{aligned}$$

If the balance is **positive**, it will be **paid** to the coordinator.

The final payment (or part of it) may be offset (without the beneficiaries’ consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

If the balance is **negative**, it will be **recovered** in accordance with the following procedure:

The granting authority will send a **pre-information letter** to the coordinator:

- formally notifying the intention to recover, the final grant amount, the amount to be recovered and the reasons why
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered (**confirmation letter**), together with a **debit note** with the terms and date for payment.

If payment is not made by the date specified in the debit note, the granting authority will **enforce recovery** in accordance with Article 22.4.

22.3.5 Audit implementation after final payment — Revised final grant amount — Recovery

If — after the final payment (in particular, after checks, reviews, audits or investigations; see Article 25) — the granting authority rejects costs or contributions (see Article 27) or reduces the grant (see Article 28), it will calculate the **revised final grant amount** for the beneficiary concerned.

The **beneficiary revised final grant amount** will be calculated in the following step:

Step 1 — Calculation of the revised total accepted EU contribution

Step 1 — Calculation of the revised total accepted EU contribution

The granting authority will first calculate the ‘revised accepted EU contribution’ for the beneficiary, by calculating the ‘revised accepted costs’ and ‘revised accepted contributions’.

After that, it will take into account grant reductions (if any). The resulting ‘revised total accepted EU contribution’ is the beneficiary revised final grant amount.

If the revised final grant amount is lower than the beneficiary’s final grant amount (i.e. its share in the final grant amount for the action), it will be **recovered** in accordance with the following procedure:

The **beneficiary final grant amount** (i.e. share in the final grant amount for the action) is calculated as follows:

$$\left\{ \begin{array}{l} \text{total accepted EU contribution for the beneficiary} \\ \text{divided by} \\ \text{total accepted EU contribution for the action} \end{array} \right\} \times \left\{ \begin{array}{l} \text{multiplied by} \\ \text{final grant amount for the action} \end{array} \right\}.$$

The granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to recover, the amount to be recovered and the reasons why and
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered (**confirmation letter**), together with a **debit note** with the terms and the date for payment.

Recoveries against affiliated entities (if any) will be handled through their beneficiaries.

If payment is not made by the date specified in the debit note, the granting authority will **enforce recovery** in accordance with Article 22.4.

22.4 Enforced recovery

If payment is not made by the date specified in the debit note, the amount due will be recovered:

- (a) by offsetting the amount — without the coordinator or beneficiary's consent — against any amounts owed to the coordinator or beneficiary by the granting authority.

In exceptional circumstances, to safeguard the EU financial interests, the amount may be offset before the payment date specified in the debit note.

For grants where the granting authority is the European Commission or an EU executive agency, debts may also be offset against amounts owed by other Commission services or executive agencies.

- (b) by drawing on the financial guarantee(s) (if any)
- (c) by holding other beneficiaries jointly and severally liable (if any; see Data Sheet, Point 4.4)
- (d) by holding affiliated entities jointly and severally liable (if any, see Data Sheet, Point 4.4)
- (e) by taking legal action (see Article 43) or, provided that the granting authority is the European Commission or an EU executive agency, by adopting an enforceable decision under Article 299 of the Treaty on the Functioning of the EU (TFEU) and Article 100(2) of EU Financial Regulation 2018/1046.

The amount to be recovered will be increased by **late-payment interest** at the rate set out in Article 22.5, from the day following the payment date in the debit note, up to and including the date the full payment is received.

Partial payments will be first credited against expenses, charges and late-payment interest and then against the principal.

Bank charges incurred in the recovery process will be borne by the beneficiary, unless Directive 2015/2366¹⁷ applies.

For grants where the granting authority is an EU executive agency, enforced recovery by offsetting or enforceable decision will be done by the services of the European Commission (see also Article 43).

22.5 Consequences of non-compliance

22.5.1 If the granting authority does not pay within the payment deadlines (see above), the beneficiaries are entitled to **late-payment interest** at the rate applied by the European Central Bank (ECB) for its main refinancing operations in euros ('reference rate'), plus the rate specified in the Data Sheet (Point 4.2). The reference rate is the rate in force on the first day of the month in which the payment deadline expires, as published in the C series of the *Official Journal of the European Union*.

If the late-payment interest is lower than or equal to EUR 200, it will be paid to the coordinator only on request submitted within two months of receiving the late payment.

¹⁷ Directive (EU) 2015/2366 of the European Parliament and of the Council of 25 November 2015 on payment services in the internal market, amending Directives 2002/65/EC, 2009/110/EC and 2013/36/EU and Regulation (EU) No 1093/2010, and repealing Directive 2007/64/EC (OJ L 337, 23.12.2015, p. 35).

Late-payment interest is not due if all beneficiaries are EU Member States (including regional and local government authorities or other public bodies acting on behalf of a Member State for the purpose of this Agreement).

If payments or the payment deadline are suspended (see Articles 29 and 30), payment will not be considered as late.

Late-payment interest covers the period running from the day following the due date for payment (see above), up to and including the date of payment.

Late-payment interest is not considered for the purposes of calculating the final grant amount.

22.5.2 If the coordinator breaches any of its obligations under this Article, the grant may be reduced (see Article 28) and the grant or the coordinator may be terminated (see Article 32).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 23 — GUARANTEES

23.1 Prefinancing guarantee

If required by the granting authority (see Data Sheet, Point 4.2), the beneficiaries must provide (one or more) prefinancing guarantee(s) in accordance with the timing and the amounts set out in the Data Sheet.

The coordinator must submit them to the granting authority in due time before the prefinancing they are linked to.

The guarantees must be drawn up using the template published on the Portal and fulfil the following conditions:

- (a) be provided by a bank or approved financial institution established in the EU or — if requested by the coordinator and accepted by the granting authority — by a third party or a bank or financial institution established outside the EU offering equivalent security
- (b) the guarantor stands as first-call guarantor and does not require the granting authority to first have recourse against the principal debtor (i.e. the beneficiary concerned) and
- (c) remain explicitly in force until the final payment and, if the final payment takes the form of a recovery, until five months after the debit note is notified to a beneficiary.

They will be released within the following month.

23.2 Consequences of non-compliance

If the beneficiaries breach their obligation to provide the prefinancing guarantee, the prefinancing will not be paid.

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 24 — CERTIFICATES

24.1 Operational verification report (OVR)

Not applicable

24.2 Certificate on the financial statements (CFS)

If required by the granting authority (see Data Sheet, Point 4.3), the beneficiaries must provide certificates on their financial statements (CFS), in accordance with the schedule, threshold and conditions set out in the Data Sheet.

The coordinator must submit them as part of the periodic report (see Article 21).

The certificates must be drawn up using the template published on the Portal, cover the costs declared on the basis of actual costs and costs according to usual cost accounting practices (if any), and fulfil the following conditions:

- (a) be provided by a qualified approved external auditor which is independent and complies with Directive 2006/43/EC¹⁸ (or for public bodies: by a competent independent public officer)
- (b) the verification must be carried out according to the highest professional standards to ensure that the financial statements comply with the provisions under the Agreement and that the costs declared are eligible.

The certificates will not affect the granting authority's right to carry out its own checks, reviews or audits, nor preclude the European Court of Auditors (ECA), the European Public Prosecutor's Office (EPPO) or the European Anti-Fraud Office (OLAF) from using their prerogatives for audits and investigations under the Agreement (see Article 25).

If the costs (or a part of them) were already audited by the granting authority, these costs do not need to be covered by the certificate and will not be counted for calculating the threshold (if any).

24.3 Certificate on the compliance of usual cost accounting practices (CoMUC)

Not applicable

24.4 Systems and process audit (SPA)

Not applicable

24.5 Consequences of non-compliance

If a beneficiary does not submit a certificate on the financial statements (CFS) or the certificate is rejected, the accepted EU contribution to costs will be capped to reflect the CFS threshold.

If a beneficiary breaches any of its other obligations under this Article, the granting authority may apply the measures described in Chapter 5.

ARTICLE 25 — CHECKS, REVIEWS, AUDITS AND INVESTIGATIONS — EXTENSION OF FINDINGS

¹⁸ Directive 2006/43/EC of the European Parliament and of the Council of 17 May 2006 on statutory audits of annual accounts and consolidated accounts or similar national regulations (OJ L 157, 9.6.2006, p. 87).

25.1 Granting authority checks, reviews and audits

25.1.1 Internal checks

The granting authority may — during the action or afterwards — check the proper implementation of the action and compliance with the obligations under the Agreement, including assessing costs and contributions, deliverables and reports.

25.1.2 Project reviews

The granting authority may carry out reviews on the proper implementation of the action and compliance with the obligations under the Agreement (general project reviews or specific issues reviews).

Such project reviews may be started during the implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the coordinator or beneficiary concerned and will be considered to start on the date of the notification.

If needed, the granting authority may be assisted by independent, outside experts. If it uses outside experts, the coordinator or beneficiary concerned will be informed and have the right to object on grounds of commercial confidentiality or conflict of interest.

The coordinator or beneficiary concerned must cooperate diligently and provide — within the deadline requested — any information and data in addition to deliverables and reports already submitted (including information on the use of resources). The granting authority may request beneficiaries to provide such information to it directly. Sensitive information and documents will be treated in accordance with Article 13.

The coordinator or beneficiary concerned may be requested to participate in meetings, including with the outside experts.

For **on-the-spot visits**, the beneficiary concerned must allow access to sites and premises (including to the outside experts) and must ensure that information requested is readily available.

Information provided must be accurate, precise and complete and in the format requested, including electronic format.

On the basis of the review findings, a **project review report** will be drawn up.

The granting authority will formally notify the project review report to the coordinator or beneficiary concerned, which has 30 days from receiving notification to make observations.

Project reviews (including project review reports) will be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

25.1.3 Audits

The granting authority may carry out audits on the proper implementation of the action and compliance with the obligations under the Agreement.

Such audits may be started during the implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the beneficiary concerned and will be considered to start on the date of the notification.

The granting authority may use its own audit service, delegate audits to a centralised service or use external audit firms. If it uses an external firm, the beneficiary concerned will be informed and have the right to object on grounds of commercial confidentiality or conflict of interest.

The beneficiary concerned must cooperate diligently and provide — within the deadline requested — any information (including complete accounts, individual salary statements or other personal data) to verify compliance with the Agreement. Sensitive information and documents will be treated in accordance with Article 13.

For **on-the-spot** visits, the beneficiary concerned must allow access to sites and premises (including for the external audit firm) and must ensure that information requested is readily available.

Information provided must be accurate, precise and complete and in the format requested, including electronic format.

On the basis of the audit findings, a **draft audit report** will be drawn up.

The auditors will formally notify the draft audit report to the beneficiary concerned, which has 30 days from receiving notification to make observations (contradictory audit procedure).

The **final audit report** will take into account observations by the beneficiary concerned and will be formally notified to them.

Audits (including audit reports) will be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

25.2 European Commission checks, reviews and audits in grants of other granting authorities

Where the granting authority is not the European Commission, the latter has the same rights of checks, reviews and audits as the granting authority.

25.3 Access to records for assessing simplified forms of funding

The beneficiaries must give the European Commission access to their statutory records for the periodic assessment of simplified forms of funding which are used in EU programmes.

25.4 OLAF, EPPO and ECA audits and investigations

The following bodies may also carry out checks, reviews, audits and investigations — during the action or afterwards:

- the European Anti-Fraud Office (OLAF) under Regulations No 883/2013¹⁹ and No 2185/96²⁰
- the European Public Prosecutor's Office (EPPO) under Regulation 2017/1939

¹⁹ Regulation (EU, Euratom) No 883/2013 of the European Parliament and of the Council of 11 September 2013 concerning investigations conducted by the European Anti-Fraud Office (OLAF) and repealing Regulation (EC) No 1073/1999 of the European Parliament and of the Council and Council Regulation (Euratom) No 1074/1999 (OJ L 248, 18/09/2013, p. 1).

²⁰ Council Regulation (Euratom, EC) No 2185/96 of 11 November 1996 concerning on-the-spot checks and inspections carried out by the Commission in order to protect the European Communities' financial interests against fraud and other irregularities (OJ L 292, 15/11/1996, p. 2).

- the European Court of Auditors (ECA) under Article 287 of the Treaty on the Functioning of the EU (TFEU) and Article 257 of EU Financial Regulation 2018/1046.

If requested by these bodies, the beneficiary concerned must provide full, accurate and complete information in the format requested (including complete accounts, individual salary statements or other personal data, including in electronic format) and allow access to sites and premises for on-the-spot visits or inspections — as provided for under these Regulations.

To this end, the beneficiary concerned must keep all relevant information relating to the action, at least until the time-limit set out in the Data Sheet (Point 6) and, in any case, until any ongoing checks, reviews, audits, investigations, litigation or other pursuits of claims have been concluded.

25.5 Consequences of checks, reviews, audits and investigations — Extension of results of reviews, audits or investigations

25.5.1 Consequences of checks, reviews, audits and investigations in this grant

Findings in checks, reviews, audits or investigations carried out in the context of this grant may lead to rejections (see Article 27), grant reduction (see Article 28) or other measures described in Chapter 5.

Rejections or grant reductions after the final payment will lead to a revised final grant amount (see Article 22).

Findings in checks, reviews, audits or investigations during the action implementation may lead to a request for amendment (see Article 39), to change the description of the action set out in Annex 1.

Checks, reviews, audits or investigations that find systemic or recurrent errors, irregularities, fraud or breach of obligations in any EU grant may also lead to consequences in other EU grants awarded under similar conditions ('extension to other grants').

Moreover, findings arising from an OLAF or EPPO investigation may lead to criminal prosecution under national law.

25.5.2 Extension from other grants

Results of checks, reviews, audits or investigations in other grants may be extended to this grant, if:

- (a) the beneficiary concerned is found, in other EU grants awarded under similar conditions, to have committed systemic or recurrent errors, irregularities, fraud or breach of obligations that have a material impact on this grant and
- (b) those findings are formally notified to the beneficiary concerned — together with the list of grants affected by the findings — within the time-limit for audits set out in the Data Sheet (see Point 6).

The granting authority will formally notify the beneficiary concerned of the intention to extend the findings and the list of grants affected.

If the extension concerns **rejections of costs or contributions**: the notification will include:

- (a) an invitation to submit observations on the list of grants affected by the findings
- (b) the request to submit revised financial statements for all grants affected

- (c) the correction rate for extrapolation, established on the basis of the systemic or recurrent errors, to calculate the amounts to be rejected, if the beneficiary concerned:
 - (i) considers that the submission of revised financial statements is not possible or practicable or
 - (ii) does not submit revised financial statements.

If the extension concerns **grant reductions**: the notification will include:

- (a) an invitation to submit observations on the list of grants affected by the findings and
- (b) the **correction rate for extrapolation**, established on the basis of the systemic or recurrent errors and the principle of proportionality.

The beneficiary concerned has **60 days** from receiving notification to submit observations, revised financial statements or to propose a duly substantiated **alternative correction method/rate**.

On the basis of this, the granting authority will analyse the impact and decide on the implementation (i.e. start rejection or grant reduction procedures, either on the basis of the revised financial statements or the announced/alternative method/rate or a mix of those; see Articles 27 and 28).

25.6 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, costs or contributions insufficiently substantiated will be ineligible (see Article 6) and will be rejected (see Article 27), and the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

ARTICLE 26 — IMPACT EVALUATIONS

26.1 Impact evaluation

The granting authority may carry out impact evaluations of the action, measured against the objectives and indicators of the EU programme funding the grant.

Such evaluations may be started during implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the coordinator or beneficiaries and will be considered to start on the date of the notification.

If needed, the granting authority may be assisted by independent outside experts.

The coordinator or beneficiaries must provide any information relevant to evaluate the impact of the action, including information in electronic format.

26.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the granting authority may apply the measures described in Chapter 5.

CHAPTER 5 CONSEQUENCES OF NON-COMPLIANCE

SECTION 1 REJECTIONS AND GRANT REDUCTION

ARTICLE 27 — REJECTION OF COSTS AND CONTRIBUTIONS

27.1 Conditions

The granting authority will — at beneficiary termination, interim payment, final payment or afterwards — reject any costs or contributions which are ineligible (see Article 6), in particular following checks, reviews, audits or investigations (see Article 25).

The rejection may also be based on the extension of findings from other grants to this grant (see Article 25).

Ineligible costs or contributions will be rejected.

27.2 Procedure

If the rejection does not lead to a recovery, the granting authority will formally notify the coordinator or beneficiary concerned of the rejection, the amounts and the reasons why. The coordinator or beneficiary concerned may — within 30 days of receiving notification — submit observations if it disagrees with the rejection (payment review procedure).

If the rejection leads to a recovery, the granting authority will follow the contradictory procedure with pre-information letter set out in Article 22.

27.3 Effects

If the granting authority rejects costs or contributions, it will deduct them from the costs or contributions declared and then calculate the amount due (and, if needed, make a recovery; see Article 22).

ARTICLE 28 — GRANT REDUCTION

28.1 Conditions

The granting authority may — at beneficiary termination, final payment or afterwards — reduce the grant for a beneficiary, if:

- (a) the beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed:
 - (i) substantial errors, irregularities or fraud or
 - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) the beneficiary (or a person having powers of representation, decision-making or control, or

person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant (see Article 25).

The amount of the reduction will be calculated for each beneficiary concerned and proportionate to the seriousness and the duration of the errors, irregularities or fraud or breach of obligations, by applying an individual reduction rate to their accepted EU contribution.

28.2 Procedure

If the grant reduction does not lead to a recovery, the granting authority will formally notify the coordinator or beneficiary concerned of the reduction, the amount to be reduced and the reasons why. The coordinator or beneficiary concerned may — within 30 days of receiving notification — submit observations if it disagrees with the reduction (payment review procedure).

If the grant reduction leads to a recovery, the granting authority will follow the contradictory procedure with pre-information letter set out in Article 22.

28.3 Effects

If the granting authority reduces the grant, it will deduct the reduction and then calculate the amount due (and, if needed, make a recovery; see Article 22).

SECTION 2 SUSPENSION AND TERMINATION

ARTICLE 29 — PAYMENT DEADLINE SUSPENSION

29.1 Conditions

The granting authority may — at any moment — suspend the payment deadline if a payment cannot be processed because:

- (a) the required report (see Article 21) has not been submitted or is not complete or additional information is needed
- (b) there are doubts about the amount to be paid (e.g. ongoing audit extension procedure, queries about eligibility, need for a grant reduction, etc.) and additional checks, reviews, audits or investigations are necessary, or
- (c) there are other issues affecting the EU financial interests.

29.2 Procedure

The granting authority will formally notify the coordinator of the suspension and the reasons why.

The suspension will **take effect** the day the notification is sent.

If the conditions for suspending the payment deadline are no longer met, the suspension will be **lifted** — and the remaining time to pay (see Data Sheet, Point 4.2) will resume.

If the suspension exceeds two months, the coordinator may request the granting authority to confirm if the suspension will continue.

If the payment deadline has been suspended due to the non-compliance of the report and the revised report is not submitted (or was submitted but is also rejected), the granting authority may also terminate the grant or the participation of the coordinator (see Article 32).

ARTICLE 30 — PAYMENT SUSPENSION

30.1 Conditions

The granting authority may — at any moment — suspend payments, in whole or in part for one or more beneficiaries, if:

- (a) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed or is suspected of having committed:
 - (i) substantial errors, irregularities or fraud or
 - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant.

If payments are suspended for one or more beneficiaries, the granting authority will make partial payment(s) for the part(s) not suspended. If suspension concerns the final payment, the payment (or recovery) of the remaining amount after suspension is lifted will be considered to be the payment that closes the action.

30.2 Procedure

Before suspending payments, the granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to suspend payments and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the suspension (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

At the end of the suspension procedure, the granting authority will also inform the coordinator.

The suspension will **take effect** the day after the confirmation notification is sent.

If the conditions for resuming payments are met, the suspension will be **lifted**. The granting authority will formally notify the beneficiary concerned (and the coordinator) and set the suspension end date.

During the suspension, no prefinancing will be paid to the beneficiaries concerned. For interim payments, the periodic reports for all reporting periods except the last one (see Article 21) must not contain any financial statements from the beneficiary concerned (or its affiliated entities). The coordinator must include them in the next periodic report after the suspension is lifted or — if suspension is not lifted before the end of the action — in the last periodic report.

ARTICLE 31 — GRANT AGREEMENT SUSPENSION

31.1 Consortium-requested GA suspension

31.1.1 Conditions and procedure

The beneficiaries may request the suspension of the grant or any part of it, if exceptional circumstances — in particular *force majeure* (see Article 35) — make implementation impossible or excessively difficult.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the date the suspension takes effect; this date may be before the date of the submission of the amendment request and
- the expected date of resumption.

The suspension will **take effect** on the day specified in the amendment.

Once circumstances allow for implementation to resume, the coordinator must immediately request another **amendment** of the Agreement to set the suspension end date, the resumption date (one day after suspension end date), extend the duration and make other changes necessary to adapt the action to the new situation (see Article 39) — unless the grant has been terminated (see Article 32). The suspension will be **lifted** with effect from the suspension end date set out in the amendment. This date may be before the date of the submission of the amendment request.

During the suspension, no prefinancing will be paid. Costs incurred or contributions for activities implemented during grant suspension are not eligible (see Article 6.3).

31.2 EU-initiated GA suspension

31.2.1 Conditions

The granting authority may suspend the grant or any part of it, if:

- (a) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed or is suspected of having committed:
 - (i) substantial errors, irregularities or fraud or

- (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant
- (c) other:
 - (i) linked action issues: not applicable
 - (ii) additional GA suspension grounds: not applicable.

31.2.2 Procedure

Before suspending the grant, the granting authority will send a **pre-information letter** to the coordinator:

- formally notifying the intention to suspend the grant and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the suspension (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

The suspension will **take effect** the day after the confirmation notification is sent (or on a later date specified in the notification).

Once the conditions for resuming implementation of the action are met, the granting authority will formally notify the coordinator a **lifting of suspension letter**, in which it will set the suspension end date and invite the coordinator to request an amendment of the Agreement to set the resumption date (one day after suspension end date), extend the duration and make other changes necessary to adapt the action to the new situation (see Article 39) — unless the grant has been terminated (see Article 32). The suspension will be **lifted** with effect from the suspension end date set out in the lifting of suspension letter. This date may be before the date on which the letter is sent.

During the suspension, no prefinancing will be paid. Costs incurred or contributions for activities implemented during suspension are not eligible (see Article 6.3).

The beneficiaries may not claim damages due to suspension by the granting authority (see Article 33).

Grant suspension does not affect the granting authority's right to terminate the grant or a beneficiary (see Article 32) or reduce the grant (see Article 28).

ARTICLE 32 — GRANT AGREEMENT OR BENEFICIARY TERMINATION

32.1 Consortium-requested GA termination

32.1.1 Conditions and procedure

The beneficiaries may request the termination of the grant.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the date the consortium ends work on the action ('end of work date') and
- the date the termination takes effect ('termination date'); this date must be after the date of the submission of the amendment request.

The termination will **take effect** on the termination date specified in the amendment.

If no reasons are given or if the granting authority considers the reasons do not justify termination, it may consider the grant terminated improperly.

32.1.2 Effects

The coordinator must — within 60 days from when termination takes effect — submit a **periodic report** (for the open reporting period until termination).

The granting authority will calculate the final grant amount and final payment on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before the end of work date (see Article 22). Costs relating to contracts due for execution only after the end of work are not eligible.

If the granting authority does not receive the report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

Improper termination may lead to a grant reduction (see Article 28).

After termination, the beneficiaries' obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

32.2 Consortium-requested beneficiary termination

32.2.1 Conditions and procedure

The coordinator may request the termination of the participation of one or more beneficiaries, on request of the beneficiary concerned or on behalf of the other beneficiaries.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the opinion of the beneficiary concerned (or proof that this opinion has been requested in writing)

- the date the beneficiary ends work on the action ('end of work date')
- the date the termination takes effect ('termination date'); this date must be after the date of the submission of the amendment request.

If the termination concerns the coordinator and is done without its agreement, the amendment request must be submitted by another beneficiary (acting on behalf of the consortium).

The termination will **take effect** on the termination date specified in the amendment.

If no information is given or if the granting authority considers that the reasons do not justify termination, it may consider the beneficiary to have been terminated improperly.

32.2.2 Effects

The coordinator must — within 60 days from when termination takes effect — submit:

- (i) a **report on the distribution of payments** to the beneficiary concerned
- (ii) a **termination report** from the beneficiary concerned, for the open reporting period until termination, containing an overview of the progress of the work, the financial statement, the explanation on the use of resources, and, if applicable, the certificate on the financial statement (CFS; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
- (iii) a second **request for amendment** (see Article 39) with other amendments needed (e.g. reallocation of the tasks and the estimated budget of the terminated beneficiary; addition of a new beneficiary to replace the terminated beneficiary; change of coordinator, etc.).

The granting authority will calculate the amount due to the beneficiary on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before the end of work date (see Article 22). Costs relating to contracts due for execution only after the end of work are not eligible.

The information in the termination report must also be included in the periodic report for the next reporting period (see Article 21).

If the granting authority does not receive the termination report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/ contributions if no periodic report was ever approved).

If the granting authority does not receive the report on the distribution of payments within the deadline, it will consider that:

- the coordinator did not distribute any payment to the beneficiary concerned and that
- the beneficiary concerned must not repay any amount to the coordinator.

If the second request for amendment is accepted by the granting authority, the Agreement is **amended** to introduce the necessary changes (see Article 39).

If the second request for amendment is rejected by the granting authority (because it calls into question the decision awarding the grant or breaches the principle of equal treatment of applicants), the grant may be terminated (see Article 32).

Improper termination may lead to a reduction of the grant (see Article 31) or grant termination (see Article 32).

After termination, the concerned beneficiary's obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

32.3 EU-initiated GA or beneficiary termination

32.3.1 Conditions

The granting authority may terminate the grant or the participation of one or more beneficiaries, if:

- (a) one or more beneficiaries do not accede to the Agreement (see Article 40)
- (b) a change to the action or the legal, financial, technical, organisational or ownership situation of a beneficiary is likely to substantially affect the implementation of the action or calls into question the decision to award the grant (including changes linked to one of the exclusion grounds listed in the declaration of honour)
- (c) following termination of one or more beneficiaries, the necessary changes to the Agreement (and their impact on the action) would call into question the decision awarding the grant or breach the principle of equal treatment of applicants
- (d) implementation of the action has become impossible or the changes necessary for its continuation would call into question the decision awarding the grant or breach the principle of equal treatment of applicants
- (e) a beneficiary (or person with unlimited liability for its debts) is subject to bankruptcy proceedings or similar (including insolvency, winding-up, administration by a liquidator or court, arrangement with creditors, suspension of business activities, etc.)
- (f) a beneficiary (or person with unlimited liability for its debts) is in breach of social security or tax obligations
- (g) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has been found guilty of grave professional misconduct
- (h) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed fraud, corruption, or is involved in a criminal organisation, money laundering, terrorism-related crimes (including terrorism financing), child labour or human trafficking
- (i) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) was created under a different jurisdiction with the intent to circumvent fiscal, social or other legal obligations in the country of origin (or created another entity with this purpose)
- (j) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed:

- (i) substantial errors, irregularities or fraud or
- (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.)
- (k) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant (extension of findings from other grants to this grant; see Article 25)
- (l) despite a specific request by the granting authority, a beneficiary does not request — through the coordinator — an amendment to the Agreement to end the participation of one of its affiliated entities or associated partners that is in one of the situations under points (d), (f), (e), (g), (h), (i) or (j) and to reallocate its tasks, or
- (m) other:
 - (i) linked action issues: not applicable
 - (ii) additional GA termination grounds: not applicable.

32.3.2 Procedure

Before terminating the grant or participation of one or more beneficiaries, the granting authority will send a **pre-information letter** to the coordinator or beneficiary concerned:

- formally notifying the intention to terminate and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the termination and the date it will take effect (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

For beneficiary terminations, the granting authority will — at the end of the procedure — also inform the coordinator.

The termination will **take effect** the day after the confirmation notification is sent (or on a later date specified in the notification; ‘termination date’).

32.3.3 Effects

- (a) for **GA termination**:

The coordinator must — within 60 days from when termination takes effect — submit a **periodic report** (for the last open reporting period until termination).

The granting authority will calculate the final grant amount and final payment on the basis of the report submitted and taking into account the costs incurred and contributions for activities

implemented before termination takes effect (see Article 22). Costs relating to contracts due for execution only after termination are not eligible.

If the grant is terminated for breach of the obligation to submit reports, the coordinator may not submit any report after termination.

If the granting authority does not receive the report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

Termination does not affect the granting authority's right to reduce the grant (see Article 28) or to impose administrative sanctions (see Article 34).

The beneficiaries may not claim damages due to termination by the granting authority (see Article 33).

After termination, the beneficiaries' obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

(b) for beneficiary termination:

The coordinator must — within 60 days from when termination takes effect — submit:

- (i) a **report on the distribution of payments** to the beneficiary concerned
- (ii) a **termination report** from the beneficiary concerned, for the open reporting period until termination, containing an overview of the progress of the work, the financial statement, the explanation on the use of resources, and, if applicable, the certificate on the financial statement (CFS; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
- (iii) a **request for amendment** (see Article 39) with any amendments needed (e.g. reallocation of the tasks and the estimated budget of the terminated beneficiary; addition of a new beneficiary to replace the terminated beneficiary; change of coordinator, etc.).

The granting authority will calculate the amount due to the beneficiary on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before termination takes effect (see Article 22). Costs relating to contracts due for execution only after termination are not eligible.

The information in the termination report must also be included in the periodic report for the next reporting period (see Article 21).

If the granting authority does not receive the termination report within the deadline, only costs and contributions included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

If the granting authority does not receive the report on the distribution of payments within the deadline, it will consider that:

- the coordinator did not distribute any payment to the beneficiary concerned and that
- the beneficiary concerned must not repay any amount to the coordinator.

If the request for amendment is accepted by the granting authority, the Agreement is **amended** to introduce the necessary changes (see Article 39).

If the request for amendment is rejected by the granting authority (because it calls into question the decision awarding the grant or breaches the principle of equal treatment of applicants), the grant may be terminated (see Article 32).

After termination, the concerned beneficiary's obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

SECTION 3 OTHER CONSEQUENCES: DAMAGES AND ADMINISTRATIVE SANCTIONS

ARTICLE 33 — DAMAGES

33.1 Liability of the granting authority

The granting authority cannot be held liable for any damage caused to the beneficiaries or to third parties as a consequence of the implementation of the Agreement, including for gross negligence.

The granting authority cannot be held liable for any damage caused by any of the beneficiaries or other participants involved in the action, as a consequence of the implementation of the Agreement.

33.2 Liability of the beneficiaries

The beneficiaries must compensate the granting authority for any damage it sustains as a result of the implementation of the action or because the action was not implemented in full compliance with the Agreement, provided that it was caused by gross negligence or wilful act.

The liability does not extend to indirect or consequential losses or similar damage (such as loss of profit, loss of revenue or loss of contracts), provided such damage was not caused by wilful act or by a breach of confidentiality.

ARTICLE 34 — ADMINISTRATIVE SANCTIONS AND OTHER MEASURES

Nothing in this Agreement may be construed as preventing the adoption of administrative sanctions (i.e. exclusion from EU award procedures and/or financial penalties) or other public law measures, in addition or as an alternative to the contractual measures provided under this Agreement (see, for instance, Articles 135 to 145 EU Financial Regulation 2018/1046 and Articles 4 and 7 of Regulation 2988/95²¹).

²¹ Council Regulation (EC, Euratom) No 2988/95 of 18 December 1995 on the protection of the European Communities financial interests (OJ L 312, 23.12.1995, p. 1).

SECTION 4 FORCE MAJEURE

ARTICLE 35 — FORCE MAJEURE

A party prevented by force majeure from fulfilling its obligations under the Agreement cannot be considered in breach of them.

‘Force majeure’ means any situation or event that:

- prevents either party from fulfilling their obligations under the Agreement,
- was unforeseeable, exceptional situation and beyond the parties’ control,
- was not due to error or negligence on their part (or on the part of other participants involved in the action), and
- proves to be inevitable in spite of exercising all due diligence.

Any situation constituting force majeure must be formally notified to the other party without delay, stating the nature, likely duration and foreseeable effects.

The parties must immediately take all the necessary steps to limit any damage due to force majeure and do their best to resume implementation of the action as soon as possible.

CHAPTER 6 FINAL PROVISIONS

ARTICLE 36 — COMMUNICATION BETWEEN THE PARTIES

36.1 Forms and means of communication — Electronic management

EU grants are managed fully electronically through the EU Funding & Tenders Portal (‘Portal’).

All communications must be made electronically through the Portal, in accordance with the Portal Terms and Conditions and using the forms and templates provided there (except if explicitly instructed otherwise by the granting authority).

Communications must be made in writing and clearly identify the grant agreement (project number and acronym).

Communications must be made by persons authorised according to the Portal Terms and Conditions. For naming the authorised persons, each beneficiary must have designated — before the signature of this Agreement — a ‘legal entity appointed representative (LEAR)’. The role and tasks of the LEAR are stipulated in their appointment letter (see Portal Terms and Conditions).

If the electronic exchange system is temporarily unavailable, instructions will be given on the Portal.

36.2 Date of communication

The sending date for communications made through the Portal will be the date and time of sending, as indicated by the time logs.

The receiving date for communications made through the Portal will be the date and time the communication is accessed, as indicated by the time logs. Formal notifications that have not been accessed within 10 days after sending, will be considered to have been accessed (see Portal Terms and Conditions).

If a communication is exceptionally made on paper (by e-mail or postal service), general principles apply (i.e. date of sending/receipt). Formal notifications by registered post with proof of delivery will be considered to have been received either on the delivery date registered by the postal service or the deadline for collection at the post office.

If the electronic exchange system is temporarily unavailable, the sending party cannot be considered in breach of its obligation to send a communication within a specified deadline.

36.3 Addresses for communication

The Portal can be accessed via the Europa website.

The address for paper communications to the granting authority (if exceptionally allowed) is the official mailing address indicated on its website.

For beneficiaries, it is the legal address specified in the Portal Participant Register.

ARTICLE 37 — INTERPRETATION OF THE AGREEMENT

The provisions in the Data Sheet take precedence over the rest of the Terms and Conditions of the Agreement.

Annex 5 takes precedence over the Terms and Conditions; the Terms and Conditions take precedence over the Annexes other than Annex 5.

Annex 2 takes precedence over Annex 1.

ARTICLE 38 — CALCULATION OF PERIODS AND DEADLINES

In accordance with Regulation No 1182/71²², periods expressed in days, months or years are calculated from the moment the triggering event occurs.

The day during which that event occurs is not considered as falling within the period.

‘Days’ means calendar days, not working days.

ARTICLE 39 — AMENDMENTS

39.1 Conditions

The Agreement may be amended, unless the amendment entails changes to the Agreement which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

²² Regulation (EEC, Euratom) No 1182/71 of the Council of 3 June 1971 determining the rules applicable to periods, dates and time-limits (OJ L 124, 8/6/1971, p. 1).

Amendments may be requested by any of the parties.

39.2 Procedure

The party requesting an amendment must submit a request for amendment signed directly in the Portal Amendment tool.

The coordinator submits and receives requests for amendment on behalf of the beneficiaries (see Annex 3). If a change of coordinator is requested without its agreement, the submission must be done by another beneficiary (acting on behalf of the other beneficiaries).

The request for amendment must include:

- the reasons why
- the appropriate supporting documents and
- for a change of coordinator without its agreement: the opinion of the coordinator (or proof that this opinion has been requested in writing).

The granting authority may request additional information.

If the party receiving the request agrees, it must sign the amendment in the tool within 45 days of receiving notification (or any additional information the granting authority has requested). If it does not agree, it must formally notify its disagreement within the same deadline. The deadline may be extended, if necessary for the assessment of the request. If no notification is received within the deadline, the request is considered to have been rejected.

An amendment **enters into force** on the day of the signature of the receiving party.

An amendment **takes effect** on the date of entry into force or other date specified in the amendment.

ARTICLE 40 — ACCESSION AND ADDITION OF NEW BENEFICIARIES

40.1 Accession of the beneficiaries mentioned in the Preamble

The beneficiaries which are not coordinator must accede to the grant by signing the accession form (see Annex 3) directly in the Portal Grant Preparation tool, within 30 days after the entry into force of the Agreement (see Article 44).

They will assume the rights and obligations under the Agreement with effect from the date of its entry into force (see Article 44).

If a beneficiary does not accede to the grant within the above deadline, the coordinator must — within 30 days — request an amendment (see Article 39) to terminate the beneficiary and make any changes necessary to ensure proper implementation of the action. This does not affect the granting authority's right to terminate the grant (see Article 32).

40.2 Addition of new beneficiaries

In justified cases, the beneficiaries may request the addition of a new beneficiary.

For this purpose, the coordinator must submit a request for amendment in accordance with Article 39. It must include an accession form (see Annex 3) signed by the new beneficiary directly in the Portal Amendment tool.

New beneficiaries will assume the rights and obligations under the Agreement with effect from the date of their accession specified in the accession form (see Annex 3).

Additions are also possible in mono-beneficiary grants.

ARTICLE 41 — TRANSFER OF THE AGREEMENT

In justified cases, the beneficiary of a mono-beneficiary grant may request the transfer of the grant to a new beneficiary, provided that this would not call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

The beneficiary must submit a request for **amendment** (see Article 39), with

- the reasons why
- the accession form (see Annex 3) signed by the new beneficiary directly in the Portal Amendment tool and
- additional supporting documents (if required by the granting authority).

The new beneficiary will assume the rights and obligations under the Agreement with effect from the date of accession specified in the accession form (see Annex 3).

ARTICLE 42 — ASSIGNMENTS OF CLAIMS FOR PAYMENT AGAINST THE GRANTING AUTHORITY

The beneficiaries may not assign any of their claims for payment against the granting authority to any third party, except if expressly approved in writing by the granting authority on the basis of a reasoned, written request by the coordinator (on behalf of the beneficiary concerned).

If the granting authority has not accepted the assignment or if the terms of it are not observed, the assignment will have no effect on it.

In no circumstances will an assignment release the beneficiaries from their obligations towards the granting authority.

ARTICLE 43 — APPLICABLE LAW AND SETTLEMENT OF DISPUTES

43.1 Applicable law

The Agreement is governed by the applicable EU law, supplemented if necessary by the law of Belgium.

Special rules may apply for beneficiaries which are international organisations (if any; see Data Sheet, Point 5).

43.2 Dispute settlement

If a dispute concerns the interpretation, application or validity of the Agreement, the parties must bring action before the EU General Court — or, on appeal, the EU Court of Justice — under Article 272 of the Treaty on the Functioning of the EU (TFEU).

For non-EU beneficiaries (if any), such disputes must be brought before the courts of Brussels, Belgium — unless an international agreement provides for the enforceability of EU court judgements.

For beneficiaries with arbitration as special dispute settlement forum (if any; see Data Sheet, Point 5), the dispute will — in the absence of an amicable settlement — be settled in accordance with the Rules for Arbitration published on the Portal.

If a dispute concerns administrative sanctions, offsetting or an enforceable decision under Article 299 TFEU (see Articles 22 and 34), the beneficiaries must bring action before the General Court — or, on appeal, the Court of Justice — under Article 263 TFEU.

For grants where the granting authority is an EU executive agency (see Preamble), actions against offsetting and enforceable decisions must be brought against the European Commission (not against the granting authority; see also Article 22).

ARTICLE 44 — ENTRY INTO FORCE

The Agreement will enter into force on the day of signature by the granting authority or the coordinator, depending on which is later.

SIGNATURES

For the coordinator

For the granting authority



ANNEX 1



Programme for the Environment and Climate Action (LIFE)

Description of the action (DoA)

Part A

Part B

DESCRIPTION OF THE ACTION (PART A)

COVER PAGE

Part A of the Description of the Action (DoA) must be completed directly on the Portal Grant Preparation screens.

PROJECT	
Grant Preparation (General Information screen) — Enter the info.	
Project number:	101167708
Project name:	Continental Replicable One Stop Shop for Financial Innovation Trajectories
Project acronym:	LIFE23-CET-CROSSFIT
Call:	LIFE-2023-CET
Topic:	LIFE-2023-CET-OSS
Type of action:	LIFE-PJG
Service:	CINEA/D/01
Project starting date:	fixed date: 1 September 2024
Project duration:	30 months

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PROJECT SUMMARY

Project summary

Grant Preparation (General Information screen) — Provide an overall description of your project (including context and overall objectives, planned activities and main achievements, and expected results and impacts (on target groups, change procedures, capacities, innovation etc)). This summary should give readers a clear idea of what your project is about.

Use the project summary from your proposal.

CROSSFIT's overarching objective is to transform energy efficiency market dynamics by introducing a game-changing approach: with the set-up of a one-stop shop in the public sector, where complexities in procurement are simplified, and opportunities are seized. Our primary goal is to streamline decision-making, centralize tender procedures at the municipal, regional, and national levels, and captivate the private financial community's active participation.

The EU's mandatory tendering process in the public sector procurement process poses a bottleneck to the energy transition, while at the same time the public sector is intended to lead by example.

CROSSFIT aims to address these challenges, by establishing a "one-stop shop" (OSS) in Greece, Portugal and Spain, modeled after the public sector held Vlaams Energiebedrijf's (VEB) OSS, operating in Belgium since 2004, and successfully remedying to the issues in the public procurement process. Adapting the VEB OSS model to the legal and regulatory frameworks of Greece, Portugal and Spain, the CROSSFITmodel will be applied to shortlisted pilot sites in the respective countries. Furthermore the present VEB model will be upgraded by integrating financial engineering in blending public and private capital, which will also be tested on shortlisted pilots, and evolve into VEB 2.0. In the final phase of crOSSfit, the VEB 2.0 model will be introduced to the OSS in Greece, Portugal and Spain, creating four advanced OSS 2.0 as regional replication templates.

Results will be replicated by pilot leaders themselves and taken to a wider European market by SEFA, the Brussels-based Sustainable Energy Finance Association. SEFA as an not-for-profit organisation will take on the CROSSFIT collateral, build capacity and further deploy the CROSSFIT model in other EU MS, leading to €3 billion capital deployment within 5 years after the project end, and notable CO2 abatement.

LIST OF PARTICIPANTS

PARTICIPANTS

Grant Preparation (Beneficiaries screen) — Enter the info.

Number	Role	Short name	Legal name	Country	PIC
1	COO	JAE	JOULE ASSETS EUROPE SRL	BE	896100357
1.1	AE	JAEG	JOULE ASSETS EUROPE GROUP SRL	IT	912406445
2	BEN	ESC	ENERSAVE CAPITAL SARL	LU	907085219
3	BEN	VEB	VLAAMS ENERGIEBEDRIJF	BE	905466774
4	BEN	SEFA	SUSTAINABLE ENERGY FINANCE ASSOCIATION	BE	881517571
5	BEN	RDA	RDA - CLIMATE SOLUTIONS UNIPESOAAL LDA	PT	939071454
6	BEN	SCN	DIKTYO POLEON GIA TI VIOSIMI ANAPTYXI KAI KYKLIKI OIKONOMIA	EL	907509788
7	BEN	ENER	ENERGIES RENOVABLES PUBLIQUES DE CATALUNYA SAU	ES	880717612

LIST OF WORK PACKAGES

Work packages						
Grant Preparation (Work Packages screen) — Enter the info.						
Work Package No	Work Package name	Lead Beneficiary	Effort (Person-Months)	Start Month	End Month	Deliverables
WP1	Project Management	1 - JAE	29.50	1	30	D1.1 – Project Manual D1.2 – Project Website D1.3 – Progress Report D1.4 – Preliminary KPI report D1.5 – Final KPI report
WP2	Data collection, knowledge transfer and OSS roadmap	3 - VEB	22.50	1	30	D2.1 – Catalogue on data collection methodologies D2.2 – Bundling of the workshop reports D2.3 – Gap analysis per pilot D2.4 – OSS roadmap per pilot: identification of the key success factors and pitfalls related to the energy-related one-stop-shop-service D2.5 – Analysis of the legal framework for OSS in the piloting Member states D2.6 – Blueprint guide ‘One-Stop-Shop’ for Energy Efficiency in the public sector
WP3	Innovative finance for energy transition	2 - ESC	24.90	1	18	D3.1 – Assessment of the state of the art of current funding and financing opportunities in the clean energy transition in the public sector D3.2 – Funding mechanisms catalogue D3.3 – Financing engineering- development of innovative private driven financing mechanisms

Work packages						
Grant Preparation (Work Packages screen) — Enter the info.						
Work Package No	Work Package name	Lead Beneficiary	Effort (Person-Months)	Start Month	End Month	Deliverables
WP4	Pilot Implementation	7 - ENER	46.00	7	24	D4.1 – Shortlisted Projects for tenders in Spain, Greece and Portugal D4.2 – Award criteria and process guideline D4.3 – Implementation strategy and pilot execution in Spain D4.4 – Implementation strategy and pilot execution in Greece D4.5 – Implementation strategy and pilot execution in Portugal
WP5	Capacity building, Lessons learned and monitoring	6 - SCN	29.50	9	30	D5.1 – Lessons Learnt for the Spanish Pilot D5.2 – Spanish Activity Report D5.3 – Lessons Learnt for the Greek Pilot D5.4 – Greek Activity Report D5.5 – Lessons Learnt for the Portuguese Pilot D5.6 – Portuguese Activity Report
WP6	Sustainability, replication and exploitation of project results	4 - SEFA	26.00	1	30	D6.1 – Dissemination, replication and exploitation plan D6.2 – Final report on dissemination activities D6.3 – Post-project exploitation plan for Spain D6.4 – Post-project exploitation plan for Greece D6.5 – Post-project exploitation plan for Portugal D6.6 – Report on the finalisation of CROSSFIT collateral and replication strategy

Work packages						
Grant Preparation (Work Packages screen) — Enter the info.						
Work Package No	Work Package name	Lead Beneficiary	Effort (Person-Months)	Start Month	End Month	Deliverables
						D6.7 – Final Publishable Report
WP7	Communication and Stakeholder Engagement	5 - RDA	21.00	1	30	D7.1 – Communication and outreach plan and Visual identity D7.2 – Stakeholder mapping D7.3 – Capacity building programme plan and materials D7.4 – Round tables Reports- Spain D7.5 – Round tables Reports - Greece D7.6 – Round tables Reports - Portugal

Work package WP1 – Project Management

Work Package Number	WP1	Lead Beneficiary	1 - JAE
Work Package Name	Project Management		
Start Month	1	End Month	30

Objectives

The overall objective of WP1 is to safeguard a smooth and target-driven management and implementation of the project, in line with time- and budget-related constraints. WP1 interacts with all other WPs and will be the interface between the consortium and the European Commission.

Description

T1.1 Set-up of project management and data access policies (M01-M06), Lead: JAE, Participant: All Partners

The aim of this task is to set up the following management processes at the beginning of the project:

- WP implementation plans, internal reporting protocol, subcontracting protocol, internal information/data exchange platform, etc.
- Development of a detailed implementation plan for the project, including per WP as well as a clear division of work into sub-tasks and allocation of roles and responsibilities within the consortium. This will also include the relevant guidelines and templates for this purpose and work plans per WP, to be developed by respective WP and task leaders in synergy with the WP1 lead/s;
- Internal reporting on the progress per WP; internal reporting on the use of the resources per partner (every 6 months);
- Establishment of standard operating procedures for general management tasks among WP1 and other WP leads, such as monitoring project progress, drafting, reviewing and submitting deliverables and reports, etc.;
- Establishment of an internal platform for data exchange between project partners and subcontractors;
- Development of guidelines for dissemination, exploitation and communication activities.

WP1 will also develop a project website and a data access policy, with the relevant processes and guidelines to be documented in the Project Manual. Together with the CROSSFIT project website, all partners will create a dedicated project webpage on their respective company or organisation website highlighting their involvement in CROSSFIT and linking to the project website.

T1.2 Day-to-day activities to coordinate and run the project (M01-M30), Lead: JAE, Participant: All Partners

To ensure good communication and alignment between project partners, the WP1 leads will hold monthly conference calls to monitor the status of project progress with all consortium partners.

In addition, the consortium will benefit from an effective knowledge and information system to be set up by the WP1 leads, i.e.: a virtual space for files, folders, project documents and templates for reports and deliverables to be used by project partners and available through the internal platform mentioned in the T.1.1 description above. T.1.2 will also include a review and development of the standard operating procedures established in T.1.1, particularly with regards to the internal review process for deliverables, to ensure their quality.

T1.3 Project reporting (M09, M19-M20), Lead: JAEG, Participant: All Partners

This task will deliver a progress report following the first 9 months of the project, an intermediate report covering Reporting Period 1 and a final report describing project progress and outcomes, in line with the respective requirements of the funding instrument and with the timescales indicated in this proposal.

T1.4 Evaluation of project KPIs and quantified impacts (M01-M30), Lead: JAEG, Participant: All Partners

In this task, all relevant data from the crOSSfit project implementation regarding the project KPIs set in chapter 1.2, as well as the quantified impacts described in chapter 2.1, will be gathered, calculated and reported.

T1.5 IPR management (M01-M30), Lead: SEFA, Participant: All Partners

This task will focus on the monitoring and the management of intellectual property rights (IPR) that may evolve throughout the course of the project.

T1.6 Advisory Board set-up and management (M01-M30), Lead: SEFA, Participant: All Partners

The crOSSfit consortium will contact 5-8 industry experts from their respective network to join the CROSSFIT Advisory Board. The Advisory Board will convene quarterly and provide expert advice on the core direction and elements to be developed in the project. Specifically for WPs 2 and 3, the Advisory Board will provide valuable inputs and feedback and add credibility and quality to the overall framework design and deployment.

T1.7 Common information and dissemination (M01-M30), Lead: SEFA, Participant: All Partners

The CROSSFIT consortium will contribute, upon invitation by the Agency, to common activities related to information (like reporting on impact indicators), dissemination and visibility, and synergies with other LIFE and EU supported actions.

Work package WP2 – Data collection, knowledge transfer and OSS roadmap

Work Package Number	WP2	Lead Beneficiary	3 - VEB
Work Package Name	Data collection, knowledge transfer and OSS roadmap		
Start Month	1	End Month	30

Objectives

The aim of this work package is to collect the fragmented and continuously changing data existing in a complex and rapidly changing energy and building stock landscape. We aim to map this landscape as accurately as possible and bring together the most important results and recommendations towards successful replication of the VEB model in the 3 pilot countries and provides an overview of how they were achieved. To this end, we will collect data to evaluate the current state of play in the target countries, and effectively share knowledge with the project partners, stakeholders in the pilot countries and eventually with the general public to raise awareness about the challenges and opportunities concerning the Clean Energy Transition in the particular area of the Energy Efficiency in the Buildings. The knowledge gathered with this WP will be monitored and regularly updated. The objectives of the WP will be reached by:

- Assessing current systems, processes, and practices to pinpoint knowledge gaps and areas requiring knowledge transfer.
- Identifying the core success factors of the VEB model and establishing a repository of guidelines. These guidelines will empower pilot stakeholders to replicate the VEB model effectively in WP4
- Developing a comprehensive knowledge transfer strategy, encompassing methods like capacity building and guideline documentation, to ensure efficient knowledge dissemination.

This will result in a successful deployment of the pilots in WP4 Pilot Implementation and will contribute to the success of WP3 Innovative finance for energy transition and WP6 Sustainability, replication and exploitation of project results

Description

T.2.1 Initial assessment, data collection plan and gap analysis (M01-M09), Lead: ESC - Participants: VEB, SCN, RDA, ENER

The goal of this task is to deliver a gap analysis between the requirements for an operational one-stop-shop in energy efficiency (satisfaction, which specific services to include, what political support is required, status of e-government, what scope and objectives, a mapping of the stakeholders, the availability of expertise and resources, formation of an OSS core group, methodologies for data analysis and the pooling of buildings, evaluation methodologies...) and the state-of-the-art at the piloting organisation. To that extent 3 workshops will be held between each of the pilot organisations, VEB and ESC.

A first workshop will be held on knowledge transfer from VEB to the pilot countries. The identified best practices and methodologies for data collections will be shared that can be used to collect data in each of the pilot countries. In order to facilitate future renovations or other energy-related implementations, it will indeed be crucial to gather data on building characteristics and energy consumption. During the second one, the retrieved data will then be evaluated and in case essential variables are missing, an appropriate strategy to approximate the values will be discussed. During the third workshop, VEB, ESC and each pilot organisation will conclude the gap analysis by forming an OSS core group for each pilot organisation, including the respective relevant stakeholders. This group will join the sessions in the next task with the aim of creating a roadmap.

Outcomes: tools/methodology for data collection, report on best practices and identified gaps for delivering a one-stop-shop

T.2.2 Key success factors identification and OSS roadmap development per pilot (M04 – M12), Lead: VEB – Participants: ESC, SCN, RDA, ENER

An essential aspect before starting the knowledge transfer is the introspection towards the VEB organisation, as stated in section 1.4. To that end, VEB held a critical review of its collaboration with the Flemish government. An online questionnaire was held by external reviewers Transition Stories and Suma Consulting, resulting in 305 respondents

expressing their opinion on the collaboration with VEB. The questionnaire involved some general questions for all respondents. Still, it was possible to indicate whether your role was that of a customer (235), not-customer (37), operational partner (supplier or contractor) or strategic partner (remainder). In order to compensate for the low degree of response in the latter category, in-depth interviews were held. This enabled VEB to get a thorough grasp of its position on overall satisfaction about several one-stop-shop features (energy generation, savings, supplying activities, Terra, VEB's role as an innovator). The report of the questionnaire led to the identification of key success factors for VEB and can serve as a stepping stone towards future critical reviews. It will be an important resource to work from in the purpose of the knowledge transfer to the pilots.

Based on this VEB experience gathered during the establishment of the OSS in Flanders, a set of success factors will be shared within the pilot countries: Spain, Greece and Portugal.

The first part of this task will be dedicated to the further exploration of success factors of VEB. In the second part, starting from the gap analysis in task 2.1, workshops will be held with the pilot countries to shape a roadmap towards the operationalization of the one-stop-shops in energy efficiency. The roadmap will define priority areas for action and intended key outcomes.

Here, at least 2 workshops, webinars or hands-on sessions will be held in which we determine which elements are truly essential to prepare and start the pilots, in which aspects the assistance of VEB will be crucial and of added value to pilot regions, and which elements are of the most value to every specific situation, considering the country/region specific characteristics, peculiarities and situations.

Outcome: an OSS roadmap for each pilot country.

T.2.3 Analysis of the Legal and Regulatory Framework at each piloting Member state (M04-M12), Lead: ESC-Participants: ENER, RDA, VEB, SCN

Building on the gap analysis and the roadmap of tasks 2.1 and 2.2, the intended key services of the one-stop-shop will be revealed. In order to operationalize these, an appropriate legal structure will have to be found. Therefore, an analysis on the legal status (e.g. central purchasing body, or a rather facilitating procurement agency) that each OSS can embody, will be done at a national level in each of the piloting country. Each status will carry advantages, disadvantages, and a potential scope of activities. The intention is to deliver a clear overview of all these aspects such that the legal body of the eventual OSS can be chosen accordingly.

Outcome: an overview of the legal aspects (European, national, regional and even municipal) to consider when establishing a one-stop-shop in the 3 piloting countries Spain, Greece and Portugal.

T.2.4 Technical tendering catalogue (Blueprint on OSS model, guidelines and templates) (M07-M30), Lead: VEB, Participants: All partners

Within this task we will analyse the public procurement procedures in the relevant countries, with a special focus on tendering criteria (price, time, quality, financial KPI's for contractors, safety aspects, simulation cases, circularity principles, geographical considerations, qualitatively high ambitious level and so forth). We will then develop a collection of best practices, guidelines and templates that will serve as the blueprint for successful implementation of the OSS' in WP4. This collection of templates will also involve the inclusion – and where required, adaptation – of standardised project finance collateral that partner SEFA has established as benchmarking tools in previous actions (LAUNCH H2020 & PROPEL H2020). These project finance materials cover standardized contracts, risk assessment, ESG, KYC and further aspects. Applying such standards to the procurement process will ensure better quality, faster evaluation and higher likelihood of third-party finance to be engaged in these projects.

Outcome: Blueprint documents on OSS on energy efficiency in general. The 1st draft will be shared with the partners in M16 (see Milestone 2).

Work package WP3 – Innovative finance for energy transition

Work Package Number	WP3	Lead Beneficiary	2 - ESC
Work Package Name	Innovative finance for energy transition		
Start Month	1	End Month	18

Objectives

This work package has a dual objective. Firstly, it aims to empower public sector stakeholders in the piloting countries: Spain, Portugal and Greece by providing them with the knowledge of financing structures, but also underline the expectations and requirements of the financial sector. This will be achieved through the creation of a funding mechanism catalogue and the establishment of project financing /deployment, along with co-demonstration initiatives with local municipalities.

Secondly, the work package seeks to develop a financing mechanism by bundling similar small-scale energy-saving measures into larger tenders. This strategy is designed to attract private sector investment into the public sector's energy transition. The goal is to provide VEB with a new a financing mechanism supporting the deployment of projects in energy efficiency within the built environment with a specific focus on deep renovations. The approach involves examining existing funding methods, collaborating with financial partners, leveraging the expertise from H2020 projects like LAUNCH, PROPEL, ENERGATE and the cumulative expertise of ESC, JAE and SEFA

Description

T.3.1 State of the art of current funding and financing opportunities (M01-M09), Lead: ESC, Participants: JAEG, SEFA, VEB

This task will focus on a comprehensive assessment of existing financing tools and instruments typically used at municipal level to finance small scale energy related interventions. This task will include on the one hand the analysis of why many tenders, calling for funded solutions fail and a comprehensive analysis of the currently available financing approaches (e.g. ESCO, project financing, public/private co-funding, on-bill, EPC, as a service) and funding sources identifying specific features, limitations, and opportunities. This assessment will be performed via engagement with the public sector stakeholders, dedicated financing stakeholder's workshops, bilateral engagements/meetings and desk research.

T.3.2 Financial Institutional Stakeholder engagement for financing tools/project identification (M01-M09); Lead: JAEG, Participants: SEFA, ESC

This task leverages the investor and finance community assembled by JAE and other partners (refer to the 11 letter of support). The community is dedicated to actively participating in the project, sharing insights for innovative financing tools, validating project results, and comprehending opportunities in the EU's energy transition landscape. The CROSSFIT consortium will establish a representative financing stakeholders' advisory group to gather input, address objections, and align the tendering and finance processes efficiently within tight timelines.

T.3.3 Create a funding mechanisms catalogue (M07-M15); Lead: SEFA, Participants: JAEG, ESC, VEB

In this task, a comprehensive catalogue of financing mechanisms and solutions encompassing both conventional and innovative and options will be developed wrapping up results from T3.1 to T3.2 and preliminary results from T3.4. The goal is to provide a robust array of financial instruments and processes suitable for the financing of various aspects of bundling of small-scale energy projects and to connect it to the pilot phase in WP4. This catalogue will serve as a valuable reference resource, offering a diverse toolkit for project stakeholders, enabling them to select the most appropriate financing mechanism for their specific needs and circumstances, thereby promoting flexibility and effectiveness in the reconstruction efforts. Furthermore, such catalogue, in each of the national languages (of the pilots) and English will be used in the replication effort within the pilot counties and then in the second line pilot countries as a reference tool of best practices and implemented detailed case studies, showing process, tools used, and outcomes and reasons for success and in particular failures.

T.3.4 Financial engineering- innovative private driven financing mechanisms development (e.g. funding structures, warehousing, special purpose vehicle) (M07-M18); Lead: ESC, Participants: VEB, JAEG

This task is dedicated to the identification and development of pioneering financing methods tailored to debt and equity funds, banks and private driven investors and interventions whilst integrating where possible available grants. It will also identify and create new and innovative financing mechanisms that can more effectively address the unique legal and technical requirements of the public sector mandatory tendering process. It encompasses a multifaceted approach that involves the exploration of new financial instruments, standardization combined with bundling, innovative partnerships with local and international stakeholders, and the creation of sustainable private financial models keeping an eye on the ESG and EU Taxonomy compliance aspects of the financing instrument, as required by investors at large.

Work package WP4 – Pilot Implementation

Work Package Number	WP4	Lead Beneficiary	7 - ENER
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Work Package Name	Pilot Implementation		
Start Month	7	End Month	24

Objectives

The main objective of this work package is to deploy the VEB model in the public procurement process in the selected piloting countries building upon the work delivered in WP2 and WP3. The objective will be achieved by ensuring that the projects definition (tenders related), the awarding criteria and process are being laid out at the beginning of this work package. Once this first step is being delivered then each of the piloting country will deploy the tendering process based on the collateral and know-how developed in WP2 and WP3.

Description

T.4.1 Projects definition with the piloting entities via co-creation methods (M07-M12) Lead: ESC, Participants: ENER, SCN, RDA, VEB

This task commences with a 'needs assessment,' identifying the selected stakeholders (public entities) energy-related needs and objectives. The assessment will include identifying areas for renewable energy integration, energy efficiency improvements, emissions reduction etc. During this phase, the municipalities and relevant stakeholders will collaborate to select projects that align with the region's and country's energy goals and sustainability objectives. These projects could encompass various initiatives, such as the development of renewable energy installations, energy efficiency improvements, or electrification of transportation.

This exercise will result in first of all a shortlist of projects for tenders that the stakeholders already identified (municipalities, OOS or other similar entities) want to proceed with will be provided clearly define the objectives and scope of the pilot, including what goods or services will be procured, the budget, and the expected outcome. In order to assess and develop a tailor solution to the different pilots identified co-creation sessions will be needed to deliver the best financial scheme to the shortlisted pilots. This entails close coordination and cooperation with local municipalities, ESCO's and financing stakeholders in the piloting countries to showcase the effectiveness and feasibility of the project's solutions within the specific community contexts within the prescribed timelines of public tenders and understanding and aligning the needs of the municipal tendering process with the requirements as to size, substance and possible addition specifications of the financial sector. This task will involve pilot projects and on-the-ground demonstrations in the next tasks in WP4 ensuring that the financial propositions and innovations are not only technically sound, but also responding to the unique needs and dynamics of the local municipalities tender process, further enhancing the project's impact and relevance to be monitored via project KPI (T1.4).

T.4.2 Awarding criteria and process (M07-M12), Lead: ESC, Participants: ENER, SCN, RdA, VEB

The municipal tendering process, from subject description to awarding, is fraught with challenges. Creating a catalogue of transparent and measurable criteria for awarding energy efficiency and deep retrofit funded solutions aims to enhance the attractiveness of municipal tenders. This, in turn, is anticipated to increase participation and yield better outcomes for municipalities. A key obstacle for potential participants is the perceived lack of objectivity in the awarding process. The "OSS" process seeks to address this by aligning with the EU's Grant awarding mechanics, introducing a transparent process with a pre-announced grading system. This approach provides clear indications to applicants about the priorities of the "OSS."

T.4.3 Implementing the tender process in Spain across various pipelines (M013-M24), Lead: ENER, Participants: ESC, SEFA

Once T4.1 and T4.2 are delivered ENER will be able to deploy the tender for the 3 pilots cases presented in the Impact section. The preparation of the procurement process was done via the prior tasks in WP4. The pilot cases are structured to follow the below steps:

Pilot Framework: Once the projects are identified, a comprehensive framework will be developed. This framework will outline the rules, guidelines, and procedures for conducting the tendering process. It will define the criteria for project evaluation, qualification requirements for potential suppliers, and other essential parameters. The framework will ensure that the tendering process is transparent, fair, and aligned with sustainability objectives.

Solicitation of Bids: The public tender will be issued, inviting suppliers to submit their bids for the specified goods or services. The next step involves issuing public tenders with invitations that are extended to suppliers and service providers interested in participating in the projects. The tender could document detail project specifications, requirements,

timelines, evaluation criteria, and other relevant information. Consequently, suppliers will respond with their proposals, offering solutions that match the project's objectives.

Bid Evaluation: The submitted bids will then be evaluated based on predetermined criteria. These criteria will include factors such as the technical feasibility of the proposed solution, the environmental impact, the cost-effectiveness, and the experience and qualifications of the supplier. The evaluation process will be conducted impartially to select the most suitable suppliers. **Contract Award:** Building upon the work in T4.2 and after careful evaluation, contracts should be awarded to suppliers who meet the established criteria. The selected suppliers then will proceed with the implementation of the sustainable energy projects.

The expected outcome for this task is to become a blueprint for facilitating the tendering procedures for sustainable energy projects, as it will serve as centralized entities that offer various services to streamline and support the process.

Furthermore, the project team will monitor the progress of awarded projects, ensuring they align with the scope, technical requirements, and environmental standards. Reports on the progress of the pilots to stakeholders and the public will be made and training and capacity-building activities will be offered to educate all stakeholders involved in the tendering process this will take place in the dedicated WP5 Capacity building, lessons learned and monitoring (T5.2, T5.3 and T5.4 and T5.5) whilst capturing the impact of the project KPI (T1.4) and monitoring of the pilot (T5.1).

T.4.4 Implementing the tender process in Greece across various pipelines (M13-M24), Lead: SCN, Participants: ESC, VEB

After the completion of T4.1 and T4.2, SCN will adhere to the identical framework, steps, and structure outlined in T.4.3 (tender process in Spain). Should the results of T2.3 Analysis of the Legal and Regulatory Framework indicate legal distinctions in the process or documentation needed among the selected piloting countries, these variations will be incorporated into the ongoing task.

T.4.5 Implementing the tender process in Portugal across various pipelines (M13-M24), Lead: RDA, Participants: ESC. After the completion of T4.1 and T4.2, RdA will adhere to the identical framework, steps, and structure outlined in T.4.3 (the tender process in Spain). Should the results of T2.3 Analysis of the Legal and Regulatory Framework indicate legal distinctions in the process or documentation needed among the selected piloting countries, these variations will be incorporated into the ongoing task.

T.4.6 VEB pilot testing: Validating and Refining Solutions (M19-M24), Lead: VEB, Participants: ESC, SEFA, JAE After the completion of T3.4 Financial engineering- innovative private driven financing mechanisms development, VEB will advance to the next stage by validating the models developed in T3.4 with the selected projects within their pipeline. This pivotal step marks the transition from theoretical and conceptual groundwork to practical implementation, allowing for the validation and refinement of the proposed solutions through feedback rounds and eventually real-world pilot testing. This comprehensive approach serves as a crucial milestone in the iterative process, allowing for continuous improvement and adaptation based on tangible results and feedback from the selected projects. The results, know-how and lessons learned during this task will be captured in D2.6, whilst capturing the impact and monitoring of project KPI (T1.4).

Work package WP5 – Capacity building, Lessons learned and monitoring

Work Package Number	WP5	Lead Beneficiary	6 - SCN
Work Package Name	Capacity building, Lessons learned and monitoring		
Start Month	9	End Month	30

Objectives

The main objective of this work package is to monitor and assess the impact of CROSSFIT and improve the knowledge, understanding and expertise of stakeholders across the piloting countries with the creation, the organisation and the deployment of one stop shops in the public sector related to the sustainable energy financing.

Specific focus is given on training and equipping public stakeholders in the sustainable energy area to grow their capacity and develop/acquire the expertise to deliver high quality tenders and guidelines and enable access third-party finance (if and when needed). This in turn will support the market growth and help scaling and acceleration of investment into sustainable energy in the built environment in the public sector.

Capacity building activities will be built upon the lessons learned in each of the main piloting countries: Spain, Greece and Portugal. This WP will develop high-quality educational materials to train the stakeholders across different education settings (self-paced/classroom, physical/online/hybrid, in different languages). In addition, the project will continue to work directly with SEFA's existing and growing network of actors (from the LAUNCH and PROPEL projects), consisting of over 500 active contacts across the sustainable energy financing value chain, to expand its reach across Europe.

Description

T.5.1 Monitoring and impact assessment of pilots (M10-M30), Lead: SCN, Participants: All partners

In the context of this task the work package leader will play a pivotal role in overseeing, evaluating, and ensuring a successful accomplishment of pilots objectives. This involved continuous checks for any potential deviations, delays or issues with a focus on making improvements throughout the projects duration. Regular performance monitoring will be conducted to track the progress of the pilots.

T.5.2 Capacity building and Lessons learnt from the piloting phase Spain (M22-M30), Lead: ENER, Participants: JAE, ESC, SEFA.

Task T.5.2 meticulously examines the Spanish pilot project in the crOSSfit initiative, identifying strengths, weaknesses, and key insights. ENER collaborates with stakeholders to distill lessons and challenges, translating them into practical guidelines for future projects. This comprehensive evaluation covers project selection, stakeholder engagement, and tendering assistance. The task enables adjustments based on lessons learned, enhancing criteria, engagement approaches, and the pilot framework. Insights from the Spanish pilot phase are shared with the project team, fostering knowledge transfer to other regions.

Task T.5.2 plays an important role in the project's success, ensuring that the experiences from the Spanish pilot phase are leveraged to enhance future plans. Capacity building activities (such as workshops, webinars, in person meetings, seminars) will be held to share knowledge and build capacity within the pilots' stakeholders, enhance knowledge and skills and foster collaboration among all stakeholders. The goal is to show how it can be applied and adapted in other locations in Spain. More specifically, 3 activities will be carried out, focusing on exploiting the results of the pilot phase. Upon completion of Task T.5.2, a comprehensive document, D.5.1, containing lessons learned, best practices, and recommendations from the Spanish pilot phase will be compiled. Task T.5.2 will also include D.5.2 which will focus on reporting the important issues raised during the capacity building activities.

T.5.3 Capacity Building and Lessons learnt from the piloting phase Greece (M22-M30), Lead: SCN, Participants: JAE, VEB, ESC

Task T.5.3, focuses on gathering and distilling valuable lessons learned from the piloting phase of the tender process in Greece. SCN in collaboration with relevant stakeholders, aims to capture insights, best practices, and challenges encountered during the piloting of sustainable energy procurement initiatives.

T.5.3 will comprehensively evaluate the Greek pilot project, covering project selection, stakeholder engagement, and the tender process assistance. The task systematically identifies challenges, barriers, and successful experiences, documenting them as best practices. It provides an opportunity to propose adjustments and recommendations for project selection, stakeholder engagement, and framework development. Lessons and best practices from the Greek pilot phase will be shared with the project team and stakeholders, enhancing future efforts.

Capacity-building activities, including workshops and webinars, will disseminate knowledge and enhance skills among stakeholders. Three focused activities aim to leverage pilot outcomes, demonstrating effective knowledge application in diverse Greek locations. Task T.5.3 concludes with a comprehensive document, D.5.3 Lessons Learnt from the Greek Pilot, providing valuable insights, issues, solutions, and best practices for refining the project's approach in subsequent phases. Task T.5.3 will also include D.5.4 which will focus on reporting the important issues raised during the capacity building activities.

T.5.4 Capacity building and Lessons learnt from the piloting phase Portugal (M22-M30), Lead: RdA, Participants: JAE, SEFA, ESC

Following the activities in T5.2 and T5.3, Task T.5.4 also involves a thorough examination of the pilot project conducted in Portugal, with a focus on identifying both its strengths and weaknesses. In collaboration with relevant stakeholders, RdA aims to capture valuable lessons, best practices, and challenges encountered during the piloting phase. The aim is to gain significant knowledge from the execution, operation and implementation of the project. These insights will then be translated into practical guidelines, providing a clear framework for using the Crossfit project in future efforts. The evaluation will cover all aspects of the pilot project, including project selection, stakeholder engagement, and assistance provided in the tender process.

Task T.5.4 enables the proposal of adjustments and recommendations based on lessons learned from the Portuguese pilot phase. This includes potential improvements to project selection criteria, stakeholder involvement, and the pilot framework. Lessons and best practices will be shared with the project team and stakeholders, facilitating knowledge transfer to other countries and regions.

The task also investigates effective practices from the pilot phase, aiming to identify replicable strategies for future applications. T.5.4 is pivotal for project success, leveraging insights from the Portuguese pilot to enhance future efforts.

Capacity-building activities, such as workshops and webinars, will be conducted to share knowledge and strengthen stakeholder capacities. These activities will showcase how gained knowledge can be applied in different Portuguese locations, with three specific activities focusing on exploiting pilot phase results.

These activities will contribute to the completion of the project D.5.5 Lessons Learned from the Portuguese Pilot, which will include the accumulated knowledge from the pilot phase, the problems encountered, the solutions implemented, and the best practices developed. In addition, the task will include D.5.6, indicating the minutes of the capacity building activities that will be carried out.

T.5.5 Lessons learned via the VEB pilots testing: validation and refining solutions (M22-M30), Lead: VEB Participants: JAE, JAEG, ESC, SEFA, SCN, RdA, ENER

VEB will ensure that the knowledge and lessons learned from T4.6 are captured and integrated in D2.6 and included in T5.1 and KPIs (T1.4). The lessons learned during T4.6 will serve as a foundation for continuous improvement ensuring that challenges and experiences are being captured and will contribute to the success of subsequent projects and will be disseminated by the consortium partners in WP7.

Work package WP6 – Sustainability, replication and exploitation of project results

Work Package Number	WP6	Lead Beneficiary	4 - SEFA
Work Package Name	Sustainability, replication and exploitation of project results		
Start Month	1	End Month	30

Objectives

The key objectives of WP6 are to establish key pathways for exploitation of the project results, ensuring its long-term success. Opportunities to scale the pilot models within the 3 respective pilot countries, as well as further replication of the CROSSFIT model in other EU MS will be identified and prepared for in this WP. Outreach and dissemination activities in WP6 will build upon the previous communication and promotional efforts undertaken by SEFA and its founding members during the LAUNCH and PROPEL projects. During the combined 5+ years, in fact, these projects have been able to reach more than 800 stakeholders, among which EE Project Developers, investors, consultancies, media, European and national associations and policymakers. The number of interested stakeholders is expected to grow considerably in CROSSFIT due the increased geographical scope and continued engagement of national and industry associations acting as channel partners.

Description

T.6.1 Develop dissemination, replication and exploitation plan (M01-M30) Lead: SEFA, Participants: ENER, RDA, SNC
The establishment of SEFA as the resource and knowledge centre for sustainable energy industry along with the CROSSFIT partners having been working in the sustainable energy sector for many years and have extensive networks. This will enable the consortium to involve key stakeholder groups and the wider public from a very early stage. To maximise the effect, a detailed dissemination, exploitation, and replication plan (DREP) will be established in the first months of the project. The DREP will be influenced by the pilot implementation timelines in WP4, as well as the engagement schedules in WP7.

The DREP will include:

- Stakeholder network expansion: All partners will work to expand their existing stakeholder networks across the EU through dissemination, exploitation, and replication activities.
- A calendar of events of high relevance to the CROSSFIT project work
- Communication and dissemination of activities and key learnings from pilots.
- Management of new unforeseen potential post-project exploitation opportunities

T.6.2 Delivering dissemination activities and events (M13-M30) Lead: RDA, Participants: All partners

The dissemination of project results will also be delivered by the project partners according to the agreed DREP created in T6.1. All partners will be assigned to participate at dissemination events according to the event calendar included in the DREP. Event participation for different partners will be organised well in advance to secure speaking slots (e.g., via the submission of essays/abstracts) and exhibition booths.

The full range of dissemination activities and events will include:

- CROSSFIT forums, workshops and events will be organised including educational and training workshops, discussion forums and more. CROSSFIT will also organise 2 high-level events targeting not only the range of stakeholders engaged through other activities, but also including policy makers, media, academia and the general public.
- All CROSSFIT partners will participate in national and international conferences and exhibitions, securing speaking slots and booking exhibition booths, as appropriate. Over the duration of 2,5 years, CROSSFIT partners will attend more than 20 events and conferences, sharing key findings and materials. These events will include the EU Sustainable Energy Week, the IEA Annual Forum; International Conference on Energy Efficiency in Domestic Appliances and Lighting, Covenant of Mayors Investment Forum, Smart Cities Marketplace Forum, ESCo conferences, World Sustainable Energy Days, technology and industry fairs such as AEE, MCE and SEAI, real estate conferences such as MIPIM and REAL, SEIF forums, EEFIG meetings, national association events and more.
- All the required CROSSFIT material, tools and content will be translated for the new focus countries to lower information barriers and increase engagement.
- Articles on the project results, and other PR activities in the last 3 months of the project (for which the support of a PR firm will be subcontracted).
- Co-creation activities with SEFA such as;
 - o Participating in and hosting dedicated networking events that will focus on sharing CROSSFIT's findings in target countries.
 - o Multiple cycles of outreach campaigns to invite stakeholders identified in task 6.1 to engage with the CROSSFIT project.
 - o Promotion of SEFA guidance package on the CROSSFIT model for further replication.

Sub-task 6.2.1: Social networks (M07-M30), Lead: RDA, Participants: All Partners

CROSSFIT will capitalise on the existing LinkedIn and Twitter social media networks to spread awareness and attract a wider audience beyond project stakeholder and look to create new partnerships and cross-promotional activities with other EU funded projects. All partners will contribute to the promotion of social media posts through their respective channels. National associations, in particular those in the 3 focus countries will be asked to activate their respective network for targeted outreach, too.

Sub-task 6.2.2: Targeted outreach through existing channels (M07-M30), Lead: RDA, Participants: All Partners

The partners will conduct tailored outreach for replication, engagement and collaboration, including Letter of Support signatories, previously engaged LAUNCH H2020 and PROPEL H2020 stakeholders, active LIFE and HEU sister projects, national ESCo, technology and business associations representative of the sustainable energy sector across the EU.

T.6.3 Establishment of regional/national OSS offering in Spain for post-project exploitation (M13-M30), Lead: ENER

The Spanish pilot leader will establish a post-project OSS offering as the key pathway to further exploit the successfully tested CROSSFIT model. This OSS offering could either be established directly within ENER or jointly with municipal or regional authorities participating in the respective pilots. This work will include the development of a detailed business plan and sustainability strategy on how the OSS model will be offered post-project, securing its long-term success.

T.6.4 Establishment of regional/national OSS offering in Greece for post-project exploitation (M13-M30), Lead: SCN

The Greek pilot leader will establish a post-project OSS offering as the key pathway to further exploit the successfully tested CROSSFIT model. This OSS offering could either be established directly within SCN or jointly with municipal or regional authorities participating in the respective pilots. This work will include the development of a detailed business plan and sustainability strategy on how the OSS model will be offered post-project, securing its long-term success.

T.6.5 Establishment of regional/national OSS offering in Portugal for post-project exploitation (M13-M30), Lead: RDA

The Portuguese pilot leader will establish a post-project OSS offering as the key pathway to further exploit the successfully tested CROSSFIT model. This OSS offering could either be established directly within Porto Energy Hub or jointly with municipal or regional authorities in the case of the Almada pilot. This work will include the development of a detailed business plan and sustainability strategy on how the OSS model will be offered post-project, securing its long-term success.

T.6.6 Consolidation of the CROSSFIT collateral for further replication through SEFA (M25-M30), Lead: SEFA

All the collateral that was developed, refined and applied during the CROSSFIT project will be gathered and organised specifically for further replication in other EU Ms by SEFA. This CROSSFIT collateral will include the tender procedure and documents, financial structures, but also the networks, training materials, processes and findings from the pilots in Belgium, Greece, Portugal and Spain. These will be reviewed from the point of view of ensuring all materials are streamlined, form a useable unit, and meet the needs and requirements of complementing SEFA's offering to public sector actors with regards to sustainable energy finance. All finalized collateral will be integrated into the existing SEFA IT platform. A replication strategy will be developed by identifying suitable countries or regions for applying the CROSSFIT one-stop-shop model post-project. The project will prepare a final publishable report presenting the key results, main lessons learnt, and recommendations for the future. The final publication will be professionally designed, attractive and tailored to the target group. The content and final draft of the publishable report will be discussed with CINEA before publication.

Work package WP7 – Communication and Stakeholder Engagement

Work Package Number	WP7	Lead Beneficiary	5 - RDA
Work Package Name	Communication and Stakeholder Engagement		
Start Month	1	End Month	30

Objectives

The objective of WP7 is to support other WPs in the engagement of stakeholders, by hosting a range of dedicated stakeholder groups and forums, ensuring common brand and identity, crafting general and customised messages, and developing relevant communication collateral as appropriate.

As multiple groups of stakeholders will be involved throughout the project duration and beyond, communication and coordination between these groups is very important. WP7 will thus ensure full alignment with WP5 and WP6, support WP2 and WP4 work with dedicated forums of stakeholders and contribute to the success of WP2 by financial institutions representatives. WP7 will also create all the necessary branding, messaging and communication collateral for dissemination in WP6. Two round table events per country will be carried out as to support replication and exploitation of the project results. A first roundtable will be held within the pilot cities, while a second one intends a broader audience being intended to target a nationwide audience.

Description

T.7.1 Communication and outreach plan, incl. branding (M01-M06) Lead: RdA, Participants: All partners

This task will establish the common language, branding and image for CROSSFIT. An integrated Communication and outreach plan (including Social Media Strategy) will be drafted (M06). @CROSSFIT channels will be launched in M07, in at least the pilots' languages (Spanish, Greek and Portuguese) plus English. The strategy and Communication and outreach KPIs will be reviewed and updated annually.

A design company will be hired to design the project branding, under the supervision of RdA and support from all partners. The materials to be developed within branding consist of, but are not limited to, project logo, set of templates, general poster, and leaflets (general and concrete target groups) in both digital and paper formats, in the four languages.

T.7.2: Stakeholder mapping (M01-M06), Lead: RdA, Participants: All partners

Identifying of stakeholders, the diversity among them, their needs, barriers, and knowledge, potential or expected role and the variation of their (local) communication channels/means. This includes how they are networked, i.e. whether they are connected to clusters, regional/provincial networks, specific network or advocacy organisations. The stakeholder mapping (D7.2) will feed into the other WP and will take the lead and organise the collaboration of all partners. RdA will be leading the identification of communication means.

T.7.3 Capacity Building and training programme outside of the project beneficiaries (M13-M30), Lead: SEFA, Participants: All partners

Based on the work from WP2 to WP5, this task will focus on delivering the capacity building programme and materials to stakeholders outside the pilots. SEFA, supported by all partners will develop the materials for the actions in all the four languages.

The programme will be delivered not just linking to the relevance of sustainable energy measures and energy efficiency, but also business models and funding mechanisms which can be used to renovate public buildings. The programme

will consist of a roadshow of round tables across the pilot countries (following tasks) to public authorities and building managers representatives. The programme will also account for actions to engage and build capacity other relevant stakeholders willing to follow and replicate CROSSFIT. This capacity-building and training programme will involve developing materials to be delivered presenting the projects aim, scope, method and main results. This task will contribute to the Capacity-building programme plan and materials (D7.3). All materials will be freely available at CROSSFIT website.

T.7.4 Expansion and engagement of Spanish findings via round tables for Spanish regional governments (M16-M30), Lead: ENER, Participants:

This task and the following (T7.5 and T7.6) aim to support WP6 in the replication and exploitation of CROSSFIT results through for each pilot country. This task in specific focuses in Spain.

The events will be designed to involve local authorities' key stakeholders (up to 20 participants per session) upon personal invitation. During the roundtables, a keynote speaker will present CROSSFIT results and lessons learnt, and an oriented discussion will follow guided by the moderator with the objective to actively contribute the engagement of participant parties, seeking for expansion of findings and replication possibilities. CROSSFIT will foster an environment where everyone feels comfortable contributing to the discussion, encouraging active participation and ensure that all voices are heard.

Drafting the thematic roundtables concepts: co-creation between the consortium partner country representative (ENER (ES), and SCN (EL) RdA (PT)) and pilots to determine specific sub-areas according to the most relevant data and information in the particular thematic areas. After co-creation and consultation of the remaining consortium partners, the roundtable draft concepts will be validated together with the Advisory Board.

T.7.5 Expansion and engagement of Greek findings via round tables for Greek regional governments (M16-M30), Lead: SCN, Participants:

This task is dedicated to supporting the WP6 in the replication and exploitation of CROSSFIT outcomes from the greek pilot approach. Two round tables will take place, one during the Pilot implementation and one at the end of the Pilot phase. The first round table will be held in one the pilot sites with the participation of local stakeholders in order to provide key insights for the development of one-stop-shop in these areas and the expansion of unique Pilot findings. The second round table will involve local and national stakeholders from other municipalities, interested to develop a one-stop-stop in their region, and will address the evaluation of the solutions as well as replication possibilities.


T.7.6 Expansion and engagement of Portuguese findings via round tables for Portuguese local authorities (M16-M30), Lead: RdA, Participants:

Similar to T 7.4 but in Portugal. The first roundtable will be held in AMP region as to focus a larger number of municipalities from the pilots. The nationwide event will predictably be held in Almada, as the city is located more in the centre of the country, expectably enabling to reach a higher audience.

STAFF EFFORT

Staff effort per participant								
Grant Preparation (Work packages - Effort screen) — Enter the info.								
Participant	WP1	WP2	WP3	WP4	WP5	WP6	WP7	Total Person-Months
1 - JAE	7.00	2.00	1.90	1.00	1.50	2.00	1.00	16.40
1.1 - JAEG	6.00		3.50		1.00	1.00	1.00	12.50
2 - ESC	3.00	4.00	9.00	8.50	2.00	3.00	2.00	31.50
3 - VEB	2.50	6.50	3.50	5.00	1.00	1.00	1.00	20.50
4 - SEFA	3.50	1.00	4.00		1.00	5.00	5.00	19.50
5 - RDA	2.50	3.00	1.00	10.50	7.50	6.00	5.00	35.50
6 - SCN	2.50	3.00	1.00	11.00	8.50	4.00	3.00	33.00
7 - ENER	2.50	3.00	1.00	10.00	7.00	4.00	3.00	30.50
Total Person-Months	29.50	22.50	24.90	46.00	29.50	26.00	21.00	199.40

LIST OF DELIVERABLES

Deliverables <i>Grant Preparation (Deliverables screen) — Enter the info.</i> <i>The labels used mean:</i> <i>Public — fully open ( automatically posted online)</i> <i>Sensitive — limited under the conditions of the Grant Agreement</i> <i>EU classified —RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444</i>						
Deliverable No	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month)
D1.1	Project Manual	WP1	1 - JAE	R — Document, report	SEN - Sensitive	3
D1.2	Project Website	WP1	1 - JAE	DEC — Websites, patent filings, videos, etc	PU - Public	6
D1.3	Progress Report	WP1	1 - JAE	R — Document, report	SEN - Sensitive	9
D1.4	Preliminary KPI report	WP1	1 - JAE	R — Document, report	SEN - Sensitive	9
D1.5	Final KPI report	WP1	1 - JAE	R — Document, report	SEN - Sensitive	30
D2.1	Catalogue on data collection methodologies	WP2	3 - VEB	DEM — Demonstrator, pilot, prototype	SEN - Sensitive	2
D2.2	Bundling of the workshop reports	WP2	3 - VEB	R — Document, report	SEN - Sensitive	8
D2.3	Gap analysis per pilot	WP2	2 - ESC	R — Document, report	SEN - Sensitive	9
D2.4	OSS roadmap per pilot: identification of the key success factors and pitfalls related to the energy-related one-stop-shop-service	WP2	3 - VEB	R — Document, report	SEN - Sensitive	12
D2.5	Analysis of the legal framework for OSS in the piloting Member states	WP2	2 - ESC	R — Document, report	SEN - Sensitive	14
D2.6	Blueprint guide ‘One-Stop-Shop’ for Energy Efficiency in the public sector	WP2	3 - VEB	R — Document, report	PU - Public	30

Deliverables

Grant Preparation (Deliverables screen) — Enter the info.

The labels used mean:

Public — fully open (🚩 automatically posted online)

Sensitive — limited under the conditions of the Grant Agreement

EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision [2015/444](#)

Deliverable No	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month)
D3.1	Assessment of the state of the art of current funding and financing opportunities in the clean energy transition in the public sector	WP3	2 - ESC	R — Document, report	PU - Public	9
D3.2	Funding mechanisms catalogue	WP3	4 - SEFA	R — Document, report	PU - Public	15
D3.3	Financing engineering- development of innovative private driven financing mechanisms	WP3	2 - ESC	R — Document, report	SEN - Sensitive	18
D4.1	Shortlisted Projects for tenders in Spain, Greece and Portugal	WP4	2 - ESC	DATA — data sets, microdata, etc	SEN - Sensitive	12
D4.2	Award criteria and process guideline	WP4	2 - ESC	R — Document, report	PU - Public	12
D4.3	Implementation strategy and pilot execution in Spain	WP4	7 - ENER	DEM — Demonstrator, pilot, prototype	SEN - Sensitive	16
D4.4	Implementation strategy and pilot execution in Greece	WP4	6 - SCN	R — Document, report	SEN - Sensitive	16
D4.5	Implementation strategy and pilot execution in Portugal	WP4	5 - RDA	R — Document, report	SEN - Sensitive	16
D5.1	Lessons Learnt for the Spanish Pilot	WP5	7 - ENER	R — Document, report	SEN - Sensitive	30
D5.2	Spanish Activity Report	WP5	7 - ENER	R — Document, report	PU - Public	30
D5.3	Lessons Learnt for the Greek Pilot	WP5	6 - SCN	R — Document, report	SEN - Sensitive	30

Deliverables

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Deliverable No	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month)
D5.4	Greek Activity Report	WP5	6 - SCN	R — Document, report	PU - Public	30
D5.5	Lessons Learnt for the Portuguese Pilot	WP5	5 - RDA	R — Document, report	SEN - Sensitive	30
D5.6	Portuguese Activity Report	WP5	5 - RDA	R — Document, report	PU - Public	30
D6.1	Dissemination, replication and exploitation plan	WP6	4 - SEFA	R — Document, report	SEN - Sensitive	9
D6.2	Final report on dissemination activities	WP6	5 - RDA	R — Document, report	PU - Public	30
D6.3	Post-project exploitation plan for Spain	WP6	7 - ENER	R — Document, report	SEN - Sensitive	30
D6.4	Post-project exploitation plan for Greece	WP6	6 - SCN	R — Document, report	SEN - Sensitive	30
D6.5	Post-project exploitation plan for Portugal	WP6	5 - RDA	R — Document, report	SEN - Sensitive	30
D6.6	Report on the finalisation of CROSSFIT collateral and replication strategy	WP6	4 - SEFA	R — Document, report	SEN - Sensitive	30
D6.7	Final Publishable Report	WP6	4 - SEFA	R — Document, report	PU - Public	28
D7.1	Communication and outreach plan and Visual identity	WP7	5 - RDA	R — Document, report	SEN - Sensitive	6
D7.2	Stakeholder mapping	WP7	5 - RDA	R — Document, report	SEN - Sensitive	6
D7.3	Capacity building programme plan and materials	WP7	4 - SEFA	R — Document, report	PU - Public	18
D7.4	Round tables Reports- Spain	WP7	7 - ENER	R — Document, report	PU - Public	20

Deliverables <i>Grant Preparation (Deliverables screen) — Enter the info.</i> <i>The labels used mean:</i> <i>Public — fully open ( automatically posted online)</i> <i>Sensitive — limited under the conditions of the Grant Agreement</i> <i>EU classified —RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444</i>						
Deliverable No	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month)
D7.5	Round tables Reports - Greece	WP7	6 - SCN	R — Document, report	PU - Public	20
D7.6	Round tables Reports - Portugal	WP7	5 - RDA	R — Document, report	PU - Public	20

Deliverable D1.1 – Project Manual

Deliverable Number	D1.1	Lead Beneficiary	1 - JAE
Deliverable Name	Project Manual		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	3	Work Package No	WP1

Description			
Summary of the key provisions in the Grant Agreement and the Consortium Agreement, along with the project's organizational structures, decision-making, roles and responsibilities and a quality assurance handbook, including data access policy and guidelines and the project's standard operating procedures. The report will be in PDF format, in English, approx. 20-30 pp.			

Deliverable D1.2 – Project Website

Deliverable Number	D1.2	Lead Beneficiary	1 - JAE
Deliverable Name	Project Website		
Type	DEC — Websites, patent filings, videos, etc	Dissemination Level	PU - Public
Due Date (month)	6	Work Package No	WP1

Description			
Continuously updated website to inform the general public about the project, providing the repository for public Deliverables. As part of this Deliverable, all partners will create a separate webpage on their respective websites referring to crOSSfit. The Deliverable will be a project website, in English.			

Deliverable D1.3 – Progress Report

Deliverable Number	D1.3	Lead Beneficiary	1 - JAE
Deliverable Name	Progress Report		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	9	Work Package No	WP1

Description			
The progress report will contain the documentation of the progress of work and the use of resources up to the due date. The report will be in PDF format, in English, approx. 15-20 pp.			

Deliverable D1.4 – Preliminary KPI report

Deliverable Number	D1.4	Lead Beneficiary	1 - JAE
Deliverable Name	Preliminary KPI report		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	9	Work Package No	WP1

Description
KPI report including explanations and breakdown of impacts by location and economic sector. In line with the KPI-report, KPI data will be reported in the LIFE KPI webtool. The report will be in PDF format, in English, approx. 10-15 pp.

Deliverable D1.5 – Final KPI report

Deliverable Number	D1.5	Lead Beneficiary	1 - JAE
Deliverable Name	Final KPI report		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP1

Description
This report will contain the full evaluation of all 11 KPIs and 9 quantified impacts, detailed calculation methodologies and undated references, where necessary. In line with the KPI-report, KPI data will be reported in the LIFE KPI webtool. The report will be in PDF format, in English, approx. 15-20 pp.

Deliverable D2.1 – Catalogue on data collection methodologies

Deliverable Number	D2.1	Lead Beneficiary	3 - VEB
Deliverable Name	Catalogue on data collection methodologies		
Type	DEM — Demonstrator, pilot, prototype	Dissemination Level	SEN - Sensitive
Due Date (month)	2	Work Package No	WP2

Description
A report containing detailed explanations on data collection methodologies (e.g. energy cadasters, quick scans, audits, dashboards, prices/financial indicators, technical inventories...). Will include example data sets too. PDF written in English.

Deliverable D2.2 – Bundling of the workshop reports

Deliverable Number	D2.2	Lead Beneficiary	3 - VEB
Deliverable Name	Bundling of the workshop reports		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	8	Work Package No	WP2

Description
Minutes on what has been discussed during the workshops with VEB and the pilot country. Report written in English. Approximately 5 pages per workshop. Can include examples of collected data.

Deliverable D2.3 – Gap analysis per pilot

Deliverable Number	D2.3	Lead Beneficiary	2 - ESC
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Deliverable Name	Gap analysis per pilot		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	9	Work Package No	WP2

Description
A powerpoint describing the gaps between the requirements for an OSS in energy-efficiency and the actual status. 3x app. 50 slides. In English.

Deliverable D2.4 – OSS roadmap per pilot: identification of the key success factors and pitfalls related to the energy-related one-stop-shop-service

Deliverable Number	D2.4	Lead Beneficiary	3 - VEB
Deliverable Name	OSS roadmap per pilot: identification of the key success factors and pitfalls related to the energy-related one-stop-shop-service		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	12	Work Package No	WP2

Description
A document set tailored to the maturity and current state of the art within each of the pilot organisations addressing a clear priority list on the gaps identified in D2.3 (containing a review of the satisfaction, a check on political support, stakeholder mapping, objectives and scopes, which services to deploy, possible business models...) – 3x app -25 pages, written in English and translated into the local language, PDF format.

Deliverable D2.5 – Analysis of the legal framework for OSS in the piloting Member states

Deliverable Number	D2.5	Lead Beneficiary	2 - ESC
Deliverable Name	Analysis of the legal framework for OSS in the piloting Member states		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	14	Work Package No	WP2

Description
Overview of the legal factors influencing the official establishment of a one-stop-shop in each of the pilot countries. Document of approximately 30-40 pages, PDF, written in English.

Deliverable D2.6 – Blueprint guide ‘One-Stop-Shop’ for Energy Efficiency in the public sector

Deliverable Number	D2.6	Lead Beneficiary	3 - VEB
Deliverable Name	Blueprint guide ‘One-Stop-Shop’ for Energy Efficiency in the public sector		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	30	Work Package No	WP2

Description
General lessons learned of the knowledge of transfer. Catalogue on what it takes to establish an OSS in Energy Efficiency.

Contains definitions, initial assessment, problem statements, case studies of the pilots, with a strong focus on the tendering procedures. Step-by-step resource, starting with a readiness assessment, it lays out the processes and key people needed to adapt, implement and monitor the OSS. PDF of app. 50 pages, written in English.

Deliverable D3.1 – Assessment of the state of the art of current funding and financing opportunities in the clean energy transition in the public sector

Deliverable Number	D3.1	Lead Beneficiary	2 - ESC
Deliverable Name	Assessment of the state of the art of current funding and financing opportunities in the clean energy transition in the public sector		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	9	Work Package No	WP3

Description

Identification of drivers/barriers of existing financing tools for project purpose. The report will be in PDF format, in English, approx. 15-20 pp

Deliverable D3.2 – Funding mechanisms catalogue

Deliverable Number	D3.2	Lead Beneficiary	4 - SEFA
Deliverable Name	Funding mechanisms catalogue		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	15	Work Package No	WP3

Description

Funding mechanism catalogue for project in the built environment is the public sector. The report will be in PDF format, in English, approx. 25-30 pp

Deliverable D3.3 – Financing engineering- development of innovative private driven financing mechanisms

Deliverable Number	D3.3	Lead Beneficiary	2 - ESC
Deliverable Name	Financing engineering- development of innovative private driven financing mechanisms		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	18	Work Package No	WP3

Description

Identification and development of financial structures adapted for financing public sector (municipalities, regions, and similar entities). The report will be in PDF format, in English, approx. 20-35 pp.

Deliverable D4.1 – Shortlisted Projects for tenders in Spain, Greece and Portugal

Deliverable Number	D4.1	Lead Beneficiary	2 - ESC
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Deliverable Name	Shortlisted Projects for tenders in Spain, Greece and Portugal		
Type	DATA — data sets, microdata, etc	Dissemination Level	SEN - Sensitive
Due Date (month)	12	Work Package No	WP4

Description
Data set containing a list and details with piloting projects selected for tenders. Dataset will be in English.

Deliverable D4.2 – Award criteria and process guideline

Deliverable Number	D4.2	Lead Beneficiary	2 - ESC
Deliverable Name	Award criteria and process guideline		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	12	Work Package No	WP4

Description
Clear award criteria and process guideline in the procurement process for EE funded solutions. The report will be in PDF format, in English, approx. 20-30 pp

Deliverable D4.3 – Implementation strategy and pilot execution in Spain

Deliverable Number	D4.3	Lead Beneficiary	7 - ENER
Deliverable Name	Implementation strategy and pilot execution in Spain		
Type	DEM — Demonstrator, pilot, prototype	Dissemination Level	SEN - Sensitive
Due Date (month)	16	Work Package No	WP4

Description
This deliverable consists of a blueprint, a comprehensive framework for facilitating the tendering procedures for selected pilots. The report will be in PDF format, in English and Spanish approx. 20-30 pp.

Deliverable D4.4 – Implementation strategy and pilot execution in Greece

Deliverable Number	D4.4	Lead Beneficiary	6 - SCN
Deliverable Name	Implementation strategy and pilot execution in Greece		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	16	Work Package No	WP4

Description
This deliverable consists of a blueprint, a comprehensive framework for facilitating the tendering procedures in Greece. The report will be in PDF format, in English and Greek approx. 20-30 pp.

Deliverable D4.5 – Implementation strategy and pilot execution in Portugal

Deliverable Number	D4.5	Lead Beneficiary	5 - RDA
Deliverable Name	Implementation strategy and pilot execution in Portugal		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	16	Work Package No	WP4

Description

This deliverable consists of a blueprint, a comprehensive framework for facilitating the tendering procedures in Portugal. The report will be in PDF format, in English and Portuguese approx. 20-30 pp.

Deliverable D5.1 – Lessons Learnt for the Spanish Pilot

Deliverable Number	D5.1	Lead Beneficiary	7 - ENER
Deliverable Name	Lessons Learnt for the Spanish Pilot		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP5

Description

D.5.1 will compile key insights, lessons learned, best practices, challenges faced, implemented solutions and recommendations derived from the Spanish pilot phase. The report will be in PDF format, in English approx. 20-35 pp.

Deliverable D5.2 – Spanish Activity Report

Deliverable Number	D5.2	Lead Beneficiary	7 - ENER
Deliverable Name	Spanish Activity Report		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	30	Work Package No	WP5

Description

D.5.2 will report the minutes of the capacity building activities to be conducted. The report will be in PDF format, in English and Spanish approx. 10-15 pp.

Deliverable D5.3 – Lessons Learnt for the Greek Pilot

Deliverable Number	D5.3	Lead Beneficiary	6 - SCN
Deliverable Name	Lessons Learnt for the Greek Pilot		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP5

Description

D.5.3 will compile key insights, lessons learned, best practices, challenges faced, implemented solutions and recommendations derived from the Greek pilot phase. The report will be in PDF format, in English approx. 20-35 pp.

Deliverable D5.4 – Greek Activity Report

Deliverable Number	D5.4	Lead Beneficiary	6 - SCN
Deliverable Name	Greek Activity Report		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	30	Work Package No	WP5

Description
D5.4 will focus on reporting the important issues raised during the capacity building activities. The report will be in PDF format, in English and Greek approx. 10-15 pp.

Deliverable D5.5 – Lessons Learnt for the Portuguese Pilot

Deliverable Number	D5.5	Lead Beneficiary	5 - RDA
Deliverable Name	Lessons Learnt for the Portuguese Pilot		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP5

Description
D5.5 will compile key insights, lessons learned, best practices, challenges faced, implemented solutions and recommendations derived from the Portuguese pilot phase. The report will be in PDF format, in English approx. 20-35 pp.

Deliverable D5.6 – Portuguese Activity Report

Deliverable Number	D5.6	Lead Beneficiary	5 - RDA
Deliverable Name	Portuguese Activity Report		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	30	Work Package No	WP5

Description
D5.6 will indicate the minutes of the capacity building activities that will be carried out. The report will be in PDF format, in English and Portuguese approx. 10-15 pp.

Deliverable D6.1 – Dissemination, replication and exploitation plan

Deliverable Number	D6.1	Lead Beneficiary	4 - SEFA
Deliverable Name	Dissemination, replication and exploitation plan		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	9	Work Package No	WP6

Description
Output of D6.1 - a detailed dissemination, replication and exploitation plan including calendar of events and early-stage definitions of potential exploitation routes. The report will be in PDF format, in English, approx. 20-30 pp.

Deliverable D6.2 – Final report on dissemination activities

Deliverable Number	D6.2	Lead Beneficiary	5 - RDA
Deliverable Name	Final report on dissemination activities		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	30	Work Package No	WP6

Description
Output of T6.2 – this report will cover all the dissemination activities undertaken in crOSSfit. The report will be in PDF format, in English, approx. 30-40 pp.

Deliverable D6.3 – Post-project exploitation plan for Spain

Deliverable Number	D6.3	Lead Beneficiary	7 - ENER
Deliverable Name	Post-project exploitation plan for Spain		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP6

Description
Output of T6.3 – this report will cover the exploitation strategies for the Spanish OSS model. The report will be in PDF format, in English, approx. 30-40 pp.

Deliverable D6.4 – Post-project exploitation plan for Greece

Deliverable Number	D6.4	Lead Beneficiary	6 - SCN
Deliverable Name	Post-project exploitation plan for Greece		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP6

Description
Output of T6.4 – this report will cover the exploitation strategies for the Greek OSS model. The report will be in PDF format, in English, approx. 30-40 pp.

Deliverable D6.5 – Post-project exploitation plan for Portugal

Deliverable Number	D6.5	Lead Beneficiary	5 - RDA
Deliverable Name	Post-project exploitation plan for Portugal		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP6

Description
Output of T6.5 – this report will cover the exploitation strategies for the Portuguese OSS model. The report will be in PDF format, in English, approx. 30-40 pp.

Deliverable D6.6 – Report on the finalisation of CROSSFIT collateral and replication strategy

Deliverable Number	D6.6	Lead Beneficiary	4 - SEFA
Deliverable Name	Report on the finalisation of CROSSFIT collateral and replication strategy		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	30	Work Package No	WP6

Description
Output of T6.6 – this report will cover the integration of CROSSFIT collateral into the SEFA platform and explain the post-project replication strategy. The report will be in PDF format, in English, approx. 20-30 pp.

Deliverable D6.7 – Final Publishable Report

Deliverable Number	D6.7	Lead Beneficiary	4 - SEFA
Deliverable Name	Final Publishable Report		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	28	Work Package No	WP6

Description
Output of T6.6 – this report will present the key results, main lessons learnt, and recommendations for the future. The final publication will be professionally designed, attractive and tailored to the target group. The report will be in PDF format, in English, approx. 30-40 pp.

Deliverable D7.1 – Communication and outreach plan and Visual identity

Deliverable Number	D7.1	Lead Beneficiary	5 - RDA
Deliverable Name	Communication and outreach plan and Visual identity		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	6	Work Package No	WP7

Description
Plan for the communication and outreach activities throughout the project, including summary of the communication materials developed. In a PDF file and in English, approximatively 20-30 pages.

Deliverable D7.2 – Stakeholder mapping

Deliverable Number	D7.2	Lead Beneficiary	5 - RDA
Deliverable Name	Stakeholder mapping		
Type	R — Document, report	Dissemination Level	SEN - Sensitive
Due Date (month)	6	Work Package No	WP7

Description
Report on the characterisation of the identified stakeholders. In a PDF file and in English, approximatively 10-15 pages.

Deliverable D7.3 – Capacity building programme plan and materials

Deliverable Number	D7.3	Lead Beneficiary	4 - SEFA
Deliverable Name	Capacity building programme plan and materials		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	18	Work Package No	WP7

Description
Report on the capacity building activities plan and a compilation of the materials developed for each action (presentations, etc.). In a PDF file in the four used languages (English, Spanish, Greek and Portuguese), approximatively 20-25 pages.

Deliverable D7.4 – Round tables Reports- Spain

Deliverable Number	D7.4	Lead Beneficiary	7 - ENER
Deliverable Name	Round tables Reports- Spain		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	20	Work Package No	WP7

Description
Compilation of the agendas, background agendas and proceedings for all Spanish roundtables. In a PDF file and in English, approximatively 20-3 pages.

Deliverable D7.5 – Round tables Reports - Greece

Deliverable Number	D7.5	Lead Beneficiary	6 - SCN
Deliverable Name	Round tables Reports - Greece		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	20	Work Package No	WP7

Description
Compilation of the agendas, background agendas and proceedings for all Greek roundtables. In a PDF file, in English approximatively 20-30 pages.

Deliverable D7.6 – Round tables Reports - Portugal

Deliverable Number	D7.6	Lead Beneficiary	5 - RDA
Deliverable Name	Round tables Reports - Portugal		
Type	R — Document, report	Dissemination Level	PU - Public
Due Date (month)	20	Work Package No	WP7

Description
Compilation of the agendas, background agendas and proceedings for all Portuguese roundtables. In a PDF file and in English, approximatively 20-30 pages.

LIST OF MILESTONES

Milestones					
Grant Preparation (Milestones screen) — Enter the info.					
Milestone No	Milestone Name	Work Package No	Lead Beneficiary	Means of Verification	Due Date (month)
1	Kick-off workshop held in each pilot Member state	WP2	2 - ESC	Travel receipts, signed participation registry of all the participants involved in the respective workshops.	3
2	Draft blueprint guide	WP2	3 - VEB	An uploaded first draft in the consortium repository	16
3	Funding mechanism catalogue	WP3	4 - SEFA	D3.2 submitted	15
4	Financing engineering- innovative private driven financing mechanisms development	WP3	2 - ESC	D3.3 submitted	18
5	List of shortlisted project deployment in piloting countries	WP1	2 - ESC	D4.1 Submitted	12
6	Implementing the tenders in the piloting countries	WP1	7 - ENER	D4.3, D4.4 and D.4.5 submitted	16
7	Monitoring results and lessons learnt	WP1	6 - SCN	Submission of D5.2, D5.4 and D5.6 an D2.6 with lessons learned integrated for T5.5	30
8	Spanish OSS starts operational activities	WP6	7 - ENER	Official communication to targeted local authorities	15
9	Greek OSS starts operational activities	WP6	6 - SCN	Official communication to targeted local authorities	15
10	Portuguese OSS starts operational activities	WP6	5 - RDA	Official communication to targeted local authorities	15
11	Integration of crOSSfit collateral into the SEFA platform	WP6	4 - SEFA	D6.4	30

Milestones					
<i>Grant Preparation (Milestones screen) — Enter the info.</i>					
Milestone No	Milestone Name	Work Package No	Lead Beneficiary	Means of Verification	Due Date (month)
12	Capacity building programme plan and materials	WP7	4 - SEFA	Deliver D7.3	18
13	First round table	WP7	5 - RDA	Event agenda, list of attendees, photo report	24

LIST OF CRITICAL RISKS

Critical risks & risk management strategy			
<i>Grant Preparation (Critical Risks screen) — Enter the info.</i>			
Risk number	Description	Work Package No(s)	Proposed Mitigation Measures
1	R1 Scope creep: the scope of the project is ambitious within the estimated time and budget. There are components that could be interpreted as open-ended, so the scope could expand beyond that which was originally intended	WP7, WP6, WP4, WP2, WP3, WP5, WP1	JAE and WP leads will continuously monitor and track progress towards deliverables against the available time and budget. Any deviations from the original scope will be managed through the crOSSfit Steering Committee.
2	R2 Limited stakeholder engagement: elements of this project require close engagement from, and support from key stakeholders across a range of countries. Should engagement not be widespread or deep enough, project delivery could be at risk.	WP7, WP6, WP4, WP2, WP3, WP5, WP1	Many letters of support/commitment have been received from interested stakeholders. Outreach activities targeting stakeholders will commence and be intensified during the early stages of the project. Any concerns about a lack of stakeholder engagement will be raised and addressed during crOSSfit Steering Committee meetings.
3	R3 Regulatory risk	WP4	Develop a contingency plan that outline specific actions to take in response to changes in regulations. Quick action will be taken by the consortium and different piloting scenarios will be explored e.g. sandbox.

Critical risks & risk management strategy <i>Grant Preparation (Critical Risks screen) — Enter the info.</i>			
Risk number	Description	Work Package No(s)	Proposed Mitigation Measures
4	R4 Timing of the project	WP7, WP6, WP4, WP2, WP3, WP5, WP1	The established processes and well-defined milestones will help to continuously monitor the project's progress and take early corrective actions.
5	R5 Insufficient budget for specified tasks: at the overall project level, or within WPs, it is discovered that insufficient budget has been provided to complete stated objectives	WP7, WP6, WP4, WP2, WP3, WP5, WP1	Thorough planning of personnel and material resources required to undertake the tasks outlined in this proposal has been undertaken by consortium partners and WP leaders. Ongoing monitoring of the budget allocated for each WP will be undertaken by WP leaders and disagreements will be resolved by the crOSSfit Steering Committee.
6	R6 Constraints to delivery due to COVID situation	WP7, WP6, WP4, WP2, WP3, WP5, WP1	If required consortium partners will continue to work digitally (due to COVID). Stakeholder engagement and dissemination activities will be designed to ensure maximum interaction, regardless of in-person or digital meeting status.
7	R7 Overlap-related delays or quality issues in WPs: where dependencies between WPs can cause delays or impact the quality of deliverables in interconnected WPs.	WP7, WP6, WP4, WP2, WP3, WP5, WP1	This risk will be continuously monitored through the regular meeting of the crOSSfit Steering Committee and through the oversight of JAE as project coordinator.
8	R8 Data collection slower than anticipated in the Work Plan, which would affect the timely implementation of pilots.	WP4	Regular monitoring of the progress within WP2 and early interventions to support Partners in overcoming their temporary problems. In the unlikely event of conditions affecting the delivery of the data timely, the Project Coordinator will seek the advice of the Project Officer.
9	R9 Insufficient availability of human resources can lead to possible delays in delivery of the results with WPs affected by the said conditions	WP7, WP6, WP4, WP2, WP3, WP5, WP1	Active HR and recruitment actions aimed at attracting competent profiles and in-house assignments according to the needs. Regular monitoring, coordination and reporting on any staff changes to the coordinator (WP1).
10	R10 Risk of low local authorities' engagement	WP4	The project has received letters of support from 13 local and regional public authorities, of which 6 in Greece, 3 in Portugal and 2 in Spain. Great effort will be put into the engagement activities towards public authorities, specifically in WP7. Beyond the ones that already have shown interest, further public authorities will be reached through each partners' networks in the respective countries.
11	R11 Staff shortage to employ in OSS, specifically in Greece	WP6	A possible solution to this problem would be to establish an OSS in the area where the pilot will be implemented but to have the possibility to employ "hybrid" people as well.

TECHNICAL DESCRIPTION (PART B)

PROJECT	
Project name:	Continental Replicable One Stop Shop for Financial Innovation Trajectories
Project acronym:	CROSSFIT
Coordinator contact:	Michael Pachlatko. Joule Assets Europe

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HISTORY OF CHANGES

Nr.	Date	Change	Where
1	22/04/2024	CINEA requested change: Adjusted language in T1.7	3.2 T1.7
2	22/04/2024	CINEA requested change: Amended T6.6 to include language on the final publishable report. Inserted D6.7 "Final Publishable Report"	3.2 WP6
3	22/04/2024	Consortium requested change: Changed status of Deliverable D4.3 from Public to Sensitive	3.2 WP1
4	22/04/2024	Consortium requested change: Changed status of Deliverable D4.4 from Public to Sensitive	3.2 WP2
5	22/04/2024	Consortium requested change: Changed status of Deliverable D4.5 from Public to Sensitive	3.2 WP4
6	22/04/2024	Consortium requested change: Changed status of Deliverable D5.1 from Public to Sensitive	3.2 WP6
7	22/04/2024	Consortium requested change: Changed status of Deliverable D5.3 from Public to Sensitive	3.2 WP6
8	22/04/2024	Consortium requested change: Changed status of Deliverable D5.5 from Public to Sensitive	3.2 WP6
9	22/04/2024	CINEA requested change: Split (old) T6.3 into 3 separate tasks T6.3, T6.4, T6.5 – one for each pilot. Included 3 separate Deliverables D6.3, D6.4 and D6.5 for each pilot.	3.2 WP6
10	22/04/2024	CINEA requested change: Inserted (new) Deliverable D1.3 as a preliminary KPI report in month 9.	3.2 WP1
11	22/04/2024	CINEA requested change: Provided further explanation on setup and geographical remit of OSS structures for all 3 pilots	1.4
12	22/04/2024	CINEA requested change: Specified the inclusion of energy efficiency services in the Spanish OSS offering.	1.4
13	22/04/2024	CINEA requested change: Specified the inclusion of the entire island of Halki in the 2nd Greek pilot.	1.4
14	22/04/2024	CINEA requested change: Provided further explanation on the involvement of Public Authorities and the enhancement of public procurement processes in the different pilots.	1.4
15	22/04/2024	CINEA requested change: Added 2 more risks to the Risk Management section.	4.5
16	19/06/2024	CINEA requested change: Deleted (former) MS9 and included 3 separate MS (9-11) for the start of operational activities for the pilots in M15	3.2 WP6
17	19/06/2024	CINEA requested change: Moved all subcontracting costs to "other direct costs" in the budget table	Budget (Annex 2)
18	19/06/2024	CINEA requested change: Increased PM effort for partners RDA, SCN and ENER in WPs 3 & 6, by shifting PMs from other partners and WPs. Shifted 1PM for partner SEFA from WP3 to WP2.	Budget (Annex 2)
19	19/06/2024	CINEA requested change: Added further detail to task description T2.4	3.2 WP2

1. RELEVANCE

1.1 Background and general project objectives

CROSSFIT's overarching objective is to transform market dynamics by introducing a game-changing approach in achieving public building decarbonization: with the set-up of one-stop shops in the public sector, where complexities in procurement are simplified, and opportunities are seized. Our primary goal is to streamline decision-making, centralize tender procedures at the municipal, regional, and national levels, and attract and actively engage the private financial community.

The energy transition stands as a formidable global challenge, with the European Union or EU confronting its own set of distinctive hurdles. National, regional governments, and municipalities within the EU grapple with additional complexities in their energy transition journey, including adherence to public tendering regulations, Eurostat compliance, limited expertise in financial models, inadequate human resources, and insufficient data in the built environment (benchmarks, efficiency, accurate metering).

Buildings in the EU are responsible for 40% of the energy consumption and contributing to 36% of energy-related greenhouse gas emissions. To meet the EU's 55% emission reduction target by 2030, buildings must reduce their emissions by 60%. Achieving this will necessitate an annual investment estimated at €1 trillion, an increase of €356 billion compared to the 2010-2020 period (source EIB 2022- Investment Report 2022/2023: Resilience and renewal in Europe).

The public sector must take a leading role in the deep renovation and net zero journey as public entities emerge as significant players in the real estate ownership landscape. In total, the EU boasts approximately 131 million buildings out of which approximately 119 million are residential buildings (<https://www.rics.org/news-insights/energy-efficiency-of-the-building-stock-in-the-eu>). Around 20% fall under public ownership according to data analysis across 23 countries with Austria being the exception, reporting considerably more than 20% of residential dwellings held publicly (source: BPIE).

Challenges of the energy sector:

The European energy sector is a complex and rapidly changing landscape facing significant challenges that impact the entire spectrum of stakeholders, including the public institutions responsible for the energy supply and its management in the public buildings. These challenges comprise: digitalization and tight climate regulations. We see the overarching shift in the transition from a centralized system with passive users to a decentralized whole in which active customers (so-called "prosumers") are present. Customers become active when they have some of their own production (e.g. solar panels) and thus consciously play a role in the system. There is lack of systematic, holistic approach in facing these challenges in the public sector domain, which is still driven by rather reactive and project related approach, which happens to be insufficient in coping with the new developments and trends in the energy field. In particular energy prices and energy poverty are prominent issues for both suppliers and customers. To this end, the important points of attention are large failures in energy savings and energy transition towards decarbonization of the sector.

Mission of the One-Stop-Shop approach: to assist the public sector (education, healthcare, social housing...) in its mission towards the climate neutrality. By means we well defined activities, OSS model will unburden the public sector towards the more sustainable and efficient energy supply and management. It will play the central role in collecting, analyzing and reporting information and quantifiable data related to integrated energy management. It will direct and stimulate innovation in energy technologies.

Specific Objective: To remove market barriers towards improved conditions towards integrated building renovation services in public sector.

These barriers comprise:

1. Market barriers/constraints or needs of market actors:

- **Lack of budget** at the level of public entities to reach a nearly zero energy building stock
- **Lack of knowledge** of finding adequate financing solutions to cover renovation needs
- There is **no clear overview of the total number of buildings** belonging to the public sector. Data and information about the patrimony is often not complete nor up to date.
- **Lack of monitoring** on clear performance indicators, insights on occupation and user intensity are often not available
- Organizations in the public sector often **lack the knowledge, expertise and resources** to make their patrimony more sustainable.
- **A lot of plans** with regional scope (e.g. on heating, energy production, mobility...), which have an impact on the road towards a sustainable building stock are **not integrated with specific building data** and hence require a lot of effort to combine for each investment project

2. Other important barriers possibly influencing the expected impacts:

- Lack of capacity in the building sector. A higher sense of urgency will be needed to accelerate the renovation rate. This

barrier will also be considered in work package 5.

- Lack of incentives for the building sector to scale up innovative renovation concepts.
- Regulatory constraints. Public entities can be limited in the financing solutions to opt for, since their flexibility might be impeded by financial regulations.

European policy context

As per the European Commission (EC), the impact assessment on the revision of the energy efficiency directive reveals a notable disparity in public procurement for central government bodies, ranging from 5% to 86% among EU member states. Despite this variation, public procurement collectively constitutes approximately 14% of the EU's GDP, signifying a substantial economic influence. In this context, the significance of public buildings becomes exemplary, as they evolve into inspirational hubs and public organizations emerge as pioneers in driving the energy transition.

Furthermore, thanks to the revision of the European directive on Energy Efficiency in 2023 (EED), local authorities have been assigned a leading role, starting with a commitment to renovate 3% of the total surface area of public buildings each year, with a view to transforming them into zero-emission buildings by 2040. To this end, the revised Energy Performance of Buildings Directive (EPBD) will call for buildings used by the public sector to achieve a mandatory Class D status by 2030. Although this obligation is still under negotiation, public buildings will be the first to participate in the renovation wave and will be the most ambitious contributors to the EPBD's targets, prior to the rest of the national building stock.

The ambitions of the European directives also call on public authorities to reduce their energy consumption by 1.9% per year. These obligations represent a necessary stream of new investments to be undertaken by municipalities and will put the financial and execution capabilities of local authorities to the test. Although this obligation does not concern municipalities with fewer than 50,000 residents until December 31, 2026, and those with fewer than 5,000 residents until 2029) As such, and keeping the timelines for conceptualizing, tendering, awarding contracting and finally implementing in mind it is mandatory to equip these municipalities with expertise and mechanisms to implement the directives within the required timelines, which is a race against the clock.

The above clearly demonstrates the new responsibilities placed on the shoulders of municipalities, and the EED's drive to align public procurement strategies.

This is well illustrated by the provisions of art. 7 of the EED, which stresses the need to assess the potential for energy savings when concluding long-term energy-related contracts. In addition, calls for tender must indicate the global warming potential of new buildings. At the same time, member states are required to support local authorities by providing harmonized methodologies for public procurement and setting up skills support centres to foster aggregated procurement and the digitalisation of procedures.

As can be seen from the above, national authorities must step up their efforts when it comes to tendering which then will raise the issue of funding for these projects.

In the realm of public tenders for energy efficiency and the renovation wave, notable barriers hinder progress. Public authorities face limitations in resources and expertise, impacting areas like quality checks, technical know-how, and financial structuring. By dismantling these barriers and providing tools, crOSSfit contributes remedies to the rising demand for effective energy transition solutions.

Despite heightened climate targets by 2050, municipalities grapple with ongoing challenges in tendering. The often-tried strategy of outsourcing projects to external consultants for drafting tenders, is no solution for tendering funded solutions as such consultants lack the financial dimension in considering investor's needs. Complexities in private financing options compound the situation, sometimes leaving municipalities uninformed about alternatives and funding opportunities.

The current central organizational context inhibits communication with external stakeholders, highlighting the need for an independent structure to manage tenders comprehensively. Setting up specialized entities dedicated to managing complex tenders further allows municipalities to focus on their resident facing day-to-day administrative obligations.

Recognizing the inadequacy and limitations of relying solely on public funds, involving the private financing sector becomes imperative. Diverse approaches to tendering funded solutions are essential for securing funding beyond local budgets, aligning with the declared EU objectives to attract private investment into energy efficiency and deep renovation projects. (as seen in the "Renovation Wave" initiative of the European Green Deal and the REPowerEU Plan).

Replicating the Vlaams Energiebedrijf Model: Advancing Energy Efficiency Initiatives

The challenges facing the Municipal sector have been rightly recognized by the region of Flanders in Belgium, which set up an external independent agency Vlaams Energiebedrijf, hereafter VEB, that caters to the public sector (a.o: municipalities) in the region of Flanders. In 2012 VEB was set up as a central purchasing body for the Flemish government. Gradually, this scope widened to cater today as purchasing body to the entire public sector comprising education, healthcare, social housing,

cities and municipalities. Since 2018, VEB also runs an energy efficiency and renewable energy generation department that over time became a one stop shop (OSS) offering facilitating services towards multiple energy transition technologies. The core focus of the OSS is on the development of framework agreements (i.e: photovoltaics, HVAC...).

These framework agreements alleviate the need for public organisations to write their own individual public tenders, unburdening the value chain both upwards (at the level of the contractors, project developers and architects) and downwards (towards the end customer). Other major advantages VEB can offer are their energy and building stock data base, named Terra (facilitating data analytics on energy consumption, the identification of potential energy saving measures and integration with other energy management software), the guidance with sustainable real estate management, and the offering of study trajectories preceding the implementation of energy related assets.

By having built up a knowledgeable staff covering the various technological, legal and financial aspects VEB has streamlined the complex tendering process and are able to pool similar procurement needs of various municipalities i.e. lighting into one public procurement tender with the benefit that by tendering the lighting procurement for 10 municipalities which individually would have a requirement of app. EUR 1,5 Mio. is now a EUR 10 Mio. requirement. This in turn attracts major market players, fostering competition, leading to better pricing, and larger funding opportunities for the financial sector in turn resolving the issue of low "ticket size" for financiers, making EUR 10 Mio. opportunities more appealing and competitive than EUR 1,5 Mio opportunities where the financiers can't engage.

The crOSSfit project aims to refine, amplify and replicate the successful VEB model, particularly focusing on the clean energy transition (energy efficiency, deep retrofit and renewable energy). This involves streamlining the tendering process, addressing knowledge gaps, and creating an investment opportunity pipeline to engage the private financial sector. (more details to be provided in 1.4)

By adapting the VEB OSS model within the limits of national laws of the pilot countries, crOSSfit aims to establish a standardized tendering process and templates, tested in WP4. The guidelines and templates will result from WP2, and WP3 and will focus on exploring and developing innovative financial schemes.

crOSSfit seeks to foster mutual understanding, enhance skills, and facilitate collaboration across the retrofit sector value chain, involving project developers, ESCOs (Energy Service Company) financiers, architects, and trade associations. WP2 will concentrate on inhouse capacity building with pilots and knowledge transfer with key public sector stakeholders, and WP5 is structured around capacity building and lessons learned post pilot implementation. Whilst WP3 and WP6 will actively involve financing stakeholders in exploring innovative financial models linked to VEB's project pipeline.

Strategic Piloting Approach

In order to facilitate the knowledge transfer from VEB to the piloting regions crOSSfit has devised a 2-tier piloting approach.

On the one hand the current VEB model will be replicated in the selected piloting regions, whilst the VEB model itself will be upgraded by expanding their financial engineering capabilities (WP3). Upon successful testing by VEB of innovative financial schemes developed in WP3, the results will be shared and incorporated into the 3 piloting countries, thus giving those access to the latest funding solutions.

The first tier of piloting will be focused on the region of Catalunya (Spain), Greece, and Portugal, counties in which specific partners and pipeline of projects have been already identified for piloting (WP4).

L'Energetica hereafter ENER, a Spanish public entity specializing in energy with a regional emphasis on Catalonia, aims to implement comprehensive services as part of the crOSSfit initiative. The organization will actively promote these services at the regional level. Simultaneously, partners in Portugal and Greece will contribute to the integration of these services and structures through collaboration with identified local actors (more details in 1.4). This collaborative effort will unfold through various activities: in WP4 via piloting, in WP5 through capacity building and lessons learned, and in WP7 during the roundtable discussions organized in each piloting country.

As mentioned above the second tier of piloting is led by VEB, which relies on the newly gained know-how and developed financial model in WP3. Project pipeline has been identified by VEB as detailed in the Impact section.

The project's insights and best practices are anticipated to enhance awareness and encourage the adoption of centralized procurement agencies across the EU (WP6 and WP7). This, in turn, should accelerate the deployment of energy-saving and renewable energy solutions in the EU's municipal, regional and national sector, contributing to the achievement of the 2030 and 2050 objective.

1.2 Specific project objectives

Objective 1. Streamline the tender process for clean energy transition via the replication and/or adaptation of VEB model

crOSSfit, by drawing on the expertise of VEB and replicating their model throughout the piloting countries aims to achieve substantial and enduring benefits for the public sector by facilitating the implementation of energy efficiency and deep renovation projects through an efficient tender process.

VEB was established with the purpose of enhancing sustainability and efficiency in the energy management, VEB operates as a 100% governmentally owned, externally privatized, and independent agency (EVA) under private law, functioning as a public limited liability company (NV). VEB acts as a purchasing centre for 100% green energy for organisations in the public sector and for energy efficiency services. Through drafting and issuing the public tender, paying the invoices, VEB also offers support in Energy supply contracting (ESCO).

By replicating the VEB model in the 3 piloting countries (Spain, Greece and Portugal) the public authorities can leverage VEB's expertise in these complex tendering matters, reaches scale by bundling similar measures into one tender to achieve better pricing. Based on solid technical know-how and legal contracts, followed up by quality checks it achieves administrative unburdening.

Such a tried and tested model can tackle any renewable energy and energy efficiency issue in the public space, whilst the government organisations can focus on their core task (healthcare, education, etc.). By reducing barriers for public authorities, a replication of the VEB model resolves to the issues resulting from growing demand for energy transition solutions and their implementation.

Through the streamlined replication of the VEB model in the piloting countries, crOSSfit is establishing enduring financial and technical capacity within public authorities. This is achieved through activities in WP2 and WP3, involving the creation of templates, guidelines, technical catalogue, and financial catalogue. Simultaneously, crOSSfit capitalizes on the proven success of the VEB model to offer relevant stakeholders in the piloting countries technical, financial, legal assistance, procurement services, quality assurance work, and capacity building, as provided in WP2, WP3, WP4, and WP5.

crOSSfit will:

- Engage and collaborate with key stakeholders in the 4 member states (piloting countries)
- Provide training in the one-stop-shop model, empowering public authorities to enhance their replication capabilities of the VEB model (in Spain, Greece and Portugal). Concurrently, offer capacity building in both technical and financial side in the streamlined tender process
- Create and deliver a technical tendering catalogue and a financial catalogue

Nr	Key Performance Indicator	Target
1.	Technical tendering catalogue (Guidelines and Templates) and financial catalogue	2 (translated in minimum 4 languages)
2.	Number of stakeholders who have been trained on the one-stop shop model	40
3.	Letters of commitment from public stakeholders (municipalities, cities, regions, public bodies etc)	13

Objective 2 – Financing engineering for energy transition

Leveraging on public funding to raise private investments is crucial for the success of the clean energy transition, as relying solely on public funding sources will not suffice given the magnitude of the funding needs. Establishing a financial strategy for the building stock owned by various public entity's is vital for a clear and easy pathway, that will not only maximizes financial benefits, but also stimulates additional energy efficiency (EE) investments. Public entities, constrained by both human and financial resources, often face delays in developing EE projects. In this context, crOSSfit aims to create a funding mechanics catalogue, offer capacity building to the main stakeholders, and collaborate with VEB to explore and develop innovative financing model/structure. This model will enable VEB to increase capital flows by blending private and public funding sources in their current EE projects and deep renovations pipeline, before engaging with the pilots to transfer the newly gained know-how.

Furthermore, WP3 will explore the convergence of Eurostat compliance (from an off-balance sheet perspective) and bulk tendering via aggregation for funded solutions, with the goal of securing additional financing through a restricted equity contribution.

CrOSSfit will bring these tools to all relevant stakeholders through its capacity building (mainly in WP2, WP7) and via lessons learned in WP5 and test them in real-life within the Piloting work package (WP4).

Nr	Key Performance Indicator	Target
4.	Letters of commitment from financial stakeholders (banks, private funds, crowdfunding platforms)	12
5.	Funding mechanisms catalogue	1
6.	Financial Institution Stakeholder engagement	20

Objective 3 – Scaling and replication

One of the CrOSSfit's main objective is to customize, expand, upgrade and replicate VEB's successful model (WP4) and (WP2 and WP3).

In the 4 piloting countries a total of 8 pilots have been shortlisted.

The crOSSfit project adopts a two-tiered piloting approach. Firstly, the existing VEB model will be replicated in the chosen pilot regions. Simultaneously, the VEB model will undergo enhancements, particularly in financial engineering capabilities (WP3). Once innovative financial schemes, tested successfully in WP3, are established, the outcomes will be shared and integrated into the three piloting countries.

Furthermore, VEB will ensure the expansion of their services in Belgium by incorporating the results from crOSSfit into their organization and pilot the newly developed models in WP4 (the innovative financial models developed in WP3). VEB will provide additional support to public authorities in Belgium (the Flemish region). This ensures that smaller public players benefit from a comprehensive support system in their clean energy transition. Through tailored assistance and expertise, VEB aims to facilitate and enhance the effectiveness of clean energy initiatives in Belgium, contributing to the overall success of the transition in the deep renovation sector.

In Portugal, RdA has two pilots identified. One in AdEPorto – Porto Energy Hub (Porto, the second-largest region in Portugal) and the Municipality of Almada. These initiatives will focus on exploring ESCO financing models and expanding the scope of establishing one-stop-shop structures in the clean energy transition.

In Greece SCN identified the following two pilot cases in OSS in Peloponnese region – Energy Efficiency of Municipal Buildings in five prefectures (Arcadia, Argolis, Corinthia, Laconia and Messenia) and Energy Communities in the Southern Aegean Sea.

In Spain 3 pilots have been identified by ENER, Spain's first public renewable energy supply company (representing the Catalan region), commenced operations in March 2023, serving as a trailblazer for sustainable energy practices nationwide. A newly established entity, ENER lacks the requisite experience and will directly benefit directly from the knowledge transfer facilitated by VEB in WP2. Additionally, ENER will focus on expanding its activities in energy efficiency and deep renovation space within the Catalan region once the capacity and knowhow will be built throughout crOSSfit.

The expansion and engagement of the findings in each of the piloting countries will be done in WP7 via round tables for different regional, municipal and local governments in each of the piloting country SEFA will disseminate the results and concepts developed at a pan-European level. WP5 will ensure that the know-how is being transferred in each piloting country by organizing Capacity building activities and lessons learned sessions.

Nr	Key Performance Indicator	Target
7.	Piloting tenders in 4 countries	8
8.	OSS firmly established for continued exploitation	3
9.	Multipliers beyond shortlisted pilots to new regions and countries (LOS)	4

Objective 4 – Long-term exploitation through SEFA

The Brussels based Sustainable Energy Finance Association Asbl (SEFA) is the European trade association for the sustainable energy industry. As non for-profit organisation SEFA is being best placed to undertake the long-term exploitation of the newly built collateral and knowledge.

SEFA presently hosts various digital tools, developed under earlier H2020 projects LAUNCH and PROPEL having for purpose the acceleration deal closure and private finance investments in the EE space and are integrated within a member access platform. These tools encompass an off-balance sheet Energy-as-a-Service contract (validated by a major audit firm to its off-balance sheet compliance), a risk assessment protocol, an ESG risk module, a Know-Your-Customer (KYC) module, and a standardized loan application guideline, along with sales and marketing materials for energy efficiency (EE) project developers. SEFA is committed to ensuring the sustained utilization of the knowledge, best practices, tools, and materials

generated during crOSSfit. It will further act as a multiplier through capacity-building initiatives within its network and in other multiplier regions (e.g. Hungary based on the LOS number received). As such SEFA will after the end of the crOSSfit project further promote the learnings from crOSSfit and educate Municipalities in setting up further one-stop-shops across the EU.

Nr	Key Performance Indicator	Target
10.	Integration of the new tools and guidelines on SEFA platform, in multiple languages	4
11.	Capacity Building and training programme outside of the project beneficiaries and piloting countries	1

1.3 Compliance with LIFE programme objectives and call topic

Clean Energy Transition Objective 1:

The crOSSfit project aims to enhance, expand, and replicate the successful VEB model, with a specific emphasis on the clean energy transition encompassing energy efficiency, deep retrofit, and renewable energy. This involves optimizing the tendering process, closing knowledge gaps, and establishing an investment pipeline to involve the private financial sector. The objective is to contribute to the EU's goals on sustainable renewable energy and increased energy efficiency, enriching the knowledge base and applying best practices.

By customizing the VEB OSS model to comply with the national laws of the pilot countries, crOSSfit aims to establish standardized tendering processes and templates, which will be tested in WP4. The development of guidelines and templates will be the outcome of WP2, while WP3 will focus on exploring and developing innovative financial schemes.

Anticipating that the project's insights and emphasis on best practices will enhance awareness, crOSSfit aims to encourage the adoption of centralized procurement agencies across the EU (WP6 and WP7). These concerted efforts should expedite the implementation of best-in-class energy-saving and renewable energy solutions in the EU's municipal, regional, and national sectors, significantly contributing to the achievement of the 2030 and 2050 objectives.

Clean Energy Transition Objective 2:

CrOSSfit aims to cultivate mutual understanding, elevate skills, and promote collaboration within the retrofit sector value chain, engaging stakeholders such as project developers, ESCOs, financiers, architects, and trade associations. WP2 focuses on capacity building and knowledge transfer specifically with key stakeholders in the public sector. Simultaneously, WP3 and WP6 involve financial stakeholders in the exploration of innovative financial models connected to VEB's project pipeline. At the same time the piloting partners alongside with SEFA will ensure the acceleration of capacity building for the public stakeholders in WP5 under Lessons learnt from the piloting phase in each of the piloting countries. SEFA will ensure the dissemination at a pan European level in WP7 by organising capacity building activities with relevant stakeholders.

Clean Energy Transition Objective 3:

The crOSSfit project adopts a two-tiered piloting approach.

Firstly, the existing VEB model will be replicated in the chosen pilot regions. The first tier of piloting will be focusing on the region of Catalunya (Spain), Greece, and Portugal, countries in which specific pipeline of projects have been already identified for piloting (WP4). Partners in Portugal and Greece will support the integration of these services and structures through dedicated local actors, with ENER promoting integrated services at the regional level (WP4).

Simultaneously, the VEB model will undergo enhancements, particularly in financial engineering capabilities (WP3). CrOSSfit will develop a funding mechanism catalogue (T3.4), offer capacity building for key stakeholders, and to partner with VEB to investigate innovative financing models (T3.4 and T3.5) for financing VEB's project pipeline (as detailed in the Impact section). Through the results of WP3, VEB will optimize capital flows by integrating private and public funding sources into their ongoing EE projects and deep renovations pipeline.

The second tier of pilots will be deployed by VEB relying on the enhancements and newly developed financial models. The insights gained post piloting will be shared with the other pilots, strengthening their capabilities.

The expansion and engagement of the findings in each of the piloting countries will be done in WP7 via round tables for different regional, municipal and local governments in each of the piloting country.

CrOSSfit looks to address most of the call topics with a focus on Scope C: Integrated services for clean energy transition in public buildings:

Proposals should establish and operate facilitation structures, for example one-stop-shops, offering all-inclusive

service offer from technical, financial to legal advice, procurement and quality assurance of works.

CrOSSfit dedicates entire work packages, specifically in WP2 and WP3, to crafting technical, financial, and legal support for public entities engaging in the clean energy transition procurement process.

The project's focal point involves customizing, enhancing, and replicating VEB's successful model in three EU member states: Spain, Greece, and Portugal (WP4), and improving VEB's capabilities on the financial engineering side within the dedicated WP3 and testing the newly developed models in WP4.

Furthermore, crOSSfit has a dedicated task in WP6 namely *T.6.3 Establishment of regional/national OSS offerings for post-project exploitation* that will ensure the establishment of regional/ national OSS.

Building on the success of the pilots in the piloting countries, the crOSSfit partners aspire to replicate VEB's model in additional regions across the countries SEFA will disseminate the results and concepts developed at a pan-European level.

Moreover, VEB will ensure the expansion of their services to the Flemish region by incorporating the results from crOSSfit into their organization. VEB will provide additional support to public authorities in the Flemish region, ensuring that smaller public players benefit from a comprehensive support system in their clean energy transition.

Financial engineering support to increase blending of public and private funding and uptake of EU funding sources

The project has a dedicated work package (WP3) that aims to provide support to the public authorities and design blended funding structures thus maximizing the municipalities financial resources and attracting private funding sources.

CrOSSfit will develop a funding mechanism catalogue (T3.4), offer capacity building for key stakeholders, and partner with VEB to investigate innovative financing models (T3.4 and T3.5) for financing VEB's project pipeline (as detailed in the Impact section). Through the results of WP3, VEB will optimize capital flows by integrating private and public funding sources into their ongoing EE projects and deep renovations pipeline. The insights gained will be shared with the pilots, strengthening their capabilities.

Create and sustain long-term financial and technical capacity amongst public authorities to develop projects

CrOSSfit's objective is to support public authorities in the piloting countries by creating and sustaining long-term financial and technical capacity for project development (WP2 and WP3). This will be achieved through capacity-building initiatives and the streamlined tender process for clean energy transition, leveraging the replication, diversification and/or adaptation of the VEB model in the piloting countries (WP2, WP5, WP7 and WP4).

SEFA will integrate the material developed in crOSSfit on its platform in *T.6.4 Consolidation of the crOSSfit collateral for further replication through SEFA*, ensuring continued promotion of the one-stop-shop model, as well as the technical and financial catalogue (that are outputs of WP2 and WP3). This continued promotion will be achieved through dissemination events and workshops aimed at engaging public sector stakeholders in further EU member states going forward.

Service offers (technical, financial to legal advice, procurement and quality assurance of works) should cover a large territory for the benefit of especially small and medium-sized municipalities or other public bodies.

The piloting phase is widespread through the 4 countries.

In Portugal, RdA is embarking on two pilots identified in AdEPorto – Porto Energy Hub (Porto, the second-largest region in Portugal) and the Municipality of Almada. These initiatives will delve into ESCO financing models and the establishment and of scope expansion of one-stop-shop structures in the clean energy transition.

In Greece SCN identified the following 2 pilot cases in OSS in Peloponnese region – Energy Efficiency of Municipal Buildings in five prefectures (Arcadia, Argolis, Corinthia, Laconia and Messenia) and Energy Communities in the Southern Aegean Sea.

In Spain, ENER the pioneering public renewable energy supply company, has identified three pilots for the Catalan region. Commencing operations in March 2023, ENER is at the forefront of sustainable energy practices nationwide. Catalunya, the second-largest region in Spain, will benefit directly via ENER from the knowledge transfer facilitated by VEB in WP2. As a newly established entity, ENER will focus on expanding its activities in energy efficiency and deep renovation space within Catalonia as it builds capacity and know-how throughout the crOSSfit project.

ENER aims to replicate its OSS model nationwide across the 17 Spanish regions and two autonomous cities. This expansion aims to foster widespread adoption of energy efficiency and renewable energy solutions, contributing to Spain's overall energy transition objectives.

VEB will disseminate the newly acquired knowledge within the Flemish region, ensuring the adoption of new skills and materials (more details provided in 1.4 and in the Impact section).

SEFA is committed to ensuring the enduring utilization of crOSSfit's results by integrating materials and tools into the SEFA platform and facilitating knowledge and best practices sharing. Beyond this, SEFA will play a pivotal role as a multiplier by engaging in capacity-building initiatives within its established network and other multiplier regions, such example Hungary (based on the number of LOS received). Following the conclusion of the crOSSfit project, SEFA will actively champion the

dissemination of learnings and educate municipalities on the establishment of additional one-stop-shops across the European Union.

Furthermore, the expansion and engagement of the findings in each of the piloting countries will be done in WP7 via round tables for different regional, municipal and local governments in each of the piloting country.

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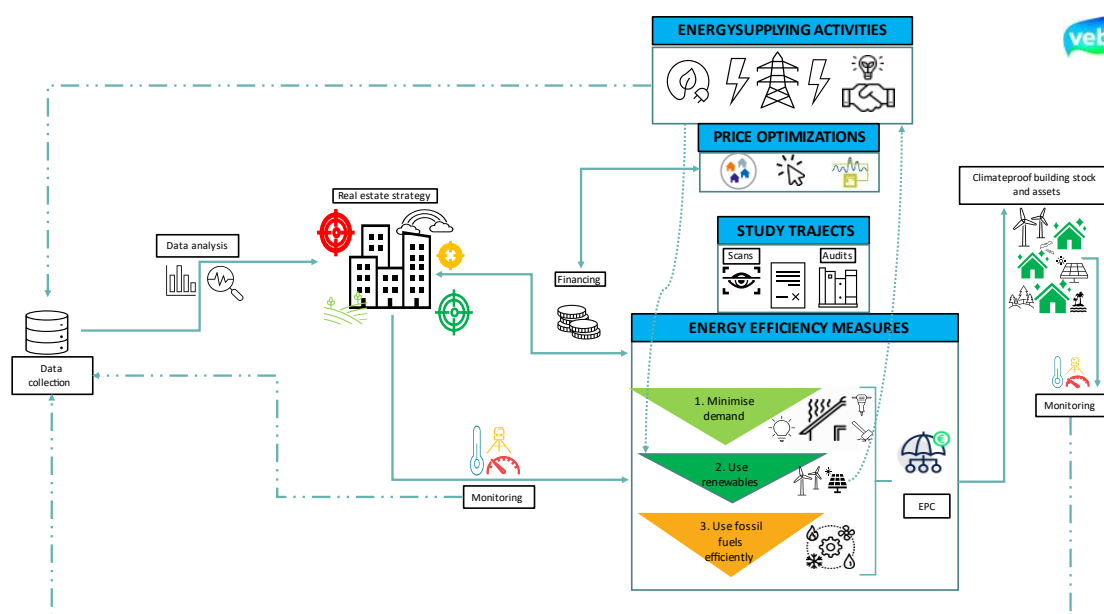
1.4 Concept and methodology

Replicating the Vlaams Energiebedrijf Model: Advancing Energy Efficiency Initiatives

The crOSSfit methodology will largely draw from the model being developed and implemented by VEB at the regional scale of Flanders. In the figure below a graphic overview is given of the services that are offered by VEB. In broad outline, VEB consists of 2 servicing departments. On the one hand the energy supplying activities – with the extension of possible price optimizations, such as the participation to the imbalance market – and on the other hand the one-stop-shop department related to renewable energy and energy saving measures (EE dep).

Key strengths of VEB OSS:

- **Collective Expertise:** efficiently streamlining government procurement and tenders, i.e. no need for separate appointments of government agencies
- **Circular Integration:** Embedding circular and bio-based principles in contracts, aligning with European standards.
- **Consolidating oversight:** preventing lock-ins like installing solar panels before considering insulation needs. This can be done thanks to our central front-office request portal and back-office terra for the monitoring.



Within the EE dep, the operational focus is on the development of framework agreements. These agreements, tailored towards a specific energy technology or service, alleviate the need for public authorities to go through individual tendering procedures, because they are compliant with EU Procurement Directives. One or more contractors can enter such a framework agreement by prescribing the applicable terms and conditions. A broad range of eligibility criteria are considered (for example: financial KPI's such as solvency, liquidity, results in a simulation project, track record with reference projects, communication plan, sustainability commitments...).

An overview of the existing framework agreements can be seen in the table below. The represented amounts are shown without VAT:

Framework agreement service	Starting date + info	Investment volume upper limit	Framework agreement service	Starting date + info	Investment volume upper limit
Real estate strategy	March 2023, First version	€9.000.000	Building envelope	February 2021, first version Q1 2024,	€96.000.000

				Third renewal	
Photovoltaics (incl. small energy storage)	May 2023, Third renewal	€85.000.000	HVAC	June 2020, First version + will be renewed soon	€35.000.000
Power Purchase Agreements	January 2023, Second renewal	€52.500.000	Relighting	February 2020, First version	€10.000.000
Facilitation of Energy performance contracting	November 2019, first version + Will be renewed soon	€3.500.000	Lighting as a service	September 2022, first version	€12.000.000
Energy performance certificates	May 2023, First version	€12.000.000	Monitoring as a service	August 2023, first version	€5.000.000
Study trajectories	March 2023, Third renewal	€16.500.000	Energy scans and audits	December 2021, third version + will be renewed soon	€6.500.000
Building professionals	Under development		EV charging infrastructure	October 2023, first version	€12.400.000
Ventilation audits	May 2023, first version	€8.000.000	Automatic control engineering	February 2021, First version	€435.000

For municipalities to decide on which energy saving measures they want to implement, 3 fundamental pillars are indispensable: 1) data, information and energy management 2) the real estate strategy and 3) financing. These pillars are pivotal across the value chain and function as a continuous plan-do-check-act cycle. Robust data management is a necessary input for making informed decisions on your building stock. Within your real estate strategy, you combine several external data sources (e.g. demographics, mobility, landscape, environment...) with the crucial internal elements (vision; overall organizational strategy, human resources...) in order to determine the future path (stay, stretch or leave) of your building stock. With that in mind and considering several financing options, you can determine what kind of refurbishment scenarios are applicable in a specific building. After a renovation took place, it is also primordial to keep track of the energy consumption and energy savings such that a continuous feedback loop is ensured, allowing for the integration of lessons learned and a possible further refinement of the real estate strategy. This iterative process not only enhances the adaptability, but also fosters resilience and innovation. In essence, these three pillars, are somehow intertwined, but are individually essential for the success of energy transition projects.

Considering the first pillar, it is noteworthy that VEB is developing and governing the Terra database for the identification of potential energy saving measures. As such, Terra combines several data sources (energy scans, audits, consumption data...) and visualizes these through dashboards. With the feature of the Energetic Masterplan, organisations can make investment roadmaps, considering pay back times and the climate impact of energy saving measures. For the pilot regions, it could be worthwhile to tap on a similar - albeit a light version - approach of data collection.

It is essential for the implementation of the crOSSfit Project that the activities to be implemented within the 3 pilots follow the VEB model mission to unburden the public sector towards more sustainable and efficient energy management and support it in achieving its climate objectives. To this end, these pilots will embody the strategic guidelines for a one-stop-shop methodology:

- to alleviate the organizations that purchase in accordance with the national/regional Public Procurement Acts in the field of integrated sustainable energy management.
- to act as pivots and facilitators in the energy market for the broader government.
- to become a catalyst for open data on sustainable energy management and evaluation of the climate objectives of the hosting countries and EU as whole
- to direct and stimulate innovation in energy technologies.

This methodology provides a clear added value to the target groups in the pilot countries in terms of technical expertise, legal unbundling, budget, and financing. By replicating the favourable elements of the VEB OSS model, the piloting institutions will be able to:

- provide energy expertise,
- purchase energy cheaply, innovatively, and quickly,
- remove barriers to investments in energy efficiency,

- support the achievement of sustainability and energy objectives.

In the meantime, VEB seeks for further introspection and evaluation of the own services, enabling the improvement of current suboptimal performance of certain framework agreements and explore financing engineering models. This will lead to an additional set of lessons learned and best practices that can equally be transferred towards the piloting countries.

Involvement of Public Authorities and enhancement of public procurement processes in pilot regions

In order to better integrate the public authorities concerned, a number of activities are planned in the project, including capacity building sessions, workshops, invitation to brainstorm sessions, outreach campaigns, press releases, media, etc. Stakeholder mapping in T7.2, targeted outreach as outlined in T6.2.2 and co-creation activities with relevant public stakeholders in WP4 will ensure an effective integration. For Greece and Portugal, piloting municipalities have already been identified and are committed to participating in the project.

In Flanders, all public tenders are published on the Belgian public procurement forum: <https://www.publicprocurement.be/>. Similar platforms exist in the piloting countries. In WP3, it will be examined whether the proposed business model with the framework contracts and the cost covering fees can work equally well in the pilot countries. Partner SEFA has established a broad range of standardized project finance collateral which will be utilised as benchmarking tools in the public procurement processes. These project finance materials cover standardized contracts, risk assessment, ESG, KYC and further aspects. Applying such standards to the procurement process will ensure better quality, faster evaluation and higher likelihood of third party finance to be engaged in these projects.

Improve current suboptimal frameworks via financing engineering models

In WP3, our primary focus is to design and establish funding structures that align with the substantial amounts required for the public sector to meet the 2030 and 2050 objectives. A crucial aspect, when engineering innovative financial approaches is obtaining initial approval from National Eurostat offices to ensure compliance with their internal guidelines. Scaling such funding solutions without consolidating them into the national budget is essential to avoid breaching the Maastricht criteria. It is essential to grasp the flexibility that national Eurostat offices are willing to offer, particularly when seeking confirmation of compliance in the design of funded solutions that involve private finance sources. Statistical national offices, especially in countries recently upgraded to investment grade like Greece, play a pivotal role, and solutions attractive to investors should also be sustainable from a national balance sheet perspective.

The second key driver in WP3 involves establishing Energy Retrofit funding structures that primarily rely on private sector involvement, with budgetary sources acting as an equity contribution. The goal here is to spread budget allocation across numerous projects (by bundling), achieving the right balance between debt and equity to maximize available funding under various programs while enhancing private sector contributions. The financial sectors need for size is a key driver in CrOSSfit's approach.

Financial structures, adhering to legal and PPP limitations, will aim to be designed within the off-balance-sheet requirements of Eurostat, with a focus on funding tenor and energy-saving achievements. CrOSSfit's ability to conduct bulk tendering is expected to secure better purchase conditions, leading to improved payback times and triggering lower funding costs by accessing the wholesale capital market rather than the retail market, where rates are typically higher.

WP3 will delve into the intersection of Eurostat compliance and bulk tendering for funded solutions, aiming to raise more finance based on a limited equity contribution.

Strategic Pilot Location Selection: Emphasizing Geographic Variations and Tailored Solutions

The selection of pilot locations in Catalunya (Spain), Greece, and Portugal for the crOSSfit project is driven by a strategic approach to address diverse regional contexts and challenges. These locations were chosen considering their distinct characteristics, regulatory frameworks, energy transition landscapes, and ability to access the wholesale capital markets be it for private or public debt market products.

Portugal, with its own set of energy transition objectives and administrative structures, provides another distinct context for the crOSSfit project. The selection of Portugal contributes to the project's ambition of tailoring solutions to the specific needs and intricacies of each region.

Greece, having recently been upgraded to investment grade, i.e. BBB- represents an emerging market with unique challenges and opportunities. The economic and regulatory environment in Greece differs significantly from the rest of the European Union, making it an ideal candidate for testing the adaptability and scalability of the crOSSfit model in a diverse setting. Furthermore, Greece's inability to access the international capital market over the past 12 years represents an opportunity to present investment grade products to the investor landscape which has been precluded from investing in Greece due to country credit rating issues and are as such having a pent-up demand for Greek investment products in their asset allocation strategy.

Catalunya, a Spanish region, offers a developed and mature energy market, but with specific nuances in governance, procurement practices, and regional energy priorities. The intention is to adapt and refine the crOSSfit model to fit within the

established Spanish energy landscape while addressing regional peculiarities. Region and Municipalities involved in the project will be implemented across strategic municipalities in Catalonia, including key areas such as Lleida, Tarragona, Girona, and Barcelona.

Emphasizing these differences underscores the crOSSfit project's commitment to avoiding a "one-size-fits-all" approach. Instead, the project seeks to develop a flexible and adaptable model that can be fine-tuned to align with the unique characteristics of each pilot location, whilst maintaining a similar approach. This semi-tailored approach aims to enhance the effectiveness and sustainability of the crOSSfit model across diverse European contexts, promoting its successful replication and scalability in the future.

Current status and shortlisted pilots

In Portugal RdA has two pilots identified:

Pilot case 1: AdEPorto – Porto Energy Hub

AdEPorto is the Energy Agency of Porto covering 10 municipalities from the Metropolitan Area of Porto north of Douro River (AMP-ND). AMP-ND accounts for around 11% of the overall Portuguese population, and 20% of the public owned social housing. AdEPorto has implemented the Porto Energy Hub (PEH), a one-stop-shop to support building renovation and energy poverty alleviation. Nonetheless, it is running as a facilitating OSS for housing building only. It does not support public service buildings nor enables private financing mechanisms for the renovation actions. All renovations to public buildings occurring with PEH support are publicly funded.

As such, with the support of crOSSfit, this pilot intends to improve PEH services, building capacity on the crOSSfit facilities, namely when it becomes the use of private investment under the strict Portuguese public procurement rules. PEH is already running, though as mentioned, only as communication and dissemination vehicle of initiatives. Although AdEPorto has always shown interest in leveraging the OSS to a higher level it has not succeeded such endeavours for two reasons: 1) lack of expertise and knowhow and 2) lack of funding for that specific process.

Noteworthy, the capability of using ecoAP (the legal framework for public energy performance contracting in Portugal) to public buildings, e.g., swimming pool, has never been explored. As such, this pilot intends to enable the Porto Energy Hub OSS as the bridge between cities and ESCOs, in supporting the municipalities in the development of the contract specifications. For the time being, in Portuguese municipalities, the implementation of an energy performance contract for buildings has never occurred primarily hindered by challenges such as a shortage of technical expertise, lack of human resources and limited capacity within municipalities, compounded by the intricacies of the process. CrOSSfit aims to address these limitations through its insights and learnings and the exploration of innovative funding techniques.

From an overview of the municipalities in the AMP-ND it is expected that crOSSfit can contribute to the implementation of at least 7,5 MW photovoltaic solar power implemented during crOSSfit (25 MW 5 years after)

Pilot case 2: Municipality of Almada

Almada is a Portuguese city located in the Lisbon Metropolitan Area with more than 88 000 inhabitants.

Within its energy transition goals, the municipality envisions to set up an OSS to support municipal building renovations. The first steps were already given with the support of EU City Facility, performing a first overview of possible options for an OSS. The municipality envisions the deployment of an energy community through the implementation of 5,25 MW (17,5 MW 5 years after) of photovoltaic solar power and the implementation of other innovative business models to finance social housing renovation.

OSS structures in Portugal:

In Portugal, the Porto Metropolitan Region and Almada will benefit from the VEB model replication, enabling them to increase their services and financing options in public building and facilities. This will help bridge between cities and ESCOs, in supporting the municipalities in the development of the contract specifications, by facilitating new business models for overcoming public procurement actual constraints.

The Porto Energy Hub will integrate the crOSSfit model in its service offerings as an OSS. The municipal desks are centralised at the Porto Energy Hub, which supports all the renovation actions from any of the local desks. These latter are intended as a proximity place to reach a higher audience. The OSS is running for less than 2 years, and has mainly supported social housing deep renovation, though it is also supporting smaller private projects. Nevertheless, the mean energy savings achieved by project is 44%, mainly due to energy efficiency renovation, representing a total of 19 095,72 MWh/y in 33 projects (more than 2 150 dwellings). The renewable energy supported so far is 358,85 MWh/year.

The EU funding under crOSSfit, will enable expand the target clients, and increase it also to other municipal buildings and facilities other than residential buildings. It will support to overcome public contacting burdens and enable increasing the reach of the OSS support and thus, increase the AMP Energy efficiency and renewable energy share in the territory.

Almada OSS is kick starting as a municipality driven OSS given its decarbonisation established objectives, mainly through a

facilitation business model to public and private buildings and facilities. Nevertheless, with the EU funding support, it intends to go for a coordination business model. Also, given its geographic location, its exploitation to the Setubal peninsula will be evaluated and tested. Almada is also part of Lisbon Metropolitan area, the main urban area of Portugal. Thus, replication and exploitation of Almada OSS results and operability will be sought after.

The establishment of these OSS offerings will take place in T6.5 and result in a business plan a sustainability strategy to ensure a successful post-project exploitation.

In Greece SCN identified the following 2 pilot cases:

Pilot Case 1: (OSS in Peloponnese – Energy Efficiency of Municipal Buildings)

The Pilot Case 1 aims to facilitate the energy upgrade of municipal buildings in the Peloponnese region. The Peloponnese region is situated in southern part of mainland Greece, covering most of the Peloponnese peninsula. The region has an overall population of 577.903 representing in excess of 5% of the Greek population, and is divided into five prefectures (Arcadia, Argolis, Corinthia, Laconia and Messenia), which are further subdivided into 26 municipalities.

The definition of Nearly zero-emission buildings (NZEB) in existing buildings has been set in the Law 4122/2013 and its application is determined in the national NZEB study issued in December 2018. The study also establishes plans to renovate the existing building stock to become NZEB. With the transposition of Directive 844/2018 into national legislation, in 2020, there is an obligation to establish a long-term renovation strategy, to support the renovation of the national stock of residential and non-residential buildings, both public and private, into a highly energy efficient and decarbonised building stock by 2050, facilitating the cost-effective transformation of existing buildings into nearly zero-energy buildings.

The initiative will involve two neighbouring Peloponnese Municipalities, Municipality of Messini and Municipality of Oichalia, which will be committed to enhancing the sustainability and energy performance of their public infrastructure. The focus will primarily be on key municipal buildings, which make up a large part of the municipal property and are in dire need of renovation. The pilot will establish an OSS for neighbouring municipalities in order to support or even lead the line of action. Comprehensive energy audits will be conducted to identify areas with the greatest potential for energy efficiency improvements. It will run technical assessments to examine the feasibility of integrating renewable energy sources, such as rooftop solar panels, leading to complex energy upgrade projects and explore measures for improving insulation, lighting, heating and cooling systems. In a second stage, a project plan will be developed for each municipal building, outlining the scope, budget, and timeline for the energy upgrade measures. The municipalities, driven by the OSS will then follow proper tendering procedures to select qualified contractors or suppliers for the implementation of each proposed projects and seek finance to implement these solutions and technologies. The crOSSfit Project team will support in tendering and public contract conclusion for the implementation of the energy retrofitting projects.

This holistic action will target on lowering the carbon emissions associated with municipal operations, following national and international sustainability targets and decrease energy expenses for the municipalities, resulting in financial savings that can be reinvested in alternative projects. The Pilot's solution overall aim will be to obtain substantial energy savings and reduced operational costs for the municipalities and enhanced energy efficiency in public buildings, contributing to the comfort and well-being of residents and employees. A replicable model will be developed that other municipalities in the Peloponnese region and beyond can follow to upgrade their own public buildings.

The pipeline consists of 12 buildings (4 municipal buildings in Municipality of Messini, 8 municipal buildings in Municipality of Oichalia), with a projected total of 2,837,000€ of investment (Messini), 208,765€ of investment (Oichalia) needed to retrofit a total of 3003 m2 of floor space to be renovated (Messini), 1590 m2 of floor space to be renovated (Oichalia).

Types of buildings targeted are schools, administrative, cultural buildings.

Pilot case 2: (Energy Communities in the Southern Aegean Sea)

The Energy Community of Halki Island "Calhion", the first Energy Community in the Dodecanese, was established on 19 May 2021 with its headquarters in Halki and with the completion of all the procedures provided for, it exists fully as a legal entity. Among its founding members is the Municipality of Halki, which demonstrates the support of the local government to the Community. With the sponsorships and donations of numerous companies of private and public interest and the support of the government at central and regional level, the Energy Community of Halki has under its jurisdiction a fully operational solar power plant using photovoltaic panels. The installed capacity of the station is 1MW, a size sufficient to meet the electricity needs of the residents of Halki.

The Municipality of Halki envisions the creation of more community-driven energy projects that promote renewable energy sources and examine funding opportunities for sustainable initiatives. The to-be-established OSS structure will cover the whole island of Halki. This pilot case will focus on the existing Energy Community in Halki, highlighting successful collaboration among local residents, businesses, and the municipality and will aim to transform it into a leading initiative for the islands of the Southern Aegean Sea. The primary goal is to harness renewable energy, reduce energy costs for citizens, and enhance the economic and environmental sustainability of the nearby islands as well, demonstrating best practices and examples of the already innovative Energy Community of Halki. The Pilot will also aim to improve the existing mechanism and

seek for further financing of renewable projects for Halki Island making it a local leader in sustainability and net zero municipalities/entities.

By the end of the Project the following actions will be examined:

- Facilitation of the integration of renewable energy sources, such as solar and wind, into the local energy grid.
- Engagement of citizens and local businesses in the development, funding, and management of renewable energy projects, fostering a sense of ownership and community pride.
- Evaluation of the cost efficiency and cost benefits of utilizing renewable energy sources and potentially lowering energy bills for residents.
- Encouragement for investments in renewable energy infrastructure and technology, creating new economic opportunities on the islands of the Aegean.
- Assessment of the island's renewable energy potential, including solar, wind, and other sustainable sources.
- Installation of sensors and software for monitoring for PV Park's efficiency measurements.
- Cost efficiency analysis, comparing energy bills before and after implementation.
- Assessment of the economic impact of renewable energy initiatives on Halki, including job creation and local economic development.
- Investigation of various funding options, including grants, subsidies, and crowdfunding, to secure financial resources for new projects' implementation.
- In case the island exceeds the energy demand, exploration of ways to manage exceeding energy through storage or selling the surplus.
- Raise of awareness within the Halki community about the benefits of renewable energy, encouragement of citizen participation in the projects, and education of the public about cost-efficiency and sustainability.

In this case crOSSfit will leverage on VEB's experience based on their successful PPA in Ghent which has been recognized and crowned with a Procura+-award.

OSS structure in Greece: the to-be-established national network of OSS structures will benefit from VEB's experience in engaging local municipalities, and partner SCN will act as a replication facilitator across their network of sustainable cities. The plan for establishing the OSS will include:

1. Stakeholder Mapping and Engagement: Identification and engagement with relevant stakeholders who will be involved in staffing the OSS, such as scientific associates/technical partners of the Municipality, technical service experts and consultants.
2. Organizational Development and Process Guidelines: Develop the organizational structure for each OSS and establish clear guidelines for the processes that need to be followed. Create templates and best practices for the tendering process, ensuring compliance with national laws.
3. Training Sessions: Conduct training sessions to inform stakeholders about their roles and responsibilities within the OSS and to provide guidance on carrying out their duties effectively.
4. Continuous Communication and Updates: Ensure ongoing communication to keep stakeholders informed about any changes or updates to procedures, encouraging transparency and adaptability within the OSS.

The establishment of this OSS offering will take place in T6.4 and result in a business plan a sustainability strategy to ensure a successful post-project exploitation.

In Spain 3 pilots have been identified, the piloting will be rollout out by L'Energètica (ENER) is a public company specializing in the energy savings and generation of renewable energy. ENER was established on March 6, 2023, and since September it has been fully staffed and is operational since then. Upcoming statutory modifications - expected in the summer of 2024 - will include energy efficiency among other areas, in response to consistent demands from public entities and the government, and they highlight ENER's commitment to expanding their scope to include these energy efficiency initiatives. Through this project, ENER aims to demonstrate how PV installations together with energy efficiency installations can effectively contribute to achieving a 100% renewable energy transition. This combination of energy efficiency measures and renewable energy sources will provide the necessary energy for the electrification initiatives ENER plans to undertake. As this is a global operation in all viable public buildings in Catalonia, ENER will have the facility to carry out collective self-consumption within a radius of 2km from each of the facilities, thus defining a "neural network" of shared energy supply to all public buildings. Moreover, by carrying out both generation and commercialisation activities, ENER can make use of 100% of the available surface area, even if surplus energy is generated, as with this neural network of buildings it can be used within the Generalitat itself.

Pilot Case 1: ESCO Model for Renewable Energy and potential Energy Efficiency measures in Generalitat de Catalunya Buildings

ENER proposes the implementation of an innovative Energy Service Company (ESCO) model in collaboration with the Generalitat de Catalunya to integrate renewable energy solutions and optimizing energy efficiency across its diverse range of more than 1100 public buildings.

The pilot project will include a thorough energy audit of these buildings to identify potential areas for energy efficiency

improvements, such as upgrading lighting systems, enhancing insulation, and optimizing HVAC systems. The comprehensive approach aims to incorporate PV on the roofs of key governmental structures including but not limited to the Department of Health, Justice and various administrative offices. Additionally, our proposal involves the installation of cutting-edge energy storage solutions to ensure the efficient utilization of surplus energy generated by the photovoltaic systems (that would be approximately 15-20MW of installed power), thereby enabling a balanced integration of energy consumption and production curves. Region and Municipalities Involved: the pilot project will have an impact on all municipalities where there are public buildings; it will be a very distributed operation.

VEB's executed a similar project with energy audits for 1000 healthcare buildings through our framework agreement of energy audits, lessons learned and knowhow transfer will be done in this pilot case.

Pilot Case 2: Development of Small-Scale Wind and Solar Parks with Energy Storage

Catalonia is an area rich in terms of wind resource and has a high solar hour. However, the development of wind farms and solar parks it is still far from the needs of the Catalan society.

The climate crisis accentuated the demands for quick renewable energy developments. For this reason, ENER proposal is to build small-scale wind and solar parks with storage that can be developed with the participation and acceptance of the social environment. The size of these projects will be lower than 18 MW in the case of wind farms and less than 5 MW for solar parks. In this pilot case crOSSfit will built upon VEB's experience from their prior PIO Wind project.

There are four models of participation that are being explored by ENER depending on the characteristics of each project: shared self-consumption, crowdlending/crowdfunding, payment in kind, energy communities. CrOSSfit will support in the piloting phase by providing with financial knowhow on how to best structure the above from a financial standpoint, furthermore VEB's framework agreement on power purchase agreements of solar panels with citizen participation, will be analysed and replicated.

Pilot Case 3: Design of Charging Hubs for Heavy Mobility with Renewable Energy

In response to the growing demand for sustainable transportation solutions, ENER is proposing the establishment of strategically located charging hubs across Catalonia to support the electrification of heavy mobility, specifically targeting interurban public buses and freight trucks, with ultra-fast, ultra-high-power (between 200 and 400 kW) rechargers. These hubs will be equipped with integrated renewable energy systems, comprising both wind and solar technologies, to facilitate efficient and eco-friendly recharging operations for the region's heavy transport network.

The pilot project will involve the development of charging hubs in key transportation nodes within major municipalities, such as Barcelona, Tarragona, Girona, and Lleida. These hubs will be designed to accommodate multiple vehicles simultaneously, providing rapid charging capabilities to minimize downtime and optimize operational efficiency for the transportation sector. ENER's comprehensive approach will include the integration of energy storage solutions to ensure a consistent power supply, even during periods of low renewable energy generation.

Region and Municipalities Involved: the project will be implemented across strategic municipalities in Catalonia, including key areas such as Lleida, Tarragona, Girona, and Barcelona.

OSS structure in Spain: a regional OSS structure will be established that will benefit from VEB's experience in engaging local municipalities, and partner ENER will integrate the OSS service offer within their structure. The establishment of this OSS offering will take place in T6.3 and result in a business plan a sustainability strategy to ensure a successful post-project exploitation. This comprehensive strategy will engage municipal and local entities, such as municipalities, county councils, and local agencies. At present, L'Energètica primarily collaborates with the Government of Catalonia and its Public Sector, and this project serves as an opportunity to extend its services to these local entities. The current service model encompasses a "360°" approach, providing specialized technical, legal, and communicative support for energy projects. In the work plan, we could propose the following tasks to establish the OSS:

1. Engage with municipal and local entities to understand their needs, priorities, and challenges related to energy efficiency and renewable energy adoption.
2. Customize the existing "360°" service model to align with the specific requirements and preferences of municipal and local entities, ensuring that the OSS provides tailored support for energy projects.
3. Offer continuous technical and legal assistance to local officials and staff throughout all project phases. This would include personalized guidance and ongoing monitoring to address specific needs and ensure successful energy efficiency and renewable energy initiatives.
4. Pilot implementation: Launch pilot projects in collaboration with select municipalities or local entities to test the effectiveness of the OSS model and refine processes based on real-world feedback.

By executing these tasks, L'Energètica aims to establish a robust and sustainable OSS framework that facilitates the seamless implementation of energy efficiency and renewable energy projects across municipal and local entities.

In Belgium, the pilot leader, VEB, has pinpointed the following pilot cases: 20,000 buildings within the entire public

municipal housing stock in Flanders. It is anticipated that approximately 6.45% of these buildings will undergo renovation through the newly established crOSSfit financial structures within the five years following the project. This translates to about 1,289 buildings, with a collective investment value of 2.34 billion Euros. During the project duration, the initial pilot phase will encompass 10 buildings (equivalent to 18 million Euros), effectively deploying the innovative approaches of WP3 and leveraging SEFA project finance collateral.

Expanding Potential: Project Growth and Replication Strategies

Expanding on the outlined pilot initiatives, the scale of the replication potential across each of the piloting countries becomes evident. In the final 12 months of the crOSSfit project, we will strategically intensify efforts, focusing on maximizing growth, replication, and exploitation. This will be achieved through the organization of country-specific roundtables, sharing best practices derived from successful pilot deployments (WP7) led by SEFA, and disseminating lessons learned via WP5. In light of the outreach of RdA's extended Portuguese network, SCN network across 71 Municipalities communicating the findings will be an ongoing process, ENER of Catalunya will reach out via its regional network, whilst VEB will follow the same actions in Belgium.

Furthermore, it is expected to showcase the results of the pilots via the Covenants of Mayors and other similar events as such achieving a pan European outreach as described in section 3.5 Communication, dissemination and visibility.

The project is poised to leverage accumulated knowledge, best practices, and successful models, fostering widespread adoption through collaboration of all partners, and showcasing of success factors leading to the realisation of the individual pilot projects with specific quantifications and comprehensive insights into the anticipated impact will be detailed in the dedicated Impact section.

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1.5 Upscaling results of other EU funded projects

SURE2050 (2019-2023)

SURE2050 (Sustainable Real estate) introduced Strategic Public Real Estate Management (SPREM) within the public sector in Flanders. Large scale investment plans were drafted by public entities in Flanders. Thanks to the project, SPREM raised awareness in municipalities of the huge challenges involving real estate as a crucial component of the energy transition. The fruits from SURE2050 (its framework, templates, data-collection methods) can definitely help the pilot countries in strategically analyzing the future of their building stock and eventually developing a project pipeline.

LAUNCH H2020 (2019 – 2021)

LAUNCH H2020 was highlighted as a leading project by the European Commission in Energy Efficiency Finance for its broad involvement of stakeholders and real-life impact of standardized project finance materials [1]. These include an investor-grade Energy-as-a-Service contract, a standardised risk assessment protocol for energy efficiency projects, tools for project developers to access growth capital, and market-tested value propositions for project developers' end clients. €2.1 million in deals were closed during the project itself, and a further €31 million of investments being processed for finance at the end of the project. LAUNCH has engaged close to 500 project stakeholders and laid the groundwork for broader and deeper engagement through PROPEL and now crOSSfit.

PROPEL H2020 (2021 – 2023)

In addition to all of the LAUNCH standardized materials, learnings and processes, the PROPEL H2020 project adds project finance modules, such as an ESG risk module, a KYC module and a standardized loan application guideline and integrates all of the LAUNCH and PROPEL tools into a streamlined digital platform, hosted by SEFA. PROPEL established an end-to-end project processing workflow, allowing the consortium to quickly identify and pre-qualify pipelines of sustainable energy projects, and then to match them with and introduce them to suitable third-party investors. The ever-growing network of financial partners from LAUNCH and PROPEL will be fully engaged in the crOSSfit project.

CITIZEE (2019-2022)

CITIZEE was a European funded project (HORIZON) with the aim of luring private and blended finance into the energy transition of public buildings. VEB developed a financing scheme for healthcare and education buildings, together with ESCO's and the Flemish Energy and Climate agency. As a result, 20 energy performance contracting trajectories were identified. The lessons learned and the best practices will be considered in WP3 of crOSSfit.

ENERGATE (2023-2025)

Energate is a LIFE funded project that aims to establish a smart energy marketplace for energy efficiency investments in buildings. The ENERGATE marketplace will be implemented through an ICT-based platform, which, on the one hand will aim to mobilise and accelerate the creation of NECP-compatible credible project pipeline and on the other, it will aim to facilitate the financial closure and project implementation by offering standardisation, risk mitigation and appropriate "packaging" of investments. Energate will explore the investments in the public buildings. ESC and SCN are part of the consortium and will ensure that the knowhow and the lessons learned from Energate will be considered in WP2 and WP3.

PEER (Porto Energy ElevatoR) (2021-2024)

The EU-funded PEER project aims to develop the Porto Energy Hub to support a novel renovation programme in the Porto Metropolitan Area Douro – North Douro region, AMP-ND (Portugal). Specifically, the project will develop tools to overcome

market barriers for social and low-income households. PEER will focus on delivering energy efficiency to improve housing conditions in AMP-ND, namely on the interventions on reducing building energy needs. It will also set up a one-stop-shop promoting energy-efficient building renovations. The lessons learned and the best practices related to the set-up of one-stop-shops will be considered in WP2 gap analysis and WP4 in the piloting work package of crOSSfit.

Smart Cities Marketplace

The Smart Cities Marketplace was created with the aim of bringing together European smart cities projects with investors and advocating best practices on a European Union scale, to seep up the green transition. The primary aim of this platform is to establish an expansive marketplace for transformative initiatives, facilitating the collaboration of cities, authorities, companies, and investors to exchange experiences and forge partnerships. CrOSSfit will actively participate in the Smart Cities Marketplace, ensuring that the experiences and best practices promoted on the platform become integral to the implementation of crOSSfit initiatives.

[1] <https://cordis.europa.eu/article/id/435518-a-eur-150-million-pipeline-bringing-liquidity-to-energy-efficiency-investments>

1.6 Complementarity with other actions

VEB: Project EBM – BBC:

At the time of writing, VEB is working on a project together with the Agency of Internal Affairs (ABB) of Flanders, to integrate the feature of the Energetic Masterplan in Terra with the Policy and Management Cycle (BBC), a regulatory framework for financial planning, accounting and reporting, imposing 2 mandatory KPI's for financial equilibrium within municipalities. It's this project ambition to deliver an up and running tool by September 2024 such that the results (such as financial roadmaps for energy renovations tailored to the accounting software of local municipalities) can be considered within the crOSSfit project as well. It's worth investigating to what extent this tool would be replicable towards the pilot countries.

FLESPI (VEB-ELENA):

This is a program in Belgium, supported by the ELENA program, successfully realized a remarkable 99 million EUR in sustainable energy investments within the public sector. Through strategic focus areas, such as building trust in energy efficiency (EE) investments and standardizing procurement procedures, VEB transitioned from a small project facilitator to a market leader in overcoming barriers to EE investments. With an emphasis on capacity building, the program broadened the scope of projects to address diverse challenges faced by public building owners. The Program Delivery Unit transformed VEB into a one-stop-shop, offering off-the-shelf or tailor-made services, resulting in a total investment of 111.95 million EUR across 300 projects in EE and Renewable Energy Efficiency. VEB's commitment to operational excellence and innovation positions them as a crucial partner for the public sector in achieving and surpassing climate goals for energy efficiency and renewables.

Belgian federal level

The National Energy and Climate Plan (2021-2030) whose important focus is on promoting a sustainable energy transition to reduce greenhouse gas emissions and combat climate change. In addition, the federal government aims to become a climate-neutral organization itself. This means that the federal government wants to reduce and offset its own greenhouse gas emissions so that net emissions become zero. This includes implementing energy saving measures in government buildings, promoting renewable energy production and taking other measures to reduce the climate impact of government activities (National Energy and Climate Plan 2021-2030. Part A - National Plan, 2019).

Flemish level

The Local Energy and Climate Pact (LEKP) expresses the ambition to make all public buildings in Flanders energy efficient by 2030. The LEKP 2.1 (2022) encourages collectively organized energy-saving renovations. Public buildings are ideally included in a long-term real estate strategy. The objective of emitting 55% less CO₂ by 2030 is viewed at entity and not at building level, which means that it is best to renovate a share of public buildings to become fossil-free in order to achieve the most cost-efficient possible realization of the long-term objective (Agency Domestic Board, 2022).

In the Climate Strategy 2050, Flanders expresses the ambition to reduce greenhouse gas emissions from the non-ETS sectors by 85% by 2050 (compared to 2005), with the ambition to move towards complete climate neutrality (Flemish Government, 2019).

The Flemish Energy and Climate Plan (VEKP) 2021-2030 states that the Flemish government must set a good example by making its own buildings and infrastructure more sustainable and climate neutral by 2050. It is important for public authorities to make targeted investments in energy efficiency through master plans. For the Flemish Government, the Buildings Action Plan of the Facilities Company and the Energy Efficiency Action Plan will be continued and optimized. The Terra platform will further be used for reporting and benchmarking energy use data in the public sector (Flemish Government, Flemish Energy and Climate Plan 2021-2030).

Finally, the Flemish long-term renovation strategy for buildings is part of a number of broader strategies of the Flemish Region. This includes specific policy measures and actions aimed at public buildings. Schools and healthcare institutions account for the largest share of public buildings and technical installations (tunnels, locks, public lighting, etc.). By focusing the long-term renovation strategy for public buildings on these categories, the most profits can be made.

Spanish federal level

In Spain, the Council of Ministers has approved the PLAN +SEGURIDAD ENERGÉTICA (released in 2022) as a contingency plan to address the energy price crisis. This plan, utilizing funds from the Recovery, Transformation, and Resilience Plan (PRTR), consists of 73 complementary measures organized into six major blocks. The first block, "energy saving and efficiency," focuses on the public sector and includes measures such as energy-saving in public buildings, accelerated deployment of self-consumption in public facilities, and energy performance contracts. This national initiative underscores Spain's commitment to showcasing the exemplary role of public authorities in decarbonizing assets and leading the European clean energy transition. (MITECO 2022) CrOSSfit is complimenting this action as crOSSfit's objectives are aligned with the acceleration and deployment of energy savings and efficiency in public buildings.

EEFIG (2013 - 2023)

The Energy Efficiency Finance Industry Group (EEFIG) comprised over 200 organisations working on energy efficiency investments throughout the European Union. These included financial institutions, investors, bank associations, energy efficiency practitioners, academia and other experts across the finance market. Joule Assets Europe has been part of EEFIG since 2015, participating in working groups, supporting the writing of EEFIG reports and contributing project performance data to the De-risking Energy Efficiency Platform (DEEP). EEFIG represented the most comprehensive group of sustainable energy investors in Europe today, and many of the SEFA Finance Partners have been recruited through the EEFIG network in the past. Existing connections to former members of EEFIG will continue to be an important network for crOSSfit financial stakeholder involvement.

One key recommendation from EEFIG is the establishment of systems or structures to transparently assess the technical and financial risks of building energy renovation projects and their contracting structures. Addressing this barrier, crOSSfit introduces and adapts the VEB model, integrating entities or departments within the public sector at regional or municipal levels. These entities will facilitate a transparent process regarding the technical, legal, and financial risks of building energy renovation projects in the tendering process. By providing clear guidelines and templates, crOSSfit empowers different bodies to efficiently deploy and streamline deep retrofits in the public domain.

The Recovery and Resilience Facility (RRF)

The RRF, in the four pilot countries, aims to alleviate the economic and social impact of the COVID-19 pandemic, fostering sustainability, resilience, and preparedness for green and digital transitions. Comprising six pillars, the RRF facilitates climate neutrality and digital transition aligning with crOSSfit's objective to facilitate and increase the level of energy efficiency and deep renovation projects in the public sector.

The RRF is at the same time also at the heart of the implementation of the REPowerEU Plan, which is the Commission's response to the socio-economic hardships and global energy market disruption caused by the current Russian invasion of Ukraine.

Through its objectives crOSSfit supports EU climate targets and contributes to the REPowerEU Plan, addressing socio-economic challenges and promoting energy savings, supply diversification, and renewable energy deployment and will act as a contributor and multiplier in supporting the EU reach the targets.

1.7 Synergies and co-benefits with other LIFE sub-programmes

In relation to other LIFE sub-programmes, synergies related to the crOSSfit project are described below for the Circular Economy and Quality of Life and Climate Change LIFE subprograms:

Circular Economy and Quality of life

The objective of crOSSfit project is to facilitate the transition towards a sustainable, circular, energy efficient/climate resilient economy and a toxics-free environment, as well as to protect, restore and improve the quality of the environment. Circularity is part of quality considerations and awarding within the framework agreements influencing the choice for contractors in the tender process, VEB is already applying this principle in the framework agreement on building envelope which will be included as well during crOSSfit pilots. Therefore, crOSSfit is having an alignment with this LIFE sub-programme. Furthermore improving air quality or restoring the natural functions of ground and surface water are in line with the crOSSfit theme of renewing and improving energy efficiency and decarbonization of public buildings. Our proposal will demonstrate a clear showcase dimension to achieve the impacts foreseen by the European Union in the energy field.

CrOSSfit provides the necessary support and frameworks to create a streamlined tender process via a specialised entity or department at a local/regional/municipal level building upon best practices that contribute to lowering GHGs. CrOSSfit will also develop financial schemes that will scale up the involvement of the private finance needed in the energy transition.

In addition, by supporting the scaling up of investment in energy reducing and renewable energy activities in the public sector, crOSSfit will contribute to the goal of the Circular Economy and Quality of Life sub-programme to improve air quality, especially in those countries where energy generation for consumption within buildings is derived from fossil fuels, for example in Spain where 46,7% of its energy supply and demand is met with fossil fuels (<https://www.iea.org/countries/spain>).

CrOSSfit has a strong synergy with the **Climate Change Mitigation and Adaptation sub-programme**. The project's focus is on scaling and accelerating energy savings in the built environment in the public sector. Buildings in the EU are responsible for 40% of energy consumption, and account for 36% of the EU's energy-related GHG emissions. To achieve the EU's 55% emission reduction target by 2030 it needs to reduce buildings' GHG emissions by 60%, and €3.5 trillion of total investment will be needed to fund this decarbonisation. Based on Member States' current plans, the investment gap to 2030 is estimated at €2.75 trillion (GFI – Coalition for the Energy Efficiency of Buildings (CEEb) Europe (greenfinanceinstitute.co.uk)). CrOSSfit informs and influences policymakers on developing policy and legislation that can support the acceleration of the renovation wave in the public sector.

Regarding the LIFE Clean Energy Transition subprogram, where the crOSSfit project is included, the following synergies are described below:

LIFE-2023-CET-LOCAL: Technical support to clean energy transition plans and strategies in municipalities and regions

The topic aims to provide local and regional authorities with the necessary capacity, skills and organisational structures to deliver and implement plans and strategies for the clean energy transition (CET). Recognizing the pivotal role of local and regional authorities (LRAs) in achieving EU Green Deal objectives, many municipalities and public bodies have already committed to ambitious targets, as seen in initiatives like the Covenant of Mayors for Climate and Energy. CrOSSfit, through activities in various work packages (WP2, WP3, WP4, and WP5), will contribute by supporting LRAs, providing the necessary capacity, and facilitating the streamlined implementation of their clean energy transition plans through enhanced technical and financial skills in tender procedures.

1.8 Synergies and co-benefits with other EU policy areas

In addition to one of the primary energy-related objectives of the EU – to increase investment in energy efficiency measures and renewable energy generation, crOSSfit will contribute towards job creation, improved health, reduced energy poverty, education, the achievement of energy-related GHG emission reduction targets, and an improvement in energy security within the EU through the reduced reliance on imported fossil fuels.

Driving investment in energy efficiency improvements in buildings will generate significant employment across Europe. The IEA projects that for every USD1 million spent on energy efficiency improvements to existing buildings, 14.8 jobs will be generated, nearly three times the number of jobs created through investment in new electricity grids ([Energy efficiency jobs and the recovery– Energy Efficiency 2020 – Analysis - IEA](#))

Improving the energy efficiency of public buildings, including social housing, schools and other similar buildings, improves the health and quality of life of occupants.

Improvements in the building envelope leads to more efficient and cost-effective heating and cooling, and reduced incidences of damp, which positively contributes to a reduction in respiratory illnesses, cardiovascular diseases and allergies ([Health and wellbeing – Multiple Benefits of Energy Efficiency – Analysis - IEA](#)).

Green Deal

Europe wants to become the first climate-neutral continent. The European Green Deal provides the blueprint for the radical transformation that awaits us if we are to achieve that target by 2050. For example, the Member States have committed to reducing CO2 emissions by at least 55% compared to 1990 levels by the end of 2030 (European Commission, Working on the European Green Deal, 2023). Among the key measures there is a commitment to renovate 3% of the total floor area of public buildings annually and to increase the share of renewable energy for heating and cooling by 1.1 percentage points annually until 2030.

Fit for 55 for the building sector

Fit for 55 is a suite of legislative tools to deliver on the targets agreed in the European Climate Law and fundamentally transform our economy and society for a fair, green and prosperous future. Measures to promote decarbonization of buildings

are an integral part of Fit for 55, including:

- Indicative Member State Contributions to EU-wide energy efficiency targets
- Legal mandates to make energy efficiency a priority in planning and investment decisions
- Required renovation rates of 3% by Member States of the total floor area of all public buildings
- Energy use reduction targets of 1.7% per year in the public sector by Member States
- Recommended public sector use Energy Performance Contracts in the renovation of large non-residential buildings
- Contractual rights on heating, cooling and hot water

OECD – Building decarbonisation in cities and regions

In its efforts to contribute to decarbonisation of the real estate sector, OECD is implementing a place-based approach to decarbonise buildings with the aim to develop sustainable, inclusive and resilient cities and regions. The OECD project “Decarbonising Buildings in Cities and Regions” aims to identify best practices and challenges for both national and subnational governments in driving the decarbonisation of buildings. The project has started in 2021 with a multi-level governance framework to guide building policies, including energy efficient retrofits, installing high performance equipment and promoting renewable energy.

The OECD Programme Decarbonising Buildings in cities and regions supports countries, regions and cities to enhance their implementation of energy efficiency measures in buildings, through:

- Data and analysis: collecting key data in cities on buildings, energy efficiency and related policy environments in order to conduct in-depth analysis;
- Self-assessment: developing self-assessment tools to help policymakers design appropriate policies and identifying opportunities and barriers to implementation;
- Case studies: providing peer-learning opportunities and targeted policy recommendations to support local and national efforts to develop place-based building energy efficiency policies.

United Nations Sustainable Development Goals

The United Nations Economic Commission for Europe (UNECE) promotes development and dissemination of international standards in energy efficiency, and specifically, the Geneva UN Charter on Sustainable Housing and the UNECE Framework Guidelines for Energy Efficiency Standards in Buildings (the Framework Guidelines). Endorsed by the UNECE Committee on Sustainable Energy and the Committee on Housing and Land Management, the Framework Guidelines call for:

- Dissemination to ensure that national, regional and municipal leaders in the public, private, research and education sectors must be made aware of the framework’s vision, logic, practicality, and advantages.
- Education to provide information and guidance to all players to foster local development of building standards, codes and practices that are aligned with the Framework;
- Research through a collaboration among leaders in science and technology to focus on challenges in such areas as: (1) building components and materials; (2) building design, construction and monitoring; (3) energy generation and distribution; (4) integrated urban systems and life cycle management; and (5) strategies for each country and climate zone to be carbon-free by 2050;
- Consultation to establish formal and informal communication channels with local policy, market, and knowledge stakeholders for evaluation of impact, dialogue on impact strategy, addressing discovered or unanticipated challenges, and cultivating global consensus in support of the Framework;
- Participation through institution of networks of support and engagement among leading corporations, foundations, universities, professions, civil society and others with the array of resources – intellectual, experiential, financial, and relational – that will be required to enable deep transformation.

CrOSSfit plays a key role in realizing emissions reductions in the public sector across Europe by facilitating the implementation of projects. Specifically, through its work packages (WP2, WP3, and WP4), the project will conduct gap analyses, create guidelines, catalogues, best practices, and financial schemes. These efforts aim to streamline the tender process and enhance capacity throughout the value chain, contributing to the deployment of energy efficiency and renewable projects in the public sector.

#§COM-PLE-CP§# #§REL-EVA-RE§# #@IMP-ACT-IA@#

2. IMPACT

2.1 Ambition of the impacts

crOSSift will lead to **significant impacts in the four target countries**, particularly in the following ways:

- *Integrated services implemented, operational and tested at the end of the action.*

crOSSfit will adjust and replicate an existing OSS model (successfully run by consortium partner VEB in Flanders) in three pilot countries: Greece, Portugal and Spain, while in addition piloting new financial structures for the allocation of private capital to public renovation projects in Flanders. crOSSfit will thus lead to the creation (and enhancement) of four integrated service models, all being tested within the duration of the action.

- *Strong and trustworthy partnerships with local actors*

In each pilot region the pilot leaders themselves are trustworthy local actors and will be able to utilize an already existing network of partnerships and contacts. For the success of crOSSfit, key importance will be given to the early and continuous involvement of various stakeholder groups (including project developers, ESCOs, financial institutions, professional federations and networks, local and regional authorities and energy agencies). Pilot cases in all countries have already been identified, lowering the threshold of engagement significantly. Nevertheless, particularly in view of post-project upscaling of the services, strong partnerships across regions and countries will be key for sustainable success.

- *Prospect of economically viable business models, in the medium to long-term running without, or substantially reduced the need for public subsidies to cover running costs.*

As part of the sustainability and exploitation work in WP6, all pilot leaders in the different countries will identify pathways for sustainable exploitation of the tested crOSSfit model in their respective territories. An entire work package (WP3) will be dedicated to the design and deployment of innovative financing structures to support the crOSSfit model, thus alleviating the burden on public spending.

- *Increased awareness and trust of end-users through clear accountability, quality assurance and/or dedicated consumer protection mechanisms.*

crOSSfit will base itself on best practices tried and tested in Flanders, for technical and administrative aspects of the one-stop-shop model. Regarding financial and in particular risk-related aspects, crOSSfit will employ the whole suite of SEFA's project finance materials that were developed and successfully deployed in consecutive H2020 actions LAUNCH and PROPEL. These materials comprise a standardized off-balance sheet as-a-Service contract, a Risk Assessment Protocol, an ESG and a KYC module. Accountability, risk mitigation and quality assurance will thus be given key importance to all the crOSSfit pilots.

- *Data and guidance made publicly available in order to facilitate replication of the approach by other market actors. Evidence that the value of the services offered is recognised by the market.*

As an integral part to crOSSfit's exploitation and replication strategy, all crOSSfit collateral will be consolidated by consortium partner SEFA for post-project exploitation. SEFA as a not-for-profit organisation represents an excellent institutionalized solution to further educate market actors and establish more service offerings in other territories across the EU.

	Project end-value:	5 years beyond project end-value:
Number of initial contacts (local authorities) made by the integrated service provider.	32	150
Number of investment projects effectively implemented. (number of housing units/number of public or private tertiary buildings (and floor area)/number of investment projects of private businesses) Belgium Greece Portugal Spain	10 buildings 12 buildings 25 buildings -	1289 buildings 200 buildings 200 buildings 150 buildings
Average conversion rate of initial contacts into effective investments, demonstrating the value of the services offered.	100%	20%
Investments in building energy renovation triggered by the project (cumulative, in million Euro).	52 million Euros	3 billion Euros
Primary energy savings triggered by the project (in GWh/year) – figures provided for Belgium alone.	42.64	5,545
Renewable energy generation triggered by the project (in GWh/year).	60.91	609.1
Reduction of greenhouse gases emissions (in tCO ₂ eq/year) and/or air pollutants.	31,690	2,172,000
Employment – number of jobs created in FTE	260	15'000

2.2 Credibility of the impacts

Credibility of the impacts

Show the steps of your calculations and base yourself on the activities mentioned in your work plan.

Justify and substantiate the baselines, benchmarks and assumptions you used, making reference to relevant publications, studies or statistics.

Try to use the same methodologies for calculating impacts (avoid using different methodologies for each partner, region or country).

The piloting activities in the 4 pilot countries will be comprised of the following:

BELGIUM

Pilot leader VEB has identified 20,000 buildings in the total public municipal housing stock in Flanders. Of these, about 6.45% are estimated to be renovated through newly created crOSSfit financial structures in the 5 years post-project. This would represent about 1289 buildings with a total investment value of 2,34 billion Euros. Within the project duration, a first pilot of 10 buildings (or 18 million Euros) will be undertaken, putting the WP3 innovation and SEFA project finance collateral to work.

GREECE

In Greece, pilot leader SCN has identified 2 municipalities in the Region of the Peloponnese, Messini and Oixalia, to participate in the WP4 pilot. In Messini, 4 schools with a total floor space of 3000 m² will be retrofitted and equipped with rooftop solar PV, representing an investment of 2,84 million Euros. In Oixalia, 8 public building will participate in a virtual net metering scheme with solar PV investments of 210k Euros each.

PORTUGAL

Portuguese pilot leader RdA has identified 2 pilot cases in the Metropolitan Area of Porto and the municipality of Almada. Pilots will involve the installation of 7.5 and 5.25 MWp of rooftop solar PV, with energy communities foreseen as primary off takers. These 2 projects would entail around 14 million Euros of investments triggered.

SPAIN

In Spain, 3 pilot cases have been identified with the following specifications:

- ESCO model rooftop PV for public buildings: estimated installations of 15 MWp of rooftop solar PV, for a total installation cost of 16.5 million Euros.
- Development of small-scale wind and solar parks coupled with energy storage
- Design of heavy mobility charging hubs with renewable energy

For the purpose of calculating the indicators in 2.1 above, only the first pilot case was considered.

Number of initial contacts (households, local authorities, private companies) made by the integrated service provider.

During project lifetime: a total of 7 tenders will be undertaken in the lifetime of crOSSfit, with respective local authorities, and further 25 initial contacts with local authorities are foreseen (5 per each pilot country and 10 across the EU).

Within 5 years of project ending: within the 5 years post-project this number is expected to grow to 150 local authorities, mainly reached through SEFA's EU-wide reach and national replication efforts.

Number of investment projects effectively implemented. (number of housing units/number of public or private tertiary buildings (and floor area)/number of investment projects of private businesses)

During project lifetime: a total of 47 buildings will be included in the pilots in Greece, Belgium and Portugal. In the Greek pilot, the 10 buildings have already been identified, whereas in Belgium and Portugal the implementation sites will be sourced from existing databases from local authorities that are already on board. Spain will implement solar PV projects and implement energy communities as off-takers, with a currently unknown number of buildings involved.

Within 5 years of project ending: In the 5 years post-project, this number is expected to grow exponentially, primarily because of the vast replication potential in Flanders alone (expecting to retrofit 6.45% of their public housing stock – or 1289 buildings. The total conservative estimate would sum up to 1839 buildings across the 4 countries, and potentially many more in new territories.

Average conversion rate of initial contacts into effective investments, demonstrating the value of the services

offered.

During project lifetime: Conversion rates are therefore not very meaningful in this context.

Within 5 years of project ending: Going forward, conversion rates will depend on engagement of local authorities, and it is assumed that 1 out of 5 such local authority would eventually see through the establishment of OSS' in their territories.

Investments in sustainable energy triggered:

crOSSfit builds on an existing network of investors who were instrumental in the development of the SEFA project finance collateral. crOSSfit will start off with a group of more than 20 financial stakeholders (previously engaged in LAUNCH, PROPEL and as SEFA Finance Partners) who have collectively €20+ billion Assets Under Management hereafter AUM, earmarked for investment into sustainable energy projects. During its project lifetime, crOSSfit is estimated to trigger €52m of investment, as a direct result of activities undertaken in WP3 and WP4, engaging investors from the group of SEFA Finance Partners (see letters of support in 3.3 below). This equates to 0.2-0.3% of the total AUM of those investors. Project investments will be a diverse group of as-a-service agreements, project equity investments and comprehensive ESCo projects.

During project lifetime: The assumption of **€52m** direct investments triggered by crOSSfit during its lifetime would mean investments of between €1-5m being triggered in each country for which standardised finance collateral will be available. Indirect investments will certainly also be stimulated by multiplying the business relationships between market players, in a large and expanding market, through capacity building and dissemination activities of the IMPACT project.

Within 5 years of project ending: After the crOSSfit project finishes, the estimation is that **€3 billion** in investments will be triggered as a direct result of crOSSfit activities during the following 5 years of the project. 2.34 billion Euros is expected to be invested in Flanders through VEB alone – with crOSSfit representing the dam-breaking trigger for long overdue investments in the public housing stock. In the other 3 pilot countries we expect to see 100+ million Euros being invested in each and a further 350 million being invested in additional EU MS. This seems completely realistic and actually rather conservative, considering the immense replicability potential in the 3 pilot countries, the continuity of engagement in this effort through SEFA, the AUM of the financial partners involved in this initiative, and the general shift in the financial world, with many sovereign wealth funds and global leaders in asset management “going green” within this decade.

Final Energy Savings

To estimate primary energy savings, a ratio between investment size (in million €) and final energy savings (in GWh) has been applied. Taking the EEFIG DEEP database as a reference, it is estimated that each million € of investment will trigger 1.156 GWh/a of energy savings.[2] This ratio is credible as it corresponds to a very similar ratio of 1.2 GWh/a per m€ that can be found in literature and market benchmarks[3], across different types of end clients and energy efficiency measures, such as thermal installations, lighting and air-conditioning systems. Applying the DEEP ratio of 1,156 to the electricity sector, we see that with a (conservative) average electricity retail price of 0,197 Euro/kWh[4], each million Euros of investment would drive savings of around €227,732 per year, i.e. an average project simple payback of around 4-5 years, which is reasonable to assume in the current market price environment.

During project lifetime: By multiplying the expected investments through crOSSfit earmarked for energy efficiency (18 million in the Belgian pilot), and the ratio of 1.156 GWh/M€, annual energy savings during the project's lifetime are estimated to be **20.8 GWh/a**.

Within 5 years of project ending: the estimate for annual energy savings is more than 100 times that of during the project lifetime, (in line with the prospective retrofit of only 6.45% of Flanders public buildings) reaching primary energy savings of **2,705 GWh per annum**.

Primary Energy Savings:

The energy efficiency measures expected to be implemented are based on the crOSSfit consortium's knowledge and experience from previous LAUNCH and PROPEL H2020 pilots. These measures include, among others, lighting optimisation, more efficient air-conditioning systems, heat pump installations, compressed air improvements, and heat recovery (ventilation). To make estimates, a 70/30 division between electricity and gas savings is assumed here. We also assume a 40% EU generation efficiency electricity on the 70% electricity savings.

During project lifetime: $(70\% * 20.8 \text{ GWh/a} * 2,5 [40\% \text{ efficiency in electricity generation}] + (30\% * 20.8 \text{ GWh/a}) = \mathbf{42.64 \text{ GWh/a}}$

Within 5 years of project ending: the estimate for annual energy savings is more than 100 times that of during the project lifetime (in line with the growth in investments), reaching primary energy savings of **5,545 GWh per annum**.

Renewable Energy generation in GWh/year triggered by the project:

During project lifetime: Applying a factor of 1.1 million € for 1MWp of rooftop solar PV energy generation, and a rather conservative 2000h of effective PV generation per year, €33.5m of investments will trigger **60.9 GWh/a** of renewable energy

generation.

Within 5 years of project ending: the estimate for renewable energy generation is 10 times that of during the project lifetime (in line with the growth in investments), reaching **609 GWh per annum**.

Reduction of greenhouse gas emissions:

For the four crOSSfit target countries Belgium, Greece, Portugal and Spain the population-weighted average standard emission factor is 0,321 tCO₂/MWh^[5] for consumed electricity and 0,202tCO₂/MWh for natural gas combustion ^[6]. Applying the same assumptions as above in terms of technologies used and a 70/30 split between electricity and natural gas, we estimate the following CO₂ savings:

During project lifetime: $(70\% * 20.8\text{GWh/a} * 2,5 \text{ [40\% efficiency in electricity generation]} * 0.321 \text{ tCO}_2/\text{MWh}) + (30\% * 20.8\text{GWh/a} * 0.202 \text{ tCO}_2/\text{MWh}) + (60.9\text{GWh/a [Renewable Energy Generation]} * 2,5 \text{ [40\% efficiency in electricity generation]} * 0.321 \text{ tCO}_2/\text{MWh}) = \mathbf{31,690 \text{ tCO}_2/\text{a}}$

Within 5 years of project ending: $(70\% * 2705\text{GWh/a} * 2,5 \text{ [40\% efficiency in electricity generation]} * 0.321 \text{ tCO}_2/\text{MWh}) + (30\% * 2705\text{GWh/a} * 0.202 \text{ tCO}_2/\text{MWh}) + (609\text{GWh/a [Renewable Energy Generation]} * 2,5 \text{ [40\% efficiency in electricity generation]} * 0.321 \text{ tCO}_2/\text{MWh}) = \mathbf{2,172,000 \text{ tCO}_2/\text{a}}$

Employment – number of jobs created in FTE:

According to literature, on average, “2.65 full-time-equivalent (FTE) jobs are created from \$1million spending in fossil fuels, while that same amount of spending would create 7.49 or 7.72 FTE jobs in renewables or energy efficiency. Thus each \$1 million shifted from brown to green energy will create a net increase of 5 jobs”^[7].

During project lifetime: Based on this calculation and the amount of investment triggered by the crOSSfit project, the employment impact during the crOSSfit project will be a minimum of **260** (5 jobs per million) **new jobs created**.

Within 5 years of project ending: The estimate is that **15'000 new jobs** will be created (5 jobs per €1m, 5 jobs x 3000 = 5'000).

[1] Calculated from DEEP database. See <https://deep.eefig.eu/viewcharts/buildings/>

[2] Calculated from DEEP database, by the weighted average of 5 sectors: hotels/restaurants, offices, health care, education and public buildings. See <https://deep.eefig.eu/viewcharts/buildings/>

[3] Based on our internal calculation to combine some relevant values included in Odyssee-Mure's reports (<http://www.odyssee-mure.eu/>) and in the “Impact Assessment of the Energy Efficiency Directive (2012/27/EU) for the Energy Community”, DecisionWare Group July 2014 (https://www.energy-community.org/portal/page/portal/ENC_HOME/DOCS/3304025/Report_for_web.pdf)

[4] Calculation based on Eurostat data, applying a split of 20% residential and 80% non-residential across the targeted European markets (https://ec.europa.eu/eurostat/statistics-explained/index.php?title=File:Electricity_prices_for_household_consumers,_first_half_2023_23-10-2023.png)

[5] Source: EEA (2022): https://www.eea.europa.eu/data-and-maps/daviz/co2-emission-intensity-12/#tab-chart_2

[6] https://www.ipcc-nggip.iges.or.jp/public/2006gl/pdf/2_Volume2/V2_2_Ch2_Stationary_Combustion.pdf

[7] Heidi Garrett-Peltier (2017) Green versus brown: Comparing the employment impacts of energy efficiency, renewable energy, and fossil fuels using an input-output model <https://www.sciencedirect.com/science/article/pii/S026499931630709X>

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2.3 Sustainability of project results

Sustainability of project results

Describe your strategy to sustain the project's results after the EU funding ends. Consider the following aspects:

- *How will the project impact be ensured and sustained? Which tasks will you carry out during the project to ensure that?*
- *Which parts of the project should be continued or maintained? How will this be achieved and which resources will be necessary?*

By presenting this proposal we are determined to sustain its results in a long term as emphasized in the WP6 – Sustainability, replication and exploitation of the project results. We will build on the achievements of the WP6 whose mission is to establish key pathways for exploitation of the project results, ensuring its long-term success by replication of the OSS model outside the project consortium after the contractual end of crOSSfit. The VEB model is financially independent, not backed by government funding their approach will be explored and replicated in T6.3 in the newly established OSS. Therefore, efforts will be made to create a long-lasting impact to permanently embed the OSS model as a European Gold Standard for the clean energy transition of the buildings, according to the following principles:

1. ‘Energy efficiency first’ as a horizontal guiding principle of the climate and energy governance and beyond, as outlined in the European Green Deal and the EU strategy on Energy System Integration, to make sure we consume the energy we really need;
2. Affordability, making energy-performing and sustainable buildings widely available, in particular for public sector;

3. Decarbonisation and integration of renewables. Building renovation should speed up the integration of renewables in particular from local sources, and promote broader use of waste heat. It should integrate energy systems at local and regional levels helping to decarbonise transport as well as heating and cooling;
4. Life-cycle thinking and circularity.
5. Minimising the footprint of buildings requires resource efficiency and circularity combined with turning parts of the construction sector into a carbon sink, for example through the promotion of green infrastructure and the use of organic building materials that can store carbon, such as sustainably-sourced wood;
6. High health and environmental standards. Ensuring high air quality, good water management, disaster prevention and protection against climate-related hazards, removal of and protection against harmful substances such as asbestos and radon, fire and seismic safety. Furthermore, accessibility should be ensured to achieve equal access for the population, including persons with disabilities and senior citizens.
7. Tackling the twin challenges of the green and digital transitions together. Smart buildings can enable efficient production and use of renewables at house, district or city level.
8. Combined with smart energy distribution systems, they will enable highly efficient and zero-emission buildings.
9. Respect for aesthetics and architectural quality. Renovation must respect design, craftsmanship, heritage and public space conservation principles.

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2.4 Exploitation of project results

Today, only 11% of the EU existing building stock undergoes some level of renovation each year. However, very rarely, renovation works address energy performance of buildings. The weighted annual energy renovation rate is low at some 1%. Across the EU, deep renovations that reduce energy consumption by at least 60% are carried out only in 0.2% of the building stock per year and in some regions, energy renovation rates are virtually absent. At this pace, cutting carbon emissions from the building sector to net-zero would require centuries. It is time to act. Investing in buildings can also inject a much-needed stimulus in the construction ecosystem and the broader economy. Renovation works are labour-intensive, create jobs and investments rooted in often local supply chains, can generate demand for highly energy and resource-efficient equipment and bring long-term value to properties.

We have now a unique chance to make renovation a win-win for climate neutrality and recovery. The EU objective is to at least double the annual energy renovation rate of residential and non-residential buildings by 2030 and to foster deep energy renovations. Mobilising forces at all levels towards these goals will result in 35 million building units renovated by 2030. The increased rate and depth of renovation will have to be maintained also post2030 in order to reach EU-wide climate neutrality by 2050.

To this end, the results of the crOSSfit projects will be widely exploited and replicated. The exploitation of the project results will be conducted in a non-profit manner with wide involvement of stakeholders defined in this proposal. As described in the communication and dissemination activities, we will involve them to raise awareness and build a wide community to ensure the holistic approach becomes a gold standard on the public real estate market. The tangible and measurable results will be exploited beyond the duration of the project to durably reduce complexity, simplify decision making process and stimulate demand for investments in energy performance and decarbonisation as well as to connect all relevant actors in the value chain. Furthermore, through the widely adopted OSS model, access to various support measures will be streamlined together with methods and support for integrated services comprising the OSS.

crOSSfit presents vast exploitation potential for all partners involved, and specific work to this end will be carried out in Tasks 6.3 and 6.4. Below table indicates a first set of exploitable results per each crOSSfit consortium partner.

Partner	Exploitable results
JAE	Project development potential between building owner and operators, project developers and financial funds leading to enhanced service offerings, Market and regulatory insights informing further research and collaboration
ESC	Project development potential between building owner and operators, project developers and financial funds leading to enhanced service offerings, Market and regulatory insights informing further research and collaboration
VEB	Innovative financing structures for the steep uptake of retrofits across 1000+ buildings in Flanders
SEFA	Spreading the OSS model across Europe, thought leadership and retention of key collateral, potential new membership
RDA	OSS model to further exploit in pilot regions, thought leadership on replicating pilots in Portugal
SCN	OSS model to further exploit in pilot regions, thought leadership on replicating pilots in Greece
ENER	OSS model to further exploit in pilot regions, thought leadership on replicating pilots in Spain



2.5 Catalytic potential: Replication and upscaling

The main advantage of crOSSfit that sets it apart from other project-based initiatives in the sustainable energy financing space, is that there is an organisation that is established and ready to take the results, replicate the success of applying verified and validated trainings, approaches and standardised collateral, and scale up activities beyond the life of the project. SEFA, as an independent, not-for-profit association is perfectly positioned to take such a role, in particular replicating and scaling the crOSSfit results from WP3 and WP4.

Replication of crOSSfit OSS models will take place on 2 levels:

- On a national level, each pilot country will hold specific expansion and replication roundtables as described in Tasks 7.4, 7.5 and 7.6.

On a European level, SEFA will act as the center of competence to replicate crOSSfit models in further EU MS', as described in T6.4. crOSSfit employs a 3-tiered geographical approach to implementation of its capacity building, project processing, and associated communications, outreach and dissemination efforts. The efforts to intensify engagement in acceleration countries will lead to replication and scaling up of the use of standardised financing collateral by energy service suppliers and financiers in those countries. The efforts in the pilot countries will enable the replication of a verified and validated approach (previously tried and tested in Flanders) to capacity building and sustainable energy project processing. The efforts to develop partnerships and networks in new countries (based on new letters of support and commitment from new stakeholders to engage with crOSSfit and SEFA) will enable upscaling of activities and impact beyond the geographic focus and the lifetime of the crOSSfit project. Letters of support from Hungary and also the Riga Planning Region have been received, already showing interest in the adoption of the crOSSfit model in further pilots in new countries.

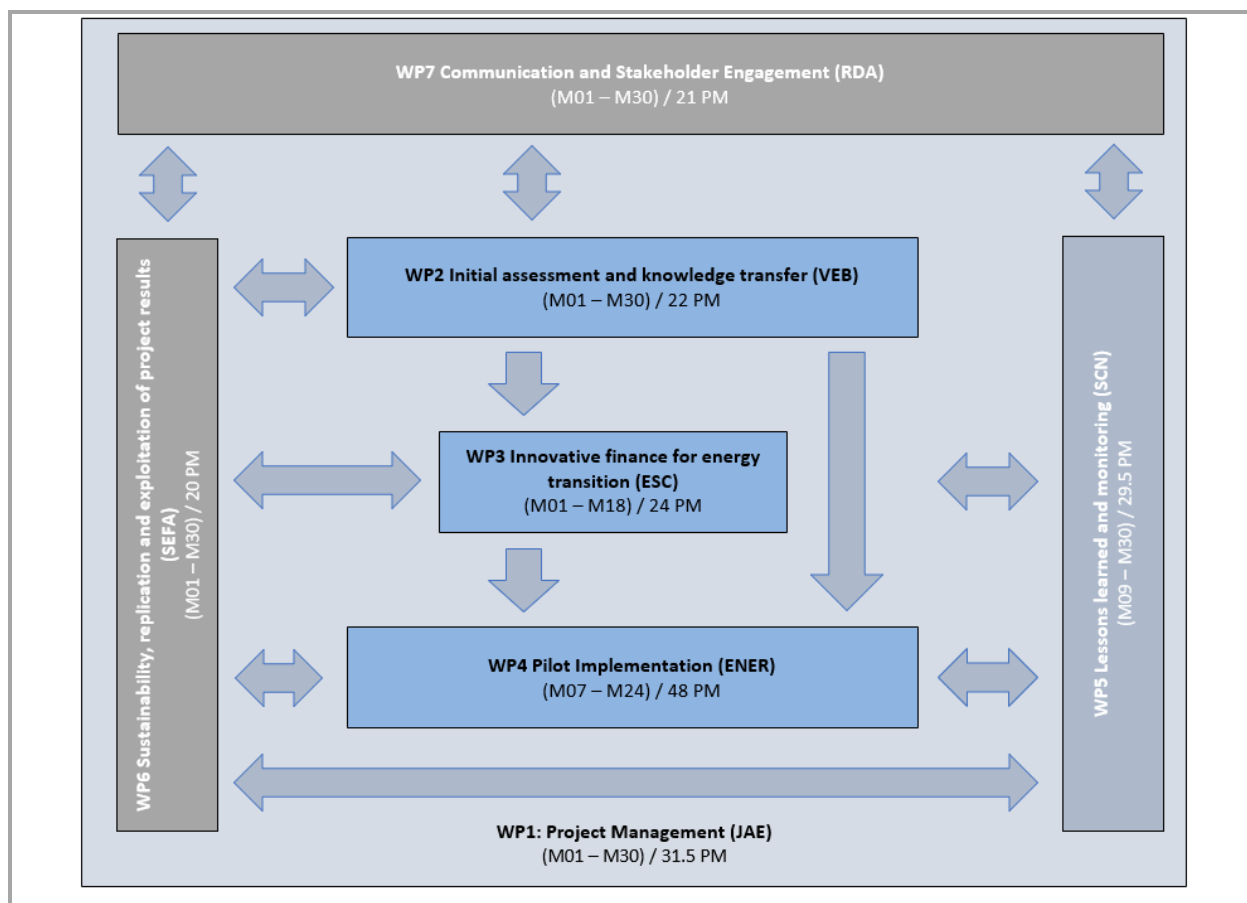
crOSSfit will also work together with existing and new channel partners to catalyse growth in the take-up of the standardised collateral that has been developed and ensure that during and after the project these channel partners are well-equipped (with access to the IT platform, and requisite knowledge and understanding of the collateral) to replicate trainings in their respective national/regional jurisdictions.

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3. IMPLEMENTATION

3.1 Work plan

crOSSfit consists of 7 work packages, most of which will start in the first month of the project. Two work packages prepare the crOSSfit model and the 4 respective pilots (WPs 2 & 3). The work in those WPs will produce a foundation for the rollout of the pilots by M12. WP3 will be kept "open" until the end of the project, allowing for further refinements and deployment of the financial structures. WP4 will take place in 3 pilot regions in parallel. Meanwhile, WP5 will monitor progress and prepare lessons learned. crOSSfit project work and results will be disseminated through WP6 and all of the outputs from WPs 2 to 5 will be exploited through WP6 activities, with SEFA as the key exploitation route. WP7 activities will start as early as possible and the communication work is organised in a number of dedicated stakeholder engagement activities and focus groups, contributing to the success of WPs 2, 4 and 5 in particular. Messaging and communication collateral developed in WP7 will also strongly support dissemination activities in WP6.



3.2 Stakeholder input and engagement

The crOSSfit partners have significant experience in running and managing communication campaigns, as well as establishing new entities, and are confident they will achieve success. The partners have the opportunity to build upon all the contacts and interactions following the LAUNCH and PROPEL Horizon 2020 funded projects and will continue to engage these Stakeholder Communities. The crOSSfit consortium starts with an existing pool of more than 800 stakeholders across Europe in the sustainable energy sector created over recent years. The project's success will rely heavily on the engagement of, and uptake by, public authorities, EE project developers, investors, asset owners and property managers, and the consortium has received a total of 57 letters of support from such stakeholders (see further details in table 5 below).

During previous European Commission funded projects, multiple ESCo associations and other H2020 projects have reached out to engage with the project partners and feedback has been collected from market practitioners about the crOSSfit concept (see Tables 4 for a full list of cooperating and collaborating associations and EU projects). Due to the fact that the communication and dissemination activities can be implemented from very early in the project, the crOSSfit project can count not only on a broad stakeholder group, but also on several partners in the European energy industry willing to closely support the project. The potential reach for crOSSfit dissemination activities is Europe-wide, and each crOSSfit partner will leverage these connections to maximise the reach and impact of the project.

The project will conduct its communications and dissemination through the Sustainable Energy Finance Association (SEFA). The involvement of SEFA ensures a consistent branding and messaging, and allows crOSSfit to utilise existing digital marketing channels of SEFA (see further details in 3.5 below). This will ensure the market uptake and the dissemination of the materials developed by the project to the wider market.

Table 4: List of key stakeholders for the implementation of crOSSfit

Key Stakehol	Description	WP releva
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ders		nce		
Regional and local authorities	Public entities are the key stakeholder in the crOSSfit project with a dual role as public building and infrastructure owner and OSS implementation partners. The crOSSfit partners have actively engaged and grown reach within this stakeholder group.	WP2, WP4, WP5, WP6, WP7		
Financial market actors	Financial market actors include both private and public financial institutions, providing debt and/equity finance, crowdfunding platform, public funded sources either actively investing or seeking to invest in sustainable energy projects.	WP3 WP4,		
EE Project Developers	EE Project Developers are important stakeholders, including Energy Service Companies (ESCO's), project developers, engineering companies, aggregators, retailers, and technology providers, with an emphasis on ESCos. The crOSSfit partners have actively engaged and grown this network over the past several years.	WP4, WP5, WP7		
Associations and interest groups	Associations and other interest groups such as BelESCO (The Belgian ESCo Association), Société Fédérale de Participations et d'Investissement (SFPIM), Romanian Green Building Council, the Hungarian Entrepreneur and ESCO Platform, Association of Spanish Agencies for Energy Management (EnerAgen), APESE (The Portuguese Association of Energy Service Companies), IGBC (Irish Green Building Council), REHVA: Federation of European Heating, Ventilation and Air-conditioning Associations, INZEB, Heat pump association and Som Energia have signed letters of support. A few on the above entities have been involved in the LAUNCH and/or PROPEL projects as multipliers. During crOSSfit, the engagement of these groups will be renewed and enriched with new local and national group associations that cover an important role in the market.	WP7		
Other industry stakeholders	The consortium also will reach out to other industry stakeholders through its very large contact database of more than 6,000 contacts in the sustainable energy sector in Europe. These include programme implementers, technology providers, architects, consultancy firms, legal councils, energy agencies and research institutions. outreach coordinators and transaction counterparties, which are interested in the results of crOSSfit.			
Other European projects	The consortium partners also had numerous interactions, collaborations and conversations through LAUNCH and PROPEL with 18 European projects with which the consortium will look to extend collaborations for crOSSfit. These projects are:			
	ENERGATE	SENSEI	PEER	FOSSTER
	SMARTER	Innoveas	GEAR@SME	LIFE BE FREE
	SEIFA	European Innovation Partnership on Smart Cities and Communities (EIP-SCC)	FinEERGo-Dom	BungEES
	SURE2050	EN-TRACK	REFINE	EUROPA
	ESI Europe	EAAS		

crOSSfit will rely on a broad and deep engagement of the stakeholder groups state in Table 4. The consortium is confident to attract the required number and types of stakeholders for successful implementation of all the WPs. Table 5 below outlines the specific levels of engagement already formalized with stakeholders, and their respective roles in and contribution to the project.

Table 5: List of stakeholders and their respective role in crOSSfit

Stakeholder/Organisation	Cat.	Role in the delivery of project objectives
Public stakeholders: Diputació Barcelona, Municipality of Chalki, Municipality of Aigialeia, Municipality of Oichalia, NASUVINSA, Municipality of Thermo, Municipality of Tripoli, Municipality of Almada, Flanders Chancellery and Foreign Office, Riga Planning Region, AdEPorto, Mayor Camara Municipal des Guimares, Municipality of Messina	S	Several public stakeholders from local authorities to regional ones have signed letters of support for crOSSfit (particularly in the piloting countries). Some of the ones that signed the letters will be involved directly as piloting entities in their respective countries in WP4 and others will be involved in WP5 (capacity building and lessons learned) and WP7 round tables.
ESCOs: GreenEsco, Econoler (SuperESCO), Eneergeniring, Lumensteam, New Energy Group, NuEnergyTek Limited, Factor4, EUDITI, Via Europa, Stirixis Techniki SA	S	Several ESCo companies with focus in the pilot countries have signed letters of support and will contribute to the outcome of WP4 (as potential future bidders) are interested in the results of crOSSfit (WP7).

Financiers: Invesis, Solas Capital, GNE Finance, Concorde MB partners (CMBP), Fundeen Platform, Findustrial, Institutional Banking Catalunyan Manager, La Société Fédérale de Participations et d'Investissement (SFPIIM), Tokeportal, Green Finance Institute (Spain), Banco Bilbao Vizcaya Argentaria	S	Several investors have signed letters of support for crOSSfit, some of which have joined SEFA already as Finance Partners in 2022. These investors know in detail the market barriers in the deployment of capital in the EE projects and deep renovation in the public sector and would like to contribute to the outcome of crOSSfit (WP3 and WP4).
Other national and European associations: BelESCO (The Belgian ESCo Association), Société Fédérale de Participations et d'Investissement (SFPIIM), Romanian Green Building Council, the Hungarian Entrepreneur and ESCO Platform, Association of Spanish Agencies for Energy Management (EnerAgen), APESE (The Portuguese Association of Energy Service Companies), IGBC (Irish Green Building Council), REHVA, INZEB, European Heat Pump Association (EHPA) and Som Energia.	S	Through prior work in LAUNCH and PROPEL, as well as through membership of individual consortium members, there is a large group of national and European associations that will be engaged in through joint education and dissemination activities (WP7).
Other stakeholders relevant for the project: Research institutions: National Technical University of Athens (EPU-NTUA), Technology providers such as: Eaton, Elbis, Green Hydrogen solutions (GHS) and Premium, Consultancy companies in energy audit, 'as a service': Advancing Building and Urban Design (ABUD), LDK, LPC Delta, Halstead consultancy, GrowthBeam and Crehan, Kusano & Associates (CKA).	S	Several other stakeholders such as research institutions, consultancies, and technology providers have signed letters of support as the results of crOSSfit are of interest to them and will be shared via WP7 by SEFA. Further relevant stakeholders will be reached via SEFA's network of above over 500 active contacts.

Categories: **S** – signed a letter of support, **E** – is engaged through crOSSfit partners and/or SEFA

3.3 Timetable

ACTIVITY	YEAR 1				YEAR 2				YEAR 3	
	M 1	M 4	M 7	M 10	M 13	M 16	M 19	M 22	M 25	M 28
WP1 – Project Management										
Task 1.1 - Setup of project management and data access policies										
Task 1.2 - Day-to-day project management										
Task 1.3 - Project reporting										
Task 1.4 - Evaluation of project KPIs and quantified impacts										
Task 1.5 - IPR management										
Task 1.6 – Advisory Board setup and management										
Task 1.7 - Common information and dissemination activities										
WP2 – Data collection, knowledge transfer and OSS roadmap										
Task 2.1 - Initial assessment, data collection plan and gap analysis										
Task 2.2 - Key success factors identification and OSS roadmap development per pilot										
Task 2.3 - Analysis of the Legal and Regulatory Framework at each piloting Member state										
Task 2.4 - Technical tendering catalogue (Blueprint on OSS model, guidelines and templates)										
WP3 – Innovative finance for energy transition										
Task 3.1 - State of the art of current funding and financing opportunities										
Task 3.2 - Financial Institutional Stakeholder engagement for financing tools/project identification										
Task 3.3 - Create a funding mechanisms catalogue										
Task 3.4 - Financial engineering- innovative private driven financing mechanisms development										
WP4 – Pilot Implementation										
Task 4.1 - Projects definition with the piloting entities via co-creation methods										
Task 4.2 - Awarding criteria and process										
Task 4.3 - Implementing the tender process in Spain across various pipelines										
Task 4.4 - Implementing the tender process in Greece across various pipelines										
Task 4.5 - Implementing the tender process in Portugal across various pipelines										
Task 4.6 - VEB pilot testing: Validating and Refining Solutions										
WP5 – Capacity building, Lessons learned and monitoring										
Task 5.1 - Monitoring and impact assessment of pilots										
Task 5.2 - Capacity building and Lessons learnt from the piloting phase Spain										

Task 5.3 - Capacity Building and Lessons learnt from the piloting phase Greece											
Task 5.4 - Capacity building and Lessons learnt from the piloting phase Portugal											
Task 5.5 - Lessons learned via the VEB pilots testing: validation and refining solutions											
WP6 – Sustainability, replication and exploitation of project results											
Task 6.1 - Develop dissemination, replication and exploitation plan											
Task 6.2 - Delivering dissemination activities and events											
Task 6.3 - Establishment of regional/national OSS offering in Spain for post-project exploitation											
Task 6.4 - Establishment of regional/national OSS offering in Greece for post-project exploitation											
Task 6.5 - Establishment of regional/national OSS offering in Portugal for post-project exploitation											
Task 6.6 - Consolidation of the crOSSfit collateral for further replication through SEFA											
WP7 – Communication and Stakeholder Engagement											
Task 7.1 - Communication and outreach plan, incl. branding											
Task 7.2 - Stakeholder mapping											
Task 7.3 - Capacity Building and training programme outside of the project beneficiaries											
Task 7.4 - Expansion and engagement of Spanish findings via round tables for Spanish regional governments											
Task 7.5 - Expansion and engagement of Greek findings via round tables for Greek regional governments											
Task 7.5 - Expansion and engagement of Portuguese findings via round tables for Portuguese local authorities											

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Categories: **S** – signed a letter of support, **E** – is engaged through crOSSfit partners and/or SEFA

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3.4 Impact monitoring and reporting

crOSSfit has defined 11 project KPIs related to its 4 key objectives (in section 1.3), as well as quantified impacts for 8 indicators (in section 2.1). Impact monitoring, evaluation and reporting will take place in multiple ways:

- Each WP leader in charge of a specific project KPI will monitor progress, impact and (non-)achievement of KPIs in their respective areas of responsibility. Monthly crOSSfit Steering Committee calls will address progress against these KPIs as a standing agenda item.
- Formally, 2 reports on project impacts will be submitted in M09 and M30 respectively as part of Task 1.4 (in the form of Deliverables D1.3 and D1.4).

The project will deliver the mandatory and internal reporting:

- Regular internal reporting for semi-annual review by Steering Committee – will be carried out to provide the consortium information on the progress in implementation of the project;
- Mandatory interim reports to Contracting Authority – will be prepared to provide feedback to Contracting Authority on the implementation of the project and results achieved so far;
- Final Report and Product-oriented Report – will be prepared to provide detailed description of the deliverables and on materialisation of the work plan.

The reporting to the Agency will be the responsibility of the coordinator (JAE), while the partners are obliged to provide the necessary cooperation and documentation for the accurate and timely reporting.

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3.5 Communication, dissemination and visibility

The project dissemination will target all key audiences in the sustainable energy financing value chain. In WP6, the Dissemination, Replication and Exploitation Plan (DREP) will build the foundation of all the cooperation and engagement routes for the key market players, national and European networks. All partners will carry out stakeholder mapping which will provide the basis for outreach and dissemination activities through different channels and in different countries. WP7 will prepare the appropriate general and targeted messaging, and communication collateral to be deployed in WP6. Primary target audiences are closely aligned with the key stakeholder groups outlined in section 3.5 above. Table 6 below illustrates the appropriate channels of dissemination and interaction with the primary target audiences.

Table 6: Matrix of communication tools with primary target audiences

Communication tools	Primary target audiences				
	Regional and local authorities	EE project developers	Financial market actors	Associations and interest groups	Other industry stakeholders, wider public
Project visual identity	✓	✓	✓	✓	✓
Press conferences, press releases	✓	✓	✓	✓	✓
PR campaigns	✓	✓			✓
Event package	✓	✓	✓		✓
Project web site and partners web sites	✓	✓	✓	✓	✓
Project newsletter	✓	✓	✓		✓
Social networks (project pages & accts.)	✓	✓			✓
Social networks (partners' pages & accts.)	✓	✓			✓
Targeted interviews and articles	✓	✓	✓	✓	
Project brochures and leaflets	✓			✓	
Professional publications				✓	
Bespoke e-mails	✓	✓	✓	✓	
Individual meetings and bilateral calls	✓	✓	✓	✓	
Presentation at targeted conferences	✓	✓	✓	✓	
Representation at industry events/exhibitions	✓	✓	✓	✓	✓
crOSSfit's print, audio, and visual productions	✓	✓			✓

A key dissemination route will be the participation of all crOSSfit partners at key industry events and conferences. Table 7 below lists 20+ events, most of which are organised on a yearly basis, and will likely attract a combined total attendance in excess of 150'000 participants. crOSSfit partners will attend these events to engage stakeholders in the project work and disseminate project results, where appropriate via the means of speaking slots and exhibition booths. Travel and event

participation budget is foreseen to support these efforts.

Table 7: Preliminary event calendar for 2024 to 2026

Event/Network	Participation type	Exp. nr. of participants
The International Annual Conference on energy poverty 2025 & 2026	Attending / Speaking	350
European Energy Efficiency Conference 2025 & 2026	Attending	800
MIPIM 2025 & 2026	Attending / Speaking	12'000
World Sustainable Energy Days 2025 & 2026	Attending / Speaking	2'500
Smart Cities Marketplace Forum 2025 & 2026	Attending / Speaking	300
Sustainable Investment Forum 2025 & 2026	Attending	800
Energy Storage World Forum 2025 & 2026	Attending	10'000
EU Green Week 2025 & 2026	Attending	1'500
Annual Global Conference on Energy Efficiency 2025 & 2026	Attending	1'500
Spark 2025 & 2026	Attending	2'500
FLEXCON 2025 & 2026	Attending	8'000
MCE MOSTRA CONVEGNO EXPOCOMFORT 2025 & 2026	Attending	25'000
Sustainable Places 2025 & 2026	Attending / Speaking	1'500
European Sustainable Development Week 2025 & 2026	Attending	1'500
EU Sustainable Energy Week (EUSEW) 2025 & 2026	Attending / Speaking	2'500
AEE Europe 2025 & 2026	Booth	8'000
Smart City Expo World Congress 2025 & 2026	Attending/Speaking	20'000
European Finance Summit 2025 & 2026	Attending	2'000
European Financial Services Conference 2025 & 2026	Attending	800
JRC ESCo Conference 2025 & 2026	Attending / Speaking	300
Covenant of Mayors Investment Forum 2025 & 2026	Attending/ Speaking/Booth	1'000
ENLIT 2025 & 2026	Attending/Speaking	25'000

Online presence and digital marketing

The project web site will be operational from M06, with partners including the links and project information on their websites at the same time. The project website will be used exclusively for the general project information and accessing the (published) project Deliverables. The main online presence and digital marketing channels will be contributed by SEFA, where e.g. the existing SEFA website already sees several hundred page visitors per month. The SEFA mailing list comprises close to 500 recipients, and SEFA's social media presence on Twitter and LinkedIn has 1200+ followers with the numbers expected to be rapidly growing with webpage visitor numbers expected to reach 15'000 per year, and social media followers to grow to 5'000 within cROSSfit's duration.

Data management and IPR management

The consortium will fulfil the open access requirements of LIFE as per the Grant Agreement. Data management will be covered by the Consortium Agreement to be signed by all consortium members, based on the DESCA model (Development of a Simplified Consortium Agreement). All public deliverables will be available on the project website.

Individual commercial data on prices, production volumes and technical specifications affecting the market competition will not be published and no access will be given to such data even to partners to comply with the EU competition law. The relevant EU statistical rules will be observed, for example, to avoid that individual data could be derived from aggregated data. The data will be accessible for verification and re-use as they will remain available on the project web site at least 5 years after the project is ended, and they will be in a format which allows their re-use and comparison. To ensure comparability, validation, reliability for use in the project and by other interested parties, Common European Research Information Format (CERIF), which is data standard recommended by the EU.

The consortium will conclude a consortium agreement based on Horizon 2020 recommended formats that will also include issues of IPR (prevailing form of IP protection will be copyright and utility model), including agreement on the background and their management. The consortium will also address access of partners to the background, including necessary access for exploitation of the project's results that may go beyond expiry of the project.

Visibility of EU funding

In compliance with the Grant Agreement, **any communication activity** related to the project action (including in electronic form, via social media, etc.) and any infrastructure, equipment and major results funded by the grant **must display the EU emblem AND include the following text:**

For communication activities:

EN Version:	"This project has received funding from the European Union's LIFE programme under grant agreement No XXX – crOSSfit".
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For infrastructure, equipment and major results:

EN Version:	"This [infrastructure/equipment/type of result] is part of a project that has received funding from the European Union's LIFE programme under grant agreement No XXX – crOSSfit".
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Any communication activity related to the action must indicate that it reflects only the author's view and that the Agency is not responsible for any use that may be made of the information it contains.

EN Version:	"This deliverable reflects only the author's view. The Agency is not responsible for any use that may be made of the information it contains".
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When displayed together with another logo, the EU emblem must have appropriate prominence. The EU Logo/Emblem and its use must follow the Design manual:

Logo	https://european-union.europa.eu/principles-countries-history/symbols_en
Design manual:	http://publications.europa.eu/code/en/en-5000100.htm

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4. RESOURCES

4.1 Consortium set-up

The consortium is composed of seven partners, each with in-depth and complementary experience in the sustainable energy finance sector. For additional information about consortium partners, please see Annex "Participant Information".

Participant name	Expertise and competencies	Main tasks in crOSSfit
Joule Assets Europe	JAE's core commercial focus is matching EE projects to appropriate sources of finance. As such, the company's core focus is overcoming the gap between funds and project developers. Core competences include: an excellent knowledge of the market, a relationship of trust with a wide range of key players such as financial funds and developers and detailed knowledge of the key areas of concern for both parties.	JAE will act as the external project coordinator, in charge of the communication with and reporting to the EC. JAE will also be responsible for the overall financial management of the project. JAE will be leading WP1, is a task leader in WP3 and will contribute to all WP throughout the entire project.
EnerSave Capital	ESC has been set up by a team of Pan-European financiers to provide sustainable (ESG) based financial services to companies engaged in EE type assets with the objective of creating EE based cash flows which can be securitized under Luxembourg law, into financial products meeting the needs of institutional investors. The partners have helped to transition other types of project finance based cash flows into tradable securities, they therefore understand and are highly dedicated and personally invested in helping the EE market to advance.	ESC will be responsible for WP3 Innovative finance for energy transition and will be also involved substantially in WP2 and WP4 in the pilots in each of the 3 countries and will contribute throughout the rest of the work packages.
Vlaams Energiebedrijf (VEB)	Vlaams Energiebedrijf (https://www.veb.be/) is a central purchasing body for the energy supply and energy efficiency challenges of the public sector in Flanders. VEB supports government organisations with the strategy, planning and execution on gas/electricity related projects, energy savings and renewable energy generation. VEB acts as a knowledge center in guiding these public entities towards the ambitious climate objective of becoming carbon neutral by 2050. To that end, VEB's actively deploys its Terra energy and patrimony database and develops several framework agreements, unburdening the public entities in their need to design individual procurement tendering procedures.	VEB will be responsible for the knowledge transfer in WP2 and will actively contribute in WP3 in developing an innovative financing mechanism. In the rest of the work packages, VEB is involved as a critical sparring partner and reviewer of the pilots as well.
Sustainable Energy	The Sustainable Energy Finance Association (SEFA) is the European trade association for the sustainable energy	SEFA will be responsible for leading WP6 Sustainability, replication and exploitation



Finance Association (SEFA)	industry. SEFA's focus is sustainable energy, which encompasses both energy efficiency and renewable energies, as the keystone of our vision of a carbon-neutral economy. SEFA is a non-for-profit entity that is the fruit of a series of projects funded under the Horizon 2020 programme over the past seven years. Building on this legacy, SEFA's founding members have acquired considerable expertise in raising private finance for energy projects, thus gaining credibility with financiers and asset owners.	of project results and is also leading tasks in WP7 and WP3. SEFA will contribute throughout the rest of the work packages.
RdA Climate Solutions	RdA is an advisory boutique specialised in climate change mitigation and adaptation strategies. The team includes world-class experts in climate change, energy transition and sustainable finance supported by relevant international experience. With deep market knowledge and track record, RdA partner with clients to provide bold, integrated, and independent solutions to address their business challenges with low-carbon and climate resilient solutions. Clients include SMEs and multinationals, financial institutions, and public entities such as cities and central governments across Europe.	RdA will be responsible for the Portuguese pilots. RdA will be leading WP7, on communication and outreach activities.
Sustainable City Network	The "Sustainable City" City Network (https://www.sustainable-city.gr/en.html) is a non-profit organization providing technical support to Municipalities. It facilitates proposal submissions to European Programs, focusing on Sustainable Development, Environmental Protection, Circular Economy, and Eco-innovation. The network aims to foster cooperation among its members through scientific research, technical support in proposal design, and the implementation of innovative programs.	Sustainable City will lead the Greek Pilot and will assist in the deployment of the tender process in Greece in different pipelines. SCN will also lead WP5, on Capacity building, Lessons learned and monitoring.
L'Energetica	ENER focuses on renewable energy projects, aiming to generate 100% of the Catalan Government's energy needs. The team, comprising skilled engineers, project managers, energy lawyers, and administrative staff, contributes to efficient project execution.	ENER aims to utilize its team's expertise and further acquire knowledge on energy efficiency sector. ENER will lead WP4 Pilot implementation and will contribute to all WP throughout the entire project.

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4.2 Project management

Consortium project management structure

The project partners have agreed to implement a project management structure as depicted below, which will be further detailed in the Consortium Agreement.

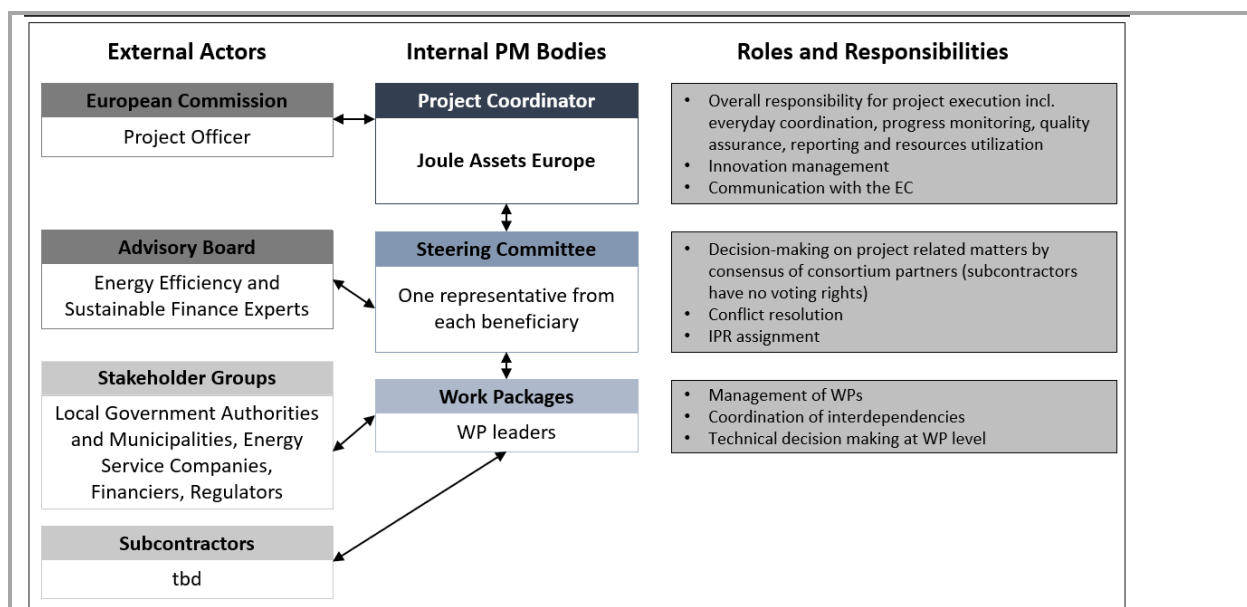


Figure 4: Consortium Project Management Structure

Joule Assets will act as the project coordinator including progress monitoring, quality assurance and consortium coordination. and, maintain responsibility for reporting on project progress to the European Commission's Project Officer.

Decision-making

All decisions will be taken by a qualified majority (three-fifths) and one vote per partner as part of the crOSSfit Steering Committee. This Committee will consist of a senior participant from each consortium partner and will meet online or in person at least once per month. At least one attendee from each consortium partner required to be in attendance at these meetings.

The Stakeholder Group will be integrated via four joint workshops, interviews and by providing user feedback on crOSSfit. Subcontractors have no voting rights in this Group but will be heard.

Internal project coordination

Efficient project communication will be assured via the crOSSfit Steering Committee group meetings, regular monthly conference calls (which will include the wider group of project contributors from the consortium partners), as well as through regular email exchange and semi-annual in-person project meetings.

As the project partners and subcontractors are located in different countries, information management will be undertaken through a secure online collaboration platform that will ensure universal access to project information, including working documents and supporting material. The platform is located on an easy-to-use web front-end (Microsoft Sharepoint, hosted on the secure JAE portal). Internal communication for this project will be in English.

Quality, monitoring, planning and implementation control

The quality of project deliverables will be maintained through thorough internal review procedures prior to the dissemination of final deliverables to external stakeholders. The crOSSfit Steering Committee will be responsible for the final review of any external communication or deliverable, and this oversight will ensure that all consortium partners have the opportunity to review communication material and deliverables prior to dissemination.

Internal project planning, monitoring and implementation will be the responsibility of JAE. JAE brings senior project management expertise to this role, and demonstrated competence in project planning, monitoring and implementation during the project management of the SEAF, LAUNCH and PROPEL projects.

4.3 Green management

Travel

While the consortium partners are based in different countries across Europe, face-to-face meetings will be limited to twice-yearly, with regular meetings held online using videoconferencing. This will reduce the travel-related environmental impact of the project. When travel is required, travel by train, public transport will be selected over travel by air wherever practical. In addition, outreach with stakeholders will take place for the most part online using videoconferencing, and travel to meet with

stakeholders and to conferences will be limited to opportunities deemed necessary for the successful implementation of the project.

Green procurement and CSR

Joule Assets Europe, as the project coordinator and primarily responsible for procurement, is committed to the principles of sustainable procurement, where environmental, social (food waste) and economic impacts of purchasing are all taken into account in procurement decisions.

Resources

As all material for the project will be available to consortium partners online, printing will be kept to a minimum.

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5. MEMBERS OF THE CONSORTIUM

5.1 Joule Assets Europe

Legal name (short name):	Joule Assets Europe srl (JAE)
DESCRIPTION OF PARTICIPANT	
<p>The European energy efficiency markets have lagged due to high due diligence costs blocking access to capital and complicating project finance. To address this market failure, Joule Assets Europe provides financing solutions and strategic support for Energy Reduction Assets, including energy efficiency, distributed renewables, storage, and building control measures. Joule's online platform, eQuad, provides third-party project valuation, performance insurance, project certification, due diligence, and introductions to prequalified capital sources in the form of off-balance sheet financing. Joule helps energy service companies (ESCOs), engineering firms, and construction companies across Europe access appropriate investment for their energy efficiency and renewable energy projects. Joule introduces investors to opportunities in the form of already vetted viable projects according to their own investment criteria. Joule Assets team develops Joule's business opportunities in Europe, building an investment pipeline and actively engaging the energy efficiency industry in their deployment of innovative financing solutions.</p> <p>Joule Assets has developed and commercially launched eQuad, a Software-as-a-Service web application that supports Sustainable Energy Assets (SEA) investments through providing standardised project descriptions to investors, automated insurance quotations for small projects and a hand-shake service with appropriate investors. The eQuad platform therefore simplifies the complex process of matchmaking project owners and developers with investors, of all kinds, interested in funding SEA projects. Projects submitted to the eQuad platform are evaluated through a series of forms designed to extract the key technical and financial information from each project. The platform also includes a robust document management system used to support technical and financial due diligence, as well as optional modules which provide access to performance insurance (through a partnership with HSB Engineering Insurance Ltd.) and certification (through partnerships with Investor Confidence Project (ICP) verified companies). eQuad projects can be sent to interested investors by Joule Assets, either as individual projects or as portfolios (bundles) of smaller projects, which allows the projects to reach a critical size threshold and satisfy investor requirements.</p> <p>Main tasks / role in the project</p> <p>JAE will coordinate administrative, technical and financial aspects of the project, and will be the work package leader of WP1, coordinate work between partners, and communicate with the European Commission.</p>	
KEY STAFF	
<p>Michael PACHLATKO, male, CFO & European Director</p> <p>Michael is leading Joule's operations in Europe. In his role, he oversees Joule's research and analysis work and manages its European research projects. He is also in charge of the eQuad due diligence process, enabling the match-making of project developers and investors.</p> <p>He graduated from the University of Basel, Switzerland, with an MA in Sociology, Sustainable Development and Philosophy. Prior to joining Joule, he held positions at the German Marshall Fund (GMF) and WindEurope (former EWEA) in Brussels.</p> <p>Eddie STRENG, male, Business Development Officer</p>	

Eddie's key areas lie in managing business relationships, market research and project management at Joule Assets Europe. Eddie is also responsible for the development and maintenance of the eQuad and SEFA platforms as well as the advancement of several projects in Europe, including in the UK.

Eddie holds a Bachelor's degree in Business Administration and has had extensive experience in the construction industry throughout his career thus far.

Telvin KULECHO, male, Sales and Communication Officer

Telvin provides business development support to senior management and to driving sales efforts in establishing and growing membership base for SEFA, the Sustainable Energy Finance Association created in the framework of the PROPEL project under Horizon 2020.

Telvin's experience has focused primarily on business development, customer relationship management and sales in technology and hospitality industries.

Telvin holds an MSc in Strategic Business Development, from the University of Vaasa in Finland.

Imen GUENICHE, female, Policy Officer

Imen's work covers research, and development of consultancy reports. She also provides monitoring and analysis of European policies and collaborates with other organizations on European initiatives.

Imen holds a master's degree in European Interdisciplinary Studies (major Public Affairs and European Policies) from the College of Europe and a master's degree in accounting.

PROJECTS OR ACTIVITIES

1) PROPEL (2021-2023): kicked off in June 2021, PROPEL is a 2.5-year EU-funded project aimed at creating an end-to-end service package to develop, sell, contract and finance energy efficiency initiatives at scale as well as the development of an ecosystem to support the advancement of sustainable energy finance under the framework of a new association created in the project, the Sustainable Energy Finance Association (SEFA). This includes the standardised materials developed previously in the LAUNCH project and those developed under PROPEL - the loan application and KYC guidelines, ESG module for loan applications and standardised contact signature authentication. This package is being applied by the full value chain of energy efficiency market players via PROPEL's Capacity Building Programme, which has been acting as a conduit for a greater uptake of solutions to enable market growth.

JAE is leading the PROPEL H2020 consortium. Expected project outcomes include a new integrated ecosystem of energy efficiency project finance tools, such as the standardised materials developed in LAUNCH and PROPEL - more specifically under the umbrella of SEFA and to be housed in SEFA's digital platform that is being integrated with the eQuad platform so as to facilitate better access for future members and interested parties. The set-up of SEFA as THE main centre of knowledge and competence for sustainable energy in Europe is a key outcome of PROPEL in helping to ensure that the project's outcomes are sustained beyond its lifetime.

2) LAUNCH (2019-2021): running from May 2019 to October 2021, LAUNCH developed and piloted standardized processes required by both investors and project contractors to evaluate projects as investment opportunity, in an effort to enable the aggregation and securitization of small projects and the creation of more robust pipelines. Joule Assets Europe, seeking to facilitate financial investment in smaller sustainability projects, lead the LAUNCH H2020 consortium. Project outcomes included standardized, investment-grade Energy Performance Contracts (EPCs) and Power Purchase Agreements (PPAs) to enable large scale securitization of projects; standardised risk assessment protocols to expedite investor due diligence; a toolkit for contractors seeking growth capital, and the development of robust value propositions and sales support for contractors to take to market. This combination of standard investor-grade contracts and risk assessment protocols expedites the administrative process behind project deployment by securitizing the projects themselves. Finally, supporting contractors in their search for growth capital and in sales development results in the robust project pipelines that are key to qualification for project finance.

3) SEAF (2016-2018) Horizon 2020 project: In 2016, Joule Assets Europe won a €1.7 million two-year grant from the European Commission under the Horizon 2020 Programme for Research and Innovation Commission. The grant was awarded for the purpose of developing an online platform designed to enable energy efficiency and distributed renew-ables market opportunities in Austria, Belgium, Finland, France, Germany, Ireland, Italy, Portugal, Spain, and the United Kingdom. Joule has developed the eQuad tool for project valuation and portfolio management and investor engagement through the SEAF grant H2020 Project. The eQuad platform enables investment in efficiency renewables projects for small and mid-sized businesses.

4) FLEXICIENCY (2015-2019) Horizon 2020 project: Joule was adapting and demonstrating its ERA platform within FLEXICIENCY for energy efficiency and demand response initiatives and projects in Europe. Joule expanded its ERA platform to incorporate European market business models, and energy efficiency and demand response project opportunities. With this platform in place, Joule established a network of

contractors capable of developing projects and enable them to test the FLEXICIENCY platform in France. In addition, Joule established a network of capital market partners capable of funding all or portions of the Demand Response and Energy Efficiency projects generated from Joule financed projects. Joule worked with banks and other institutions to develop this network and to ensure that contracting structures are in keeping with their needs. Joule measured the economic business model results of the FLEXICIENCY demonstrations and developed and tested further business models made possible through the FLEXICIENCY platform. Joule's role as financing facilitator ensured that the resulting demonstration is accessible to all market participants and ensures exploitation of the project results. It also opened new business opportunities for Demand Response and energy efficiency service providers and contractors – who lacked access to adequate funds.

5) NOVICE (2017-2020) Horizon 2020 project: a three-year project funded by the European Union under the Horizon 2020 research and innovation program, developed and demonstrated a new business model in building renovation to better monetize energy efficiency. The new model consolidates services and subsequent revenue streams from both energy savings and demand response. Post-renovation energy savings provided to buildings and demand response (DR) services to the grid can reduce the payback period for these building investments and accelerate the much-needed market uptake of a performance-based financing model. As such, NOVICE introduced new actors (energy aggregators) in building energy upgrade projects and fostered their collaboration with energy supply companies (ES-COs), financing institutions, facilities management companies, and engineering consultants to facilitate the roll-out of the dual energy services model.

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

Joule Assets Europe Group (Italy)

Joule Assets Europe srl (JAE) is the Italian entity of Joule Assets, fully owned by Joule Assets Inc. Several European staff members of Joule Assets have employee contracts with Joule Assets Europe Group in Italy. An internal agreement between the 2 legal entities rules the remuneration of JAEG's LIFE contributions according to standardized practices (only actually incurred costs are remunerated). Various tasks in the CROSSFIT project will be supported by staff members belonging to JAEG.

In detail, JAEG staff will support the following WPs: 1, 3, 5, 6 & 7 - representing a total of 12.5 PMs (out of a grant total of 28.5 PMs for the beneficiary Joule Assets Europe srl). Overall, the staff costs average the initially budgeted amount and therefore no changes in the overall budget will occur. There are 6'000€ budgeted for LTP JAEG for travel costs.

5.2 EnerSave Capital

Legal name (short name):

ENERSAVE CAPITAL SARL (ESC)

EnerSave Capital is a Luxembourg based sustainable finance facilitator for sustainable assets. EnerSave Capital has experience in all facets related to sustainability based corporate finance and assists clients in the creation of investment products that will comply with the latest investor needs. EnerSave provides advisory services related to energy saving and green energy generation projects covering the structuring and placement of Equity and Debt Market Products and Sustainability themed Funds. In terms of financial services EnerSave provides corporate finance services, securitization services of sustainable cash flows by setting up securitisation compartments to refinance "ESG & Sustainability based cash flows" via Green Bonds.

Enersave provides As-A-Service solutions for different market players (ESCOs, aggregators, project developers, technology providers) such as Heating (HaaS), Lighting (LaaS), Cooling (CaaS), Behind the meter solar installations (EaaS) and E-mobility (E-MaaS) on a funded basis. Other services that EnerSave provides are ESG advisory services and Carbon solutions. By building upon EnerSave's experience and extensive knowledge on the financial sector within the energy efficiency and renewable space in the project EnerSave will lead WP3 Innovative finance for energy transition, lead tasks in WP2 and WP4 and

KEY STAFF

Csaba de CSIKY, male, Chairman and Senior Partner, Bachelor Degree In Business Administration and Economics from the American College in Switzerland and Degree in Business Administration and Economics Barcelona (Spain)

Mr. Csaba de Csiky is Senior Partner of Enersave Capital Sarl or ESC, a Luxembourg based sustainable finance facilitator that is supporting the financial implementation of the energy transition to net zero. The focal point of ESC is the structuring of sustainability focused investment funds and securitization structure. Mr.

Csiky sits on the boards of various companies, amongst them he holds the Chairmanship of Csiky & Co. Limited, a UK based sustainability focused investment banking boutique and Verdabelo ESCO Ltd, an FCA regulated finance provider. Previously he was on the Board of Directors at Creditanstalt Securities Ltd. and is a founding member of the Budapest Stock Exchange. After studying Economics and Business Administration at the American College of Switzerland and later Barcelona, he started his professional career at Merrill Lynch A.G. before joining Prudential-Bache Inc. as Senior Vice President. Csaba is bi-lingual in German and Hungarian, fluent in French and English, and has a working knowledge of Spanish and Italian.

Mr. Csaba de Csiky helped to transition of various types of project finance-based investments into tradable securities and has long experience as a trader and investment banker, alongside other partners within EnerSave Capital.

Mr. Csaba de Csiky main contributions will be related to WP3 Innovative finance for energy interventions, WP2, WP4 and WP6.

Alexandra HEDESIU, female, Managing Partner and Head of ESG, bachelor's degree in finance and MA in Political science (International development and Sustainability) from Babes-Bolyai University (Cluj-Napoca, Romania)

Ms Alexandra Hedesiu is the Managing Partner and Head of ESG and she is leading the EU work within Enersave Capital. Ms Hedesiu, furthermore, holds the position of vice-chair of the Brussels based Sustainable Energy Finance Association or SEFA an output of PROPEL a Horizon 2020 project. Alexandra, over the past years has lead ESC engagement in various LIFE and Horizon EU projects by providing her expertise on sustainability (ESG) in the financial sector with a focus on energy efficiency and renewable energy projects. Alexandra is a native Romania speaker; she is fluent in English and Italian has an intermediate level understanding of French and beginner level in Spanish

Within this project Ms Hedesiu will bring her expertise in sustainable finance and the knowhow accumulated in prior H2020 and LIFE projects and contribute to WP3 alongside Mr. de Csiky. Furthermore, Miss Hedesiu will manage all the administrative aspects (signing of documents, budget reports, organising meetings, travel planning and so forth), communication and drafting the different deliverables and/or reports that are part of the project.

PROJECTS OR ACTIVITIES

1) H2020 LAUNCH (started in 2019 June and ended in November 2021).

The project focus was on standardization and aggregation of small to medium size energy efficiency projects and renewable projects to be able to attract private finance. As ticket size is always an issue in the funding of projects the ideal tickets size from institutional investors is around 25Mio Euro. EnerSave was leading the work on financial schemes and legal contractual framework. An 'As a service' standardized contractual framework agreement was developed within the LAUNCH project, together with other templates and tools that would contribute to the acceleration of deal closure. The LAUNCH project was shortlisted as a lighthouse project by the EU.

2) H2020 PROPEL

PROPEL was the follow-on project after LAUNCH, project in which SEFA the Sustainable Energy Finance Association was set up. Enersave is one of the 3 initial founding members. Enersave led the work on the development of ESG templates, loan application templates, KYC template, equity finance and business models (As a service) were developed in the energy efficiency space. The financial standardized 'As a Service' contract developed for energy efficiency measures under LAUNCH was transposed into 10 EU legal systems and languages. EnerSave also led the work on matchmaking with investors. The Propel project is ending on 31st of Nov 2023.

3) H2020 V2Market

Is a Horizon 2020 project where Enersave made an economic viability assessment and developed the business plan for Vehicle to Grid services or V2G with a pilot implemented with the Area Metropolitan of Barcelona or AMB (ending in September 2024)

4) LIFE ENERGATE

Energate is a project where an online marketplace is created for sustainable investments within the built sector. Enersave is the financial expert that created the different user cases and roadmaps on the platform, designed the required technical, Due Diligence and financial KPIs required on the platform. The platform matches ESCo's with building owners and ESCO's /building owners with financiers. The aim is to accelerate the deal closure of sustainable projects. The projects started in Jan 2023 and will last till Jan 2025.

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

N/A

5.3 Vlaams Energiebedrijf – VEB

Legal name (short name):

Vlaams Energiebedrijf – VEB

DESCRIPTION OF PARTICIPANT

Vlaams EnergieBedrijf (VEB) is an external independent agency of the Flemish Government whose mission is to unburden the public sector towards more sustainable and efficient energy management. VEB was found with the main purpose of profoundly reducing energy demand at the side of the Flemish government. Gradually, VEB upscaled its target customer base towards all public authorities, also comprising the healthcare sector, the education sector, social housing, some federal institutions, the youth, culture, sports sector and foremost the sector of local municipalities.

VEB owns and governs the energy and patrimony data base Terra comprising the public building stock. Terra combines different data sources (for instance energy audits and energy scans), enabling the design of a proactive strategy for energy efficiency (f.e: specific customer targeting after the consultation of their energy consumption levels).

Along the way, VEB established a tailored energy efficiency department as well (now – October 2023 – counting 30 employees). The focus there is on the development of framework agreements. These customized project pipelines are designed for specific energy savings measures (building envelope, HVAC, relighting, lighting as a service, power purchase agreements, photovoltaics (incl: energy storage), monitoring as a service, energy scans, study trajectories, energy performance contracting facilitation, energy performance certificates, EV charging infrastructure). The framework agreements alleviate the need for public organisations to go through separate tendering procedures. VEB gathers several (sub)contractors on their framework agreement and awarding criteria on price, quality, technology determine which contractors will be eligible for the eventual implementation of the energy saving measures.

Building upon this experience, VEB contributes to the consortium by leveraging the Terra database for the identification of potential energy saving measures, disseminating its knowledge on sustainable public real estate management. VEB's framework agreement on monitoring as a service will enable local municipalities to keep track of their consumption levels. The eventual implementation of energy saving measures can also happen through the other framework agreements of VEB. Through its national and international network, VEB is also going to elaborate on the chosen path of breaking financial barriers for energy efficiency within the public sector. Unmistakably, the CrossFIT project is a crucial one to that end.

KEY STAFF

Thijs Halewyck (Male, Postgraduate Energy Monitoring and Energy Transition, MSc Business Engineering, business developer)

Thijs is at VEB for 2 years and a half now. After his studies in Business Engineering – where he took optional classes on energy markets – and a first work experience at the IT department of Colruyt Group, Thijs joined VEB to lead the Relance programme in his first year. Doing so, he managed a grant fund of 20 million euros to facilitate energy efficiency investments. In his 2nd year at VEB, Thijs got offered the opportunity to follow a hands-on postgraduate at HOWEST applied university on energy monitoring and energy transition technology. Apart from the knowledge base that he gathered there, he was able to develop some data challenges for VEB and familiarized himself with the ins and outs of energy management systems. Afterwards, Thijs co-supervised a master thesis on flexibility in the electricity grid. Now, he's responsible for working on persistently remaining financial obstacles within the public sector with regard to the energy transition. Within the team of business development, he shapes new business models and designs business models and plans for potential new services and products in the one stop shop of VEB.

On behalf of VEB, Thijs also holds a seat in the Flemish jury of urban renewal projects and the Sustainable Energy Finance Association.

On behalf of VEB, Thijs will oversee the sustainability and exploitability work package for the CrossFIT-project and will help to work on task 3.4 (financial engineering).

Tina Van Lierde (Female, MSc Applied Economics, Postgraduate international politics, Project lead)

With more than 15 years' experience in project management, business and process analysis and optimization projects in an international context, Tina started 5 years ago as project lead on energy efficiency at VEB. Tina

has managed several projects on masterplanning with public entities, is project lead for the PIO wind project (small and midsize wind at public entities), coordinated new framework contracts on energy efficiency studies and took the responsibility for the reporting on the Elena project. As project lead for the Horizon2020 project SURE2050, Tina took the coordinator role and responsibility for the deliverables of VEB on real estate strategies as well as the set-up of the framework contract for Real estate strategies.

Tina is best positioned to share the best practices and methodologies with regard to the real estate strategy and will therefore be an active participant in the workshops of task 2.1.

Frederik Hindryckx (Male, MSc in Civil Engineering, general management in the energy and utility sector, CEO) Frederik has been working in the energy business since 2001, after graduating in Electromechanical Engineering at the University of Ghent, Belgium. He held various positions at Electrabel and Eandis (the Flemish DSO), including operational and senior management positions and the innovation responsibilities in the Smart Grid and Business Development program. He joined the VEB as Chief Executive Officer in 2017 where he boosted the growth of the company and guided the company through various ambitious and innovative projects (e.g. Elena, Horizon 2020).

Frederik will hold an advisory role towards the crOSSfit consortium.

Frederik Christiaens (Male, MSc Industrial Engineer, MSc Economics, Manager Energy Efficiency)

After a few years of team management for a product development company, Frederik founded his own company in 2010 in energy consultancy. Between 2014 and 2017, he operated as business unit manager for a study bureau, E20, focusing more in-depth on energy savings in industrial processes, residential and non-residential building sectors. He was responsible for a widespread energy coaching program in the city of Ghent. Since 2017, Frederik manages the Energy Efficiency department of VEB. He further developed the department by launching framework contracts in energy audits, renewable energy and monitoring, as well as an increase from 4 to 13 team members during his first year. In the subsequent years, under the management of Frederik, the Energy Efficiency department grew gradually to a workforce of 30 employees in 2023, and three subteams (Study, Design & Build, OEPIC), including the launch of several new framework agreements and increasing turnover.

With the experience of upscaling business units in mind, Frederik will play an important advisory role in the entire work package 2.

Kenny Van Mele (Male, Purchaser & Public Procurement expert)

For 5,5 years, Kenny served as a procurement administrator for a Belgian city, where he was responsible for the entire procurement flow (defining of needs to awarding of the contract) of several hundred procurement tracks in services & deliveries, with a special focus on IT. He also helped develop a new procurement policy, updated for the new Belgian legislation about public procurement in 2017 and involving the specifics of the new decree regulation local governments going into effect on January 1st, 2019. Afterwards, he also helped shape & reform the procurement policies of the Institute of Tropical Medicine (ITM) in Antwerp, and briefly worked as a purchaser for the biggest hospital in Belgium. Since June 2023, he joined the Energy Efficiency unit at VEB as purchaser, responsible for the successful procurement process of all framework contracts, adapting contracts to valuable 'lessons learned' at their renewal and improving the general standard of the procurement process at the unit.

As such, Kenny's contributions will be crucial for task 2.4, the development of the technical tendering catalogue and eventually the design of the blueprint on energy efficiency OSS.

Wouter Spruyt (Male, MSc Business Engineering, financial controller)

After his studies with significant coursework in sustainability topics, Wouter started in 2019 as a project controller for an engineering company in the chemical industry. His responsibilities ranged from estimating project costs and cost analysis to project planning and progress measurement for projects with an investment cost ranging from 1 to 300 million euros. From 2023 Wouter works for VEB as a business controller, where he is responsible for financial analyses, budgeting, and financial reporting. He further works on automation and implementation of new software for reporting and internal financial processes.

Wouter will together with Thijs and Lieven be involved in the design of innovative financing solutions.

Lieven Van de Sype (Male, MSc Business Economics, International MBA Vlerick Business School)

Lieven worked for eight years as a financial auditor at EY (formerly Ernst & Young). His broad client portfolio had a strong focus on government and non-profit organizations. During this period, Lieven was also involved in the audit of several development aid projects for the Belgian government. After 10 years as a business controller in a listed media company and 3 years in a financial management position in an international assembly company, Lieven joined VEB in September 2021. In his role as CFO, he continues to build Finance into a function that not only provides accurate accounting and high-quality reporting but is also able to effectively use available data to support business decision-making, strategy formulation and strategy implementation.

Lieven will take on an advisory role on the innovative financing solutions to be designed in WP3.

Barbara Wauman (Female, PhD Civil Engineering, Building Physics; MSc Industrial Engineer in Construction)

In 2005, Barbara started her career as an educational assistant and researcher at the Sustainable Building research group of KU Leuven (Ghent). Her research focused in particular on the optimization of the energy-efficiency of non-residential buildings. Once finished successfully her doctoral thesis 'Evaluation of the quasi-steady-state method for assessment of energy use in school buildings', Barbara started working as a technical expert in energy performance regulations and methodologies at the Flemish Energy and Climate Agency (VEKA). For 7 years, she contributed as a policy officer to the implementation of the long-term strategy for the renovation of the Flemish building stock. In particular, she co-operated at the development of the building passport, the thorough revision and implementation of the energy performance certificates for residential and non-residential buildings and imposing the regulations on the obligation to renovate. Since October 2023, Barbara has been working for the Vlaams Energiebedrijf (VEB) as a product coordinator, optimizing internal products and processes with the aim of meeting the customer's needs even better in the near future.

Barbara will help to facilitate the roadmaps for OSS of the pilot countries in task 2.3.

Koen Swalens (Male, MSc Industrial Engineer, project lead energy audits)

From 2005 – 2021, Koen was responsible for identifying energy savings in industrial processes for several companies in different industrial sectors. After identifying the savings potential in these companies, Koen worked out reports for the management, so they are aware of this saving potential. After the management made their decision on when these energy saving actions were to be implemented, Koen had to report the effects of these actions to the Verification Bureau on a yearly basis, as well as the evolution of the total specific energy consumption of the companies. Since 2021, Koen is the project lead of Vlaams EnergieBedrijf for the framework contracts in energy audits.

Koen's experience with data collection and energy audits will be of great help in the transfer of knowledge under task 2.1.

Alexander Thomas (Male, Master in archaeology, anthropology and pedagogy, MBA, chief commercial officer)

Alexander works around 20 years in sales and sales related fields. The last 11 years he worked in different industries in sales management, of which around 6 years in the energy industry. Alexander joined VEB in August 2022. Within his role as Chief Commercial Officer at the VEB his business unit is responsible for facilitating the customer journey, including operational tasks such as organizing events, workshops, and executing market surveys. During his first year at VEB, Alexander upscaled his department from 6 to 17 employees.

With his experience in commercial dissemination, Alexander can take up an advisory role towards WP6 and WP7. Equally, Alexander will contribute in the knowledge transfer of key success factors with regard to the sales aspects under WP2.

Maureen Van den Meerssche (Female – MSc Industrial Engineering, Sustainable Energy, business developer)

Maureen Van den Meerssche, has been contributing to VEB since 2019. With a master's degree in Industrial Engineering, specializing in sustainability, Maureen previously worked as an external consultant for GreenFish Consulting before joining VEB. In her current role as a business developer, she oversees the data and Terra roadmap, a vital energy and building stock database, collaborating closely with the IT department. Maureen is responsible for the adoption of Terra following the phase-out of E-lyse, a high-level energy management tool. Additionally, she has served as the coordinator and assessor of the action plan Energy Efficiency, a subsidy program for Flemish government institutions.

With her experience in Terra and energy monitoring, Maureen will together with Koen help design the transfer of knowledge with regard to data collection framework under task 2.1.

PROJECTS OR ACTIVITIES
1. SURE2050

SURE2050 (Sustainable Real Estate) started in May 2019 and lasted till April 2023. The aim of the project was to introduce Strategic Public Real Estate management within the public sector in Flanders with the objective of facilitating and mobilizing large scale sustainable investments in public real estate. Through SURE2050 VEB was able to put SPREM (Sustainable Public Real Estate Management) on the mental map of many municipalities. SURE2050 will definitely serve as a stepping stone towards the cROSSfit consortium.

<https://sure2050.be/>

2. CITIZEE

CitiZEE was a European funded project aimed at supporting European public authorities to scale up investments in energy efficiency in the built environment through attracting private and blended finance (of citizens). CitiZEE started in April 2019 and lasted to June 2022. VEB developed a financing scheme for the healthcare and education sector together with ESCO's; leading to the identification of up to 20 energy performance contracting trajectories within those sectors.

<https://www.citizee.eu/> and <https://www.veb.be/go>

3. Relance – VV011 under the Recovery and Resilience Facility Fund

VEB took the coordination of accrediting RELANCE financial support towards energy efficiency renovation projects in the public sector. Through Relance VEB gained expertise on financing and managing larger grants to facilitate energy efficiency investment, boosting its internal business processes. The total program comprises 20 million euros of subsidies. VEB enabled the refurbishment of more than 1.000.000 m² floor area, largely surpassing the initial target of 235.000 m².

<https://nextgenbelgium.be/nl/project/2-5-minder-energiegebruik-in-openbare-gebouwen-per-jaar-in-vlaanderen>

4. PIO Wind

Innovation project on the potential of small and medium sized wind turbines in the public sector. The project is still running and consists of a study part and pilot projects. VEB is project lead.

<https://www.innovatieveoverheidsopdrachten.be/node/6425>

5. PPA City of Ghent

Procurement project on local renewable energy through a power purchase agreement. City of Ghent was the procuring public authority. Beauvent was selected as party to invest and realise in the solar installation. VEB did the preparation of the project and the procurement. This project won the PROCURA+ award 2022. Thanks to this, expertise on PPA structures and local renewable energy projects is now an in-house asset for VEB.

<https://stad.gent/nl/groen-milieu/nieuws-evenementen/meer-groene-stroom-voor-gent-dankzij-17000-nieuwe-zonnepanelen-aan-rigakaai>

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

5.4 Sustainable Energy Finance Association (SEFA)

Legal name (short name):	Sustainable Energy Finance Association (SEFA)
DESCRIPTION OF PARTICIPANT	
The Sustainable Energy Finance Association (SEFA) is the European trade association for the	

sustainable energy industry. Our mission is to accelerate the development and financing of sustainable energy initiatives across Europe's built environment, in a manner which encourages economic growth, job creation and renewal.

Sustainable energy, which encompasses both energy efficiency and renewable energies, is the keystone of our vision of a carbon-neutral economy.

Our members are key to the long-term growth of energy efficiency and distributed renewable energy. They are innovative change makers, transforming buildings and infrastructure into efficient, clean energy users; enabling the public and private sector to create growth and enhance well-being through the decarbonization of the built environment. Our ranks include building asset owners from across Europe, alongside financial institutions, technology providers, Energy Service Companies (ESCOs), and consultancy experts.

The founding of SEFA is the fruit of a series of projects funded under the Horizon 2020 program over the past seven years. Building on this legacy, our founding members have acquired considerable expertise in raising private finance for energy projects, thus gaining credibility with financiers and asset owners.

SEFA is a dynamic force driving sustainable energy finance and policy development forward across Europe, and its ongoing commitment to meeting the challenges of the sustainable energy industry is reflected in:

- The capacity building initiatives and the provision of comprehensive toolkits, assisting industry players in overcoming the knowledge gaps, such like the standardized collateral.
- The facilitation of financing accessibility, particularly for smaller projects, achieved through bundling and the establishment of a matchmaking platform.
- The dedication to supporting and shaping policy initiatives that respond to the diverse interests of our members within the sustainability industry and address challenges specific to their national contexts.

KEY STAFF

John O'Rourke, Male, Chairman of the Board

John brings 28 years of business development experience in the clean energy sector. He runs NEG in Ireland, helping commercial and industrial companies identify efficiency opportunities and implement practical solutions to reduce asset operating costs, manage climate risk on the balance sheet and improve asset performance.

His career in the U.S. has included roles with energy demand management consultancies Xenergy and Energy Investment, Inc., as Director of Engineering and Operations for Duke Energy, an unregulated subsidiary of Duke Solutions, and as Managing Director of Lime Energy and Applied Energy Management, Inc. During these years, John has demonstrated a keen ability to design and execute various business models, as well as to raise equity and debt financing.

Jessica Stromback, Female, Executive Director

Jessica is the Chief Executive Officer of Joule Assets in the US and Europe. Jessica oversees Joule's work in Europe helping energy efficiency and renewable energy project managers access funding. In this regard, Joule has helped European projects secure over €200 million.

She also co-founded SmartEn Association with the aim of promoting the active participation of flexible demand-side resources in European electricity markets. Before Joule, Jessica led several EU-funded projects and consultancy projects at VaasaETT Ltd in Finland. Her expertise also extends to consultancy and research projects for energy services, power utilities and technology service companies.

In the US, Jessica successfully managed the implementation of community solar capacity and renewable energy supply contracts on behalf of municipal customers through Community Choice Aggregation (CCA) programs.

PROJECTS OR ACTIVITIES

1) LAUNCH H2020

LAUNCH H2020 aimed to accelerate deal closure and pipeline growth for Sustainable Energy Assets through a standardised, investor grade EEaaS contract, standardised risk assessment protocol, a roadmap for project developers towards accessing growth capital, and market-tested value propositions for developers' end-clients. The LAUNCH consortium piloted these tools with developers, projects, and capital providers

2) PROPEL H2020

PROPEL H2020 kicked off in June 2021, with the aim of creating a holistic resource centre – the Sustainable Energy Finance Association (SEFA) – to develop, sell, contract and finance sustainable energy projects at the required scale in Europe. SEFA now acts as THE knowledge and resource centre for the mainstreaming of finance into sustainable energy assets.

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

N/A

5.5 RdA Climate Solutions

Legal name (short name):

RdA Climate Solutions, Unipessoal Lda. (RdA Climate Solutions)

DESCRIPTION OF PARTICIPANT

RdA Climate Solutions is an advisory boutique specialised in climate change mitigation and adaptation strategies. RdA's team include world-class experts in climate change, energy transition and sustainable finance supported by relevant international experience. With deep market knowledge and track record, we partner with our clients providing bold, integrated and independent solutions to address their business challenges, helping them prosper with low-carbon and climate resilient solutions. RdA's clients include SMEs and multinationals, financial institutions and public entities such as cities and central governments across Europe.

RdA as in its team the Local Expert for EIB's Private Finance for Energy Efficiency (PF4EE), and the Engineering Expert in the development of several EBRD's Green Cities Action Plans. RdA is involved in several Research and Innovation projects, from helping to unlock the potential of energy efficiency actions as a global asset class to the promotion of new business models for biowaste. RdA is also supporting the European Commission in the matchmaking of leading ESG investors with cities and project developers under the Smart Cities Marketplace and the Clean Energy for EU Islands Secretariat. More recently RdA was selected to join the Investors Dialogue on Energy supporting European Commission to assess existing energy financing schemes and propose upgrades for these.

RdA was a strong network among cities (both at national and European level) and the financial community and relevant expertise in the development of local OSS, for instance RdA is involved in [Porto Energy Hub](#). It is relevant to mention that RdA is involved in several European initiatives such as the Smart Cities Marketplace, providing the right framework for the dissemination of energy efficiency projects implementation. As such, RdA entails the necessary knowhow and expertise to achieve the goals of its main role in the cROSSfit project.

KEY STAFF

Jorge RODRIGUES DE ALMEIDA, male, Managing Partner, MSc.

Jorge is the founder and Managing Partner of RdA Climate Solutions and has been a leading adviser on sustainable energy and finance, and climate adaptation, working for the almost 20 years at European level for governments, cities, and major industries. Currently, he is Chairperson of the HOOP Circular Investors Board, Smart Cities Marketplace Matchmaking Expert, Local Expert for EIB's Private Finance for Energy Efficiency (PF4EE), Expert in the development of several EBRD's Green Cities Action Plans, and Portuguese ESCO Association's Board Advisor. Regular public speaker at industry events and author of several articles published in Portuguese Magazines and Newspapers.

Joana ANDRADE, female, Managing Partner and Innovation Director, PhD

Joana is PhD in Sustainable Construction, an expert in sustainable building design and assessment with more than 12 years of experience. She is LEED Green Associate since 2018 and is certified nZEB designer since 2016. Currently, she is Managing Partner and Innovation Director at RdA Climate Solutions managing the Porto Energy Hub and District C projects, sustainable finance, and climate action projects. She integrates the Matchmaking team of the Smart Cities Marketplace, supporting cities in preparing project concepts and connecting them with investors, and supports the innovation activities of the HOOP project.

Leandro Vaz, male, Operations Director, PhD

PhD in Marine Science, Technology and Management, Leandro has more than ten years of experience in research focused on sustainability and climate change. As a result, he is the author of several articles published in international indexed research journals, communications in international reference conferences, and has been involved in numerous European research projects. More recently he is **Operations Director at RdA Climate Solutions** being deeply involved in the Smart Cities Marketplace project integrating the matchmaking team, and in the Clean Energy for EU Islands providing technical assistance to EU islands on clean energy projects.

Ricardo Teixeira da Silva, male, Senior Project Manager, MSc.

Senior Project Manager at RdA Climate Solutions, Ricardo has more than 12 years of professional experience in climate adaptation and sustainability, both in national and international projects. At European level, he has participated, either as researcher or expert, in 5 different EU projects (EdiCitNet, SPARCs, RESPONSE, DISTENDER and Every1) and was involved in multiple grant writing proposals. At national level, Ricardo has participated in several climate adaptation plans and as a consultant for the impact assessment one Sustainable Energy Plan.

Luís Rego, male, Financing Senior Advisor, MSc

Master in Business Management. He was a technical staff member at Banco BPI for 32 years. He provided financial advice to local and regional public sector entities, port administrations and water, wastewater and waste management organisation. Since 2014 he has been involved in the financing of energy efficiency and renewable energy in Portugal and Spain under a project finance regime. Currently, he is Senior Advisor at RdA Climate Solutions providing expertise in the development of affordability studies, structuring of business cases and bankability analysis.

PROJECTS OR ACTIVITIES
1) Porto Energy Elevator (PEER)

A H2020 is a PDA project aiming to support a novel building renovation programme, through the implementation of a one-stop-shop, to fight energy poverty by promoting buildings energy efficiency, renewable self-consumption energy communities and mainstreaming new financial schemes. RdA is responsible for business models and support digitalisation (2021-2024). N. 101033708 <https://portoenergyhub.pt/>

2) Enable eVeryone's Engagemet in the eneRgY transitiON (EVERY 1)

Every1 is a LIFE project under Horizon Europe that brings together leading experts in energy and education, and experts in ecosystems combined with social sciences to deliver an impactful concept that includes all elements needed to enable an effective participation of all European stakeholders in the digital energy market. Hence, Every1 uses a deep understanding of stakeholders, networks, regulation, and solutions, to design and deliver tailored learning paths, matching learning as well as capacity building material covering 10 different European languages. (2022 – 2026) <https://every1.energy/>

3) Clean Energy for EU Islands Secretariat

An OSS for Europe's Island communities transitioning to clean energy. Aims to facilitate clean energy transition from the bottom up. It builds on the vision to assure the best environment for change, and to benefit all members of the island communities, a balanced collaboration between public and private stakeholders. RdA is responsible for matchmaking and helping islands developing innovative business models and financial schemes and engaging leading investors. (2021 – 2022) <https://euislands.eu/>

4) Smart Cities Marketplace

Bringing together cities, industries, SMEs, investors, researchers and other smart city actors. The Smart Cities Marketplace is a major market-changing undertaking supported by the European Commission bringing together cities, industries, SMEs, investors, researchers and other smart city actors. RdA is the responsible for the matchmaking between city project developers and investors and for the business models, finance and procurement action cluster. (2019 – 2022), <https://eu-smartcities.eu/>

5) Local Action Plans

RdA has been involved in the development of several Local Action Plans, both at national and international level (several EBRD's Green Cities Action Plans). Its role entails strong emphasis on mitigation and energy poverty alleviation actions, being the creation and deployment of one-stop-shops a main target. For instance, RdA has supported the several cities in Portugal, namely: Maia, Matosinhos, Trofa, Valongo, Gondomar, Vila Franca de Xira; at international level Support the development of EBRD's Green Cities Action Plans namely under the sectors of Energy and Buildings, namely in Bălți (Moldova), Almaty (Kazakhstan), Novi Sad (Serbia).

Romania: Timisoara

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

N/A.

5.6 CITIES NETWORK FOR SUSTAINABLE DEVELOPMENT AND CIRCULAR ECONOMY (SCN)

Legal name (short name):

"CITIES NETWORK FOR SUSTAINABLE DEVELOPMENT AND CIRCULAR ECONOMY" - "SUSTAINABLE CITY" (SCN)

DESCRIPTION OF PARTICIPANT

The "CITIES NETWORK FOR SUSTAINABLE DEVELOPMENT AND CIRCULAR ECONOMY" (SCN) was established as a civil, non-profit organization with the intention to provide substantial technical support in informing, networking and managing the Municipalities that partake in it, enabling them to prepare and submit proposals to European Programmes and utilize the available funding.

The members of the Network are 74 Municipalities from Greece and Cyprus, the National Technical University of Athens, the Maniatakion Foundation, the Institute of Environment and Sustainable Development of Cyprus and the Regional Association of Solid Waste Management Bodies of Peloponnese Region.

The leading aspiration of the Network is to plan and act to develop a network of cooperation among its members as far as the sectors of Sustainable Development, Sustainability, Environmental Protection, Circular Economy, Climate Change are concerned. The main objective is to promote cooperation among its members and other entities which are not members of the network, towards the improvement of the physical, cultural, social environment and the level of people's welfare living in the wider boundaries of the municipalities involved.

The network seeks to actualize its objectives through scientific and technical research and technical support in the phase of the design and submission of proposals and, subsequently, operation, ultimately aiming to develop and implement innovative programs and policies in the following sectors: Sustainable Development, Strategic and Operational Outlines, Protection of the Environment, Circular and Social Economy and Eco-innovation, Waste Management, Sustainability, Cultural Promotion and Growth, Tourism Development, Agricultural Development, Facilitating participation in Employment, Reconstructing and Fostering social cohesion, Energy Conservation.

KEY STAFF

Ioannis GEORGIZAS, Male, General Manager, MSc in Information Technology, MBA

Mr. Georgizas Ioannis is the General Manager of SUSTAINABLE CITY. He is Physicist and holds a MSc in Information Technology from Middlesex University of London and executive MBA from the Athens University of Economic and Business. He is an expert business analyst and Project Manager for ERDF and European projects. He has more than twenty-five years of experience as project coordinator for the public and private sector and as a software developer. He has worked as a Project Manager in public and private IT projects as well as sustainable development, energy saving and circular economy projects. He has extensive experience in managing European programs as he was one of the executives of Management Organization Unit, in Hellenic Ministry of Development, for more than fifteen years. He was head and coordinator of major projects and has great experience in European proposal submissions by Greek and European consortiums.

Theodora ANDRINOPOULOU Female, Senior Project Manager, Physicist – Environmentalist MSc

Ms. Andrinooulou Theodora is certified to conduct Environmental Studies for the public sector. Her working experience includes more than ten years of experience as a business consultant for public and private

investment projects. She is a member of the Registry of Evaluators for Development Law. She also has expertise in the conduction of studies for ISO certification (9001, 14001, 22000). She has extensive experience in managing European projects.

Nikoletta MANETA, Female, Project Manager, Environmentalist MSc

Ms. Maneta Nikoletta has a degree in Environmental and Natural Resources Management from the University of Patras and a master's degree in Energy and Environmental Management from the University of Piraeus. She has experience as Project Manager in European projects. Her field of expertise also includes ERDF project support, as she has significant experience in managing and monitoring National Projects. She is also involved in environmental studies and conducting studies for ISO certification (9001, 14001, 22000).

PROJECTS OR ACTIVITIES

SCN has participated as a partner and project coordinator in various relevant European and National projects. Some of them are:

1) **PATH2LC - Public Authorities together with a holistic network approach on the way to low-carbon municipalities (H2020)**

The project aims to support policy makers and public authorities at local level in the transition process towards a low carbon society. Through a holistic network approach, stakeholders in public authorities are linked among municipalities in order to enable peer-to-peer learning and increase the engagement in energy and climate transition. The network approach shall also accelerate the implementation of Sustainable Energy (and Climate) Action Plan (SE(C)AP) measures.

SCN fosters exchange of existing knowledge and experiences among municipalities and enhance coordination and cooperation among different administrative bodies, local stakeholders and civil society. SCN also assists the process of planning and disseminating monitoring tools to implement transition roadmaps.

2) **POWERPOOR - Empowering Energy Poor Citizens through Energy Cooperative Initiatives (H2020)**

The objective of POWERPOOR is to develop support programmes and schemes for energy poor citizens and encourage the use of alternative financing schemes (e.g. establishing energy communities / cooperatives, crowd funding). POWERPOOR will facilitate experience and knowledge sharing, as well as the implementation of small-scale energy efficiency interventions and the installation of renewable energy sources, increasing the active participation of citizens.

SCN supports local and regional authorities in Greece to tackle energy poverty. The Network participates in the POWERPOOR capacity building activities and certifies representatives from Municipalities as Energy Supporters and Mentors. In addition, the Network has established energy poverty alleviation offices in several of its Municipalities - Members.

3) **ENERGATE: "Energy Efficiency Aggregation platform for Sustainable Investments" (LIFE CET)**

ENERGATE aims to create an efficient energy efficiency market, using ICT, which will bring together energy services and sustainable financing, increasing the chances of financing and accelerating the rate of building renovation. It envisages to transform the complex set of decision-making actions, for targeted groups, including non-experts, into a user-friendly and single-entry service.

SCN is involved in the creation of the platform, in identifying and engaging with stakeholders who would like to be trained in the use of the platform and in financing energy upgrades in general. SCN is also involved in the replicability, exploitation, dissemination of the project and the piloting of the platform.

4) **DECIDO: eviDence and Cloud for more Informed and effective pOlicies (H2020)**

DECIDO is a three-year EU-funded project that aims to support and increase capacity building of Public Administrations regarding the utilisation and exploitation of open data in the field of disaster risk management and the implementation of appropriate customised evidence – based policies.

The result of the project will be the identification of a set of pathways, recommendations and a sound business plan directing Public Authorities through the transition towards the use of the European Cloud Infrastructure and the application of evidence and co-creation in the policy lifecycle.

SCN leads the Greek pilot with the purpose to take advantage of the knowledge generated through the tool "Databuild" (overall energy consumption, backup power capacity etc.), combine it with data from other repositories (weather data, geological data etc.) and analyse them to enforce evidence-based policies regarding power outage emergency response. As such, the purpose of this pilot is to take advantage of existing data, tools, frameworks and methodologies to 1) develop a comprehensive roadmap that provides to local municipalities a holistic solution that can help them develop emergency response mechanisms for power outages in their regions and 2) identify the parameters that lead to power outages and develop evidence-based predictive measures.

5) **ECO SENSE Labelling: Leadership in Climate Mitigation and Adaptation (GSRT-General Secretariat for Research and Technology - Greece)**

The project aims to support municipal enterprises for the effective implementation of the actions to reduce their carbon footprint and get adapted to climate change. Therefore, it focuses on the design of the integrated ECO SENSE platform and label, which include four main software and hardware tools to support decisions on: (a) carbon footprint mitigation actions and (b) actions for the adaptation to climate change of public sector's enterprises.

These tools will be developed based on existing tools of participating partners, tailored according to the new needs and appropriate interconnections of the ECOSENSE platform.

SCN had an important role in engaging and guiding municipalities towards energy resilience and climate neutrality through a series of actions and tools, allowing them to obtain a certification that assures their climate resilience and clean energy transition. SCN also contributed to the development of the ECO SENSE tools.

AFFILIATED ENTITIES / ASSOCIATED PARTNERS

SCN is not engaging any affiliated entities or have any associated partners

5.7 Energies Renovables Públiques de Catalunya (ENER)

Legal name (short name):

Energies Renovables Públiques de Catalunya, SAU. (ENER)

DESCRIPTION OF PARTICIPANT

L'Energètica operates primarily within the renewable energy sector, focusing on the development and implementation of various sustainable energy projects. The main objective of L'Energètica is to generate, at least, the energy equivalent to 100% of the Catalan Government consume and its public sector.

L'Energètica operates as a dynamic and forward-thinking organization, with a diverse team comprising skilled professionals and experts in the field of renewable energy. Our workforce includes experienced engineers, project managers, energy experienced lawyers, and administrative staff who collectively contribute to the successful execution of our initiatives.

Key Activities:

1. The production of electricity from renewable energy sources (solar, wind and hydropower).
2. The promotion, management, operation, maintenance and marketing of electricity generation facilities using renewable energy sources.
3. The marketing, sale and storage of electricity generated through electricity production facilities using renewable energy sources.
4. Promote and participate in the creation of renewable energy communities and citizen energy communities.
5. Participation in the ownership or financing of renewable generation projects.
6. Participation in the provision of electric vehicle recharging services and services for the injection of energy into the grid from electric vehicles.
7. The carrying out of studies and research related to renewable energies and technologies applicable to this activity, applicable to this activity.

Our primary objective for this project is to leverage the expertise of our team and actively acquire the necessary knowledge and practical insights related to energy efficiency projects and interventions. By collaborating with industry experts, piloting and engaging in comprehensive research and development, we aim to rapidly acquire the essential know-how and best practices to effectively integrate best practices in our tender procedures in the renewable energy and energy efficiency solutions into our future endeavours. Our commitment to continuous learning and the acquisition of new skills underscores our dedication to fostering innovation and excellence within the energy efficiency and renewable energy landscape.

ENER will lead WP4 Pilot implementation, and will contribute to all WP throughout the entire project.

KEY STAFF

Gil LLADÓ, male, Head of the Generation Department, Engineer

Gil is a seasoned Energy Transition Manager with over 9 years' experience at Àrea Metropolitana de Barcelona (AMB). He spearheaded the establishment of the energy transition office, leading a multidisciplinary team of 11 individuals. His accomplishments include securing €64M in funding, conceptualizing projects, and defining long-term energy transition visions. Gil excels in monitoring regulatory frameworks, benchmarking technologies, and advising on energy matters for various public and private entities.

Carmen FDEZ-MIRANDA, female, Junior Engineer, MA Industrial Engineering

Carmen holds a degree in Industrial Engineering and a master's degree in industrial engineering, specializing in Energy. With a strong passion for the energy sector, her background includes two years of hands-on experience in photovoltaic projects. During her time at various companies, she contributed to drafting pre-sales proposals, feasibility studies, and budgets for photovoltaic installations.

Arnau ALARCÓN, male, Senior Engineer, MA International Cooperation

Arnau holds a degree in Industrial Engineering and a master's degree in international Cooperation. He has been working over 13 years in overseeing diverse renewable energy projects, from photovoltaic installations to energy efficiency initiatives. Skilled in coordinating technical operations, conducting energy audits, and driving sustainable practices. Strong leadership in executing large-scale projects and promoting eco-friendly solutions.

PROJECTS OR ACTIVITIES
<p>L'Energètica is a public company that operates as a one stop shop in the renewable energy sector, focusing on the development and implementation of various sustainable energy projects. The main objective of L'Energètica is to generate, at least, the energy equivalent to 100% of the Catalan Government consume and its public sector.</p> <p>At the same time L'Energètica proposes the implementation of an innovative Energy Service Company (ESCO) model in collaboration with the Generalitat de Catalunya to integrate renewable energy solutions and optimizing energy efficiency across its diverse range of public buildings. Our comprehensive approach aims to incorporate photovoltaic systems on the rooftops of key government structures, including the Department of Education, Health, Justice, and other administrative offices.</p>
AFFILIATED ENTITIES / ASSOCIATED PARTNERS
N/A

Detailed Budget Table

crOSSfit

Important:

You may add rows but no additional tabs. This may result in your proposal being considered inadmissible.
Please ensure that the file can be printed on a format of 1 page wide (number of pages depending on the number of participants).
Please make sure that the figures in this table are consistent with the total budget provided in part A section 3 of the application.
In case of inconsistencies, part A will prevail.

Staff effort allocation

Fill in the effort per work package and Beneficiary/Affiliated Entity.
Please indicate the number of person-months over the whole duration of the planned work.
Adapt the columns to the number of work packages in your proposal.
Identify the work-package leader for each work package by showing the relevant person-month figure in bold.

Participant Number/Short Name	WP1	WP2	WP3	WP4	WP5	WP6	WP7	Total
1. JAE	7	2	1.5	1	1.5	2	1	16
AE: JAEG	6	0	3.5	0	1	1	1	12.5
2. ESC	3	4	9	8.5	2	3	2	31.5
3. VEB	2.5	6.5	3.5	5	1	1	1	20.5
4. SEFA	3.5	1	4	0	1	5	5	19.5
5. RDA	2.5	3	1	10.5	7.5	6	5	35.5
6. SCN	2.5	3	1	11	8.5	4	3	33
7. ENER	2.5	3	1	10	7	4	3	30.5
9.								0
10.								0
Total person-months	29.5	22.5	24.5	46	29.5	26	21	199

Personnel costs

Present your estimated "Personnel costs" split into 3 categories as per the table below. If you do not have any personnel costs falling under "A.4 SME owners and natural person beneficiaries" or "A.5 Volunteers", all personnel costs should be budgeted under "A1. Employees (or equivalent); A2. Natural persons under direct contract and A3. Seconded Persons".

For A.4 SME owners and natural person beneficiaries: please note that as per Annex 2a of the LIFE General Model Grant Agreement (MGA), a unit cost is applied to this cost category. The units are the days spent working on the action (rounded up to the nearest half-day) and the amount per unit (daily rate) is calculated according to the following formula: (EUR 5 080 / 18 days = EUR 282,22 per day) multiplied by {country-specific correction coefficient of the country where the beneficiary is established}.
Note that the country specific correction coefficient to use is the one applied for the Marie Skłodowska-Curie Actions (MSCA). Yearly rates are published in the Horizon Europe Work Programme – Marie Skłodowska-Curie Actions under the funding and tender portal Reference Documents (work programme and call documents section), available at <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents;programCode=HORIZON>.

For A.5 Volunteer Costs: a unit cost is also applied to this cost category. The units are the days spent working on the action (rounded up to the nearest half-day) and the amount per unit (daily rate) is a country specific rate of the country where the beneficiary is established. Country specific rates to apply can be found in the LIFE MGA on pages 83 & 84.

Participant Number/Short Name	Country	Number of person months (staff effort per beneficiary)	Average monthly salary rate	A1. Employees (or equivalent); A2. Natural persons under direct contract and A3. Seconded Persons (costs)	A.4 SME owners and natural person (sole trader) beneficiaries (Unit costs in €)	Subtotal personnel costs without volunteers (A1+A2+A3+A4) - must be the same as in part A section 3	A.5 Volunteers (Unit costs) must be the same as in part A section 3	Total Personnel costs
1. JAE	BE	16	6,963 €	111,413 €		111,413 €		111,413 €
AE JAEG	IT	13	8,182 €	102,273 €		102,273 €		102,273 €
2. ESC	LU	32	9,500 €	299,250 €		299,250 €		299,250 €
3. VEB	BE	21	9,500 €	194,750 €		194,750 €		194,750 €
4. SEFA	BE	20	8,000 €	156,000 €		156,000 €		156,000 €
5. RDA	PT	36	4,000 €	142,000 €		142,000 €		142,000 €
6. SCN	GR	33	4,000 €	132,000 €		132,000 €		132,000 €
7. ENER	ES	31	4,532 €	138,229 €		138,229 €		138,229 €
9.		0	#DIV/0!			0 €		0 €
10.		0	#DIV/0!			0 €		0 €
Total		0		1,275,915 €	0 €	1,275,915 €	0 €	1,275,915 €

Subcontracting

Give details on subcontracted action tasks (if any) and explain the reasons why (as opposed to direct implementation by the participants).
Subcontracting — Subcontracting means the implementation of action tasks, i.e. specific tasks which are part of the action and are described in Annex 1 of the Grant Agreement.
Note: Subcontracting concerns the outsourcing of a part of the action to a party outside the Consortium. It is not simply about purchasing goods or services. We normally expect the participants to have sufficient operational capacity to implement the project activities themselves. Sub-contracting should therefore be exceptional.
 Include only subcontracts that comply with the rules (i.e. best value for money and no conflict of interest; coordinator tasks can normally not be subcontracted).

Participant Number/Short Name	Subcontract Description	Cost (€)	WP	Justification (Why is subcontracting necessary?)
	Total estimated costs	0 €		
If subcontracting for the entire project goes beyond 30% of the total eligible costs, give specific reasons.	Insert text			

Other direct costs

Please complete the table below for each participant. If required add further tables at the end of this work sheet (one per participant).
 Please ensure that sufficient details are provided in part B. For major cost items add lines below, in order to provide a detailed breakdown within one cost category.
 For major items listed in the justification column, indicate the work package to which they belong.
 For equipment and infrastructure, please explain if the cost represents the full cost or the depreciation.

1. JAE	Cost (€)	Justification
Travel & subsistence	9,000 €	Travel to 3 project meetings with 2 staff members, 4 dissemination events, 2 pilot implementation meetings, with 1 staff member at 750€ per trip
Equipment (incl. infrastructure)		
Other goods, works and services		
Financial support to third parties		
Land purchase		
Total	9,000 €	
AE JAEG	Cost (€)	Justification
Travel & subsistence	6,000 €	Travel to 2 project meetings with 2 staff members, 2 dissemination events, 2 pilot implementation meetings, with 1 staff member at 750€ per trip
Equipment (incl. infrastructure)		
Other goods, works and services		
Financial support to third parties		
Land purchase		
Total	6,000 €	
2. ESC	Cost (€)	Justification
Travel & subsistence	12,000 €	Travel to 5 project meetings, 4 dissemination events, 4 pilot implementation meetings, 3 financial stakeholder meetings with 1 staff member at 750€ per trip
Equipment (incl. Infrastructure)		
Other goods, works and services		
Financial support to third parties		
Land purchase		
Total	12,000 €	
3. VEB	Cost (€)	Justification
Travel & subsistence	9,000 €	Travel to 5 project meetings, 4 dissemination events, 3 pilot implementation meetings with 1 staff member at 750€ per trip
Equipment (incl. infrastructure)		
Other goods, works and services	20,000 €	5k€ Organisation of 2 capacity building workshops including room rental and catering, 15k € Legal expertise to review public tendering and further legal agreements for the Belgian OSS extension
Financial support to third parties		
Land purchase		
Total	29,000 €	
4. SEFA	Cost (€)	Justification

[illegible]

Proposal ID
SEP-210999095

Call for Proposal
LIFE-2023-CET

Topic
LIFE-2023-CET-OSS

Associated with document Ref. Ares(2024)5298176 - 22/07/2024
Type of Action
LIFE-PJG

LIFE Programme – Application Forms (Part C – KPI)

Horizontal KPIs for all LIFE applicants (Mandatory to report on all the KPIs of this section).

Innovation Is your project proposal developing, demonstrating and promoting innovative techniques and approaches? <input checked="" type="radio"/> Yes <input type="radio"/> No	Governance Is your project proposal improving governance through enhancing capacities of public and private actors and the involvement of civil society? <input checked="" type="radio"/> Yes <input type="radio"/> No	Plans & strategies Is your project proposal implementing key plans or strategies? <input checked="" type="radio"/> Yes <input type="radio"/> No
Catalytic effect - Financial Will your project trigger additional investments? <input checked="" type="radio"/> Yes <input type="radio"/> No	Catalytic effect - Spatial Will the results of your project be replicated beyond its intended geographical scope? <input checked="" type="radio"/> Yes <input type="radio"/> No	Catalytic effect - Thematic Will the results of your project be replicated (transferred) beyond its intended thematic scope? <input checked="" type="radio"/> Yes <input type="radio"/> No
Catalytic effect - Societal Will your project : a) Contribute to the development of new or existing national legislation, policies, regulations, incentives and voluntary commitments? b) Achieve a step-change in more effective compliance with and enforcement of Union environmental and climate legislation and/or in policy implementation? c) Achieve a step-change in awareness and support of environmental and climate matters? d) Establish a new macroregional or national model of cooperation (networking)? <input checked="" type="radio"/> Yes <input type="radio"/> No		Rio markers for climate, biodiversity and air quality Please indicate if your proposal: <ul style="list-style-type: none">• Has climate change/ biodiversity/ air quality as their primary objective• Has climate change/ biodiversity/ air quality as their secondary objective and provide substantial contributions to these objectives• Does not contribute significantly to climate change/ biodiversity/ air quality Climate change Primary Objective Biodiversity Not contributing Air quality Secondary Objective

Clean Energy Transition – Specific KPIs (Please report on KPIs you consider relevant).

Primary Energy Savings Please enter the Primary Energy Savings in GWh/year triggered by the project		
Project-End Value 42.64	5 years beyond Project-End Value 5,545	Unit GWh/year

Final Energy Savings

Please enter the Final Energy Savings in GWh/year triggered by the project

Project-End Value	5 years beyond Project-End Value	Unit
20.8	2,705	GWh/year

Renewable Energy generation

Please enter the Renewable Energy generation in GWh/year triggered by the project

Project-End Value	5 years beyond Project-End Value	Unit
60.9	609	GWh/year

GHG emissions

Please enter the reduction of greenhouse gas emissions in tons of CO2 equivalent per year (tCO2eq/year) triggered by the project

Project-End Value	5 years beyond Project-End Value	Unit
31,690	2,172,000	tCO2eq/year

Investments in sustainable energy

Please enter the amount of cumulative investments in sustainable energy triggered by the project

Project-End Value	5 years beyond Project-End Value	Unit
52	3,000	mEUR

Legislation And policy

Please enter the number of legislation, policies or strategies created/adapted [to include sustainable energy issues] at any governance levels due to the project

Project-End Value	5 years beyond Project-End Value	Unit
		Number of documents

Innovation Uptake 1

Please enter the number of products (goods or services), processes and methods launched into the market by the project

Project-End Value	5 years beyond Project-End Value	Unit
3	7	Number of products / processes / methods

Innovation Uptake 2

Please enter the number of real life implementation sites carried out by the project

Project-End Value	5 years beyond Project-End Value	Unit
47	1,839	Number of real life implementation sites

Skills

Please enter the number of market stakeholders trained with increased skills and competencies on energy issues due to the project

Project-End Value	5 years beyond Project-End Value	Unit
150	1,500	Number of people trained

Communication

Please enter the number of stakeholders reached through media and events during the project

Project-End Value	5 years beyond Project-End Value	Unit
10,000	50,000	Number of people

Employment
 Please enter the number of jobs created in FTE

Project-End Value	5 years beyond Project-End Value	Unit
260	15,000	FTE

ANNEX 2

ESTIMATED BUDGET FOR THE ACTION

	Estimated eligible ¹ costs (per budget category)										Estimated EU contribution ²				
	Direct costs								Indirect costs	Total costs	EU contribution to eligible costs			Maximum grant amount ⁶	
	A. Personnel costs			B. Subcontracting costs	C. Purchase costs			D. Other cost categories	E. Indirect costs ³		Funding rate % ⁴	Maximum EU contribution ⁵	Requested EU contribution		
	A.1 Employees (or equivalent)	A.4 SME owners and natural person beneficiaries	A.5 Volunteers	B. Subcontracting	C.1 Travel and subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties	D.2 Land purchase		E. Indirect costs				
	A.2 Natural persons under direct contract														
A.3 Seconded persons															
Forms of funding	Actual costs	Unit costs ⁷	Unit costs ⁷	Actual costs	Actual costs	Actual costs	Actual costs	Actual costs	Actual costs	Flat-rate costs ⁸					
	a1	a3	a4	b	c1	c2	c3	d1a	d2	e = flat-rate * (a1 + a3 + b + c1 + c2 + c3 + d1a)	f = a + b + c + d + e	U	g = f * U%	h	m
1 - JAE	111 413.00	0.00	0.00	0.00	9 000.00	0.00	0.00	0.00	0.00	8 428.91	128 841.91	95	122 399.81	122 399.81	122 399.81
1.1 - JAEG	102 273.00	0.00	0.00	0.00	6 000.00	0.00	0.00	0.00	0.00	7 579.11	115 852.11	95	110 059.50	110 059.50	110 059.50
2 - ESC	299 250.00	0.00	0.00	0.00	12 000.00	0.00	0.00	0.00	0.00	21 787.50	333 037.50	95	316 385.63	316 385.63	316 385.63
3 - VEB	194 750.00	0.00	0.00	0.00	9 000.00	0.00	20 000.00	0.00	0.00	15 662.50	239 412.50	95	227 441.88	227 441.88	227 441.88
4 - SEFA	156 000.00	0.00	0.00	0.00	12 000.00	0.00	33 000.00	0.00	0.00	14 070.00	215 070.00	95	204 316.50	204 316.50	204 316.50
5 - RDA	142 000.00	0.00	0.00	0.00	9 000.00	0.00	23 000.00	0.00	0.00	12 180.00	186 180.00	95	176 871.00	176 871.00	176 871.00
6 - SCN	132 000.00	0.00	0.00	0.00	11 000.00	0.00	23 000.00	0.00	0.00	11 620.00	177 620.00	95	168 739.00	168 739.00	168 739.00
7 - ENER	138 229.00	0.00	0.00	0.00	9 000.00	0.00	23 000.00	0.00	0.00	11 916.03	182 145.03	95	173 037.78	173 037.78	173 037.78
Σ consortium	1 275 915.00	0.00	0.00	0.00	77 000.00	0.00	122 000.00	0.00	0.00	103 244.05	1 578 159.05		1 499 251.10	1 499 251.10	1 499 251.10

¹ See Article 6 for the eligibility conditions. All amounts must be expressed in EUR (see Article 21 for the conversion rules).

² The consortium remains free to decide on a different internal distribution of the EU funding (via the consortium agreement; see Article 7).

³ Indirect costs already covered by an operating grant (received under any EU funding programme) are ineligible (see Article 6.3). Therefore, a beneficiary/affiliated entity that receives an operating grant during the action duration cannot declare indirect costs for the year(s)/reporting period(s) covered by the operating grant, unless they can demonstrate that the operating grant does not cover any costs of the action. This requires specific accounting tools. Please immediately contact us via the EU Funding & Tenders Portal for details.

⁴ See Data Sheet for the funding rate(s).

⁵ This is the theoretical amount of the EU contribution to costs, if the reimbursement rate is applied to all the budgeted costs. This theoretical amount is then capped by the 'maximum grant amount'.

⁶ The 'maximum grant amount' is the maximum grant amount decided by the EU. It normally corresponds to the requested grant, but may be lower.

⁷ See Annex 2a 'Additional information on the estimated budget' for the details (units, cost per unit).

⁸ See Data Sheet for the flat-rate.

ANNEX 2a

ADDITIONAL INFORMATION ON UNIT COSTS AND CONTRIBUTIONS

SME owners/natural person beneficiaries without salary

See [*Additional information on unit costs and contributions \(Annex 2a and 2b\)*](#)

Volunteers

See [*Additional information on unit costs and contributions \(Annex 2a and 2b\)*](#)

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

ENERSAVE CAPITAL SARL (ESC), PIC 907085219, established in RUE NOTRE DAME 31, LUXEMBOURG 2240, Luxembourg,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

VLAAMS ENERGIEBEDRIJF (VEB), PIC 905466774, established in HAVENLAAN 88, Brussel 1000, Belgium,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

SUSTAINABLE ENERGY FINANCE ASSOCIATION (SEFA), PIC 881517571, established in AVENUE KERSBEEK 308, BRUXELLES 1180, Belgium,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

RDA - CLIMATE SOLUTIONS UNIPessoal LDA (RDA), PIC 939071454, established in RUA ANTERO DE QUENTAL 10, OVAR 3880-148, Portugal,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

DIKTYO POLEON GIA TI VIOSIMI ANAPTYXI KAI KYKLIKI OIKONOMIA (SCN), PIC 907509788, established in GOUNARI DIMITRIOU 25, GLYFADA 165 62, Greece,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 3

ACCESSION FORM FOR BENEFICIARIES

ENERGIES RENOVABLES PUBLIQUES DE CATALUNYA SAU (ENER), PIC 880717612,
established in CARRER DEL FOC, 57, BARCELONA 08038, Spain,

hereby agrees

to become beneficiary

in Agreement No 101167708 — LIFE23-CET-CROSSFIT ('the Agreement')

between JOULE ASSETS EUROPE SRL (JAE) and the European Climate, Infrastructure and Environment Executive Agency (CINEA) ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),

and mandates

the coordinator to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 4 LIFE MGA — MULTI + MONO

FINANCIAL STATEMENT FOR [PARTICIPANT NAME] FOR REPORTING PERIOD [NUMBER]															
Eligible ¹ costs (per budget category)											EU contribution ²				
Direct costs									Indirect costs	Total costs	EU contribution to eligible costs			Total requested EU contribution	
A. Personnel costs			B. Subcontracting costs	C. Purchase costs			D. Other cost categories		E. Indirect costs ²		Funding rate % ³	Maximum EU contribution ⁴	Requested EU contribution		
A.1 Employees (or equivalent)	A.4 SME owners and natural person beneficiaries	A.5 Volunteers	B. Subcontracting	C.1 Travel and subsistence	C.2 Equipment	C.3 Other goods, works and services	D.X Financial support to third parties	D.2 Land purchase	E. Indirect costs						
A.2 Natural persons under direct contract															
A.3 Seconded persons															
Forms of funding	Actual costs	Unit costs ⁵	Unit costs ⁵	Actual costs	Actual costs	Actual costs	Actual costs	Actual costs	Actual costs	Flat-rate costs ⁶					
	a1	a3	a4	b	c1	c2	c3	d1a	d2	e = flat-rate * (a1 + a3 + b + c1 + c2 + c3 + d1a)	f = a+b+c+d+e	U	g = f*U%	h	m
XX – [short name beneficiary/affiliated entity]															

Revenues
Income generated by the action
n

The beneficiary/affiliated entity hereby confirms that:

The information provided is complete, reliable and true.

The costs and contributions declared are eligible (see Article 6).

The costs and contributions can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 19, 20 and 25).

For the last reporting period: that all the revenues have been declared (see Article 22).

❶ Please declare all eligible costs and contributions, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Only amounts that were declared in your individual financial statements can be taken into account lateron, in order to replace costs/contributions that are found to be ineligible.

¹ See Article 6 for the eligibility conditions. All amounts must be expressed in EUR (see Article 21 for the conversion rules).

² If you have also received an EU operating grant during this reporting period, you cannot claim indirect costs - unless you can demonstrate that the operating grant does not cover any costs of the action. This requires specific accounting tools. Please contact us immediately via the Funding & Tenders Portal for details.

³ See Data Sheet for the reimbursement rate(s).

⁴ This is the *theoretical* amount of EU contribution to costs that the system calculates automatically (by multiplying the reimbursement rates by the costs declared). The amount you request (in the column 'requested EU contribution') may be less.

⁵ See Annex 2a 'Additional information on the estimated budget' for the details (units, cost per unit).

⁶ See Data Sheet for the flat-rate.

ANNEX 5

SPECIFIC RULES

INTELLECTUAL PROPERTY RIGHTS (IPR) — BACKGROUND AND RESULTS — ACCESS RIGHTS AND RIGHTS OF USE (— ARTICLE 16)

Rights of use of the granting authority on results for information, communication, dissemination and publicity purposes

The granting authority also has the right to exploit non-sensitive results of the action for information, communication, dissemination and publicity purposes, using any of the following modes:

- **use for its own purposes** (in particular, making them available to persons working for the granting authority or any other EU service (including institutions, bodies, offices, agencies, etc.) or EU Member State institution or body; copying or reproducing them in whole or in part, in unlimited numbers; and communication through press information services)
- **distribution to the public** in hard copies, in electronic or digital format, on the internet including social networks, as a downloadable or non-downloadable file
- **editing** or **redrafting** (including shortening, summarising, changing, correcting, cutting, inserting elements (e.g. meta-data, legends or other graphic, visual, audio or text elements extracting parts (e.g. audio or video files), dividing into parts or use in a compilation
- **translation** (including inserting subtitles/dubbing) in all official languages of EU
- **storage** in paper, electronic or other form
- **archiving** in line with applicable document-management rules
- the right to authorise **third parties** to act on its behalf or sub-license to third parties, including if there is licensed background, any of the rights or modes of exploitation set out in this provision
- **processing**, analysing, aggregating the results and **producing derivative works**
- **disseminating** the results in widely accessible databases or indexes (such as through ‘open access’ or ‘open data’ portals or similar repositories, whether free of charge or not.

The beneficiaries must ensure these rights of use for the whole duration they are protected by industrial or intellectual property rights.

If results are subject to moral rights or third party rights (including intellectual property rights or rights of natural persons on their image and voice), the beneficiaries must ensure that they

comply with their obligations under this Agreement (in particular, by obtaining the necessary licences and authorisations from the rights holders concerned).

COMMUNICATION, DISSEMINATION AND VISIBILITY (— ARTICLE 17)

Communication and dissemination plan

The beneficiaries must provide a detailed communication and dissemination plan, setting out the objectives, key messaging, target audiences, communication channels, social media plan, planned budget and relevant indicators for monitoring and evaluation.

Additional communication and dissemination activities

The beneficiaries must engage in the following additional communication and dissemination activities:

- **present the project** (including project summary, coordinator contact details, list of participants, European flag and funding statement and special logo and project results) on the beneficiaries' **websites** or **social media accounts**
- for actions involving equipment, infrastructure or works, display as soon as the work on the action starts a **printed or electronic sign** of appropriate size, with European flag and funding statement and special logo
- upload the public **project results** to the LIFE Project Results platform, available through the Funding & Tenders Portal .

Special logos

Communication activities and infrastructure, equipment or major results funded by the grant must moreover display the following logo:

- the LIFE Programme logo



and

- for projects in Natura 2000 sites or contributing to the integrity of Natura 2020 network: the Natura 2000 logo



SPECIFIC RULES FOR CARRYING OUT THE ACTION (— ARTICLE 18)

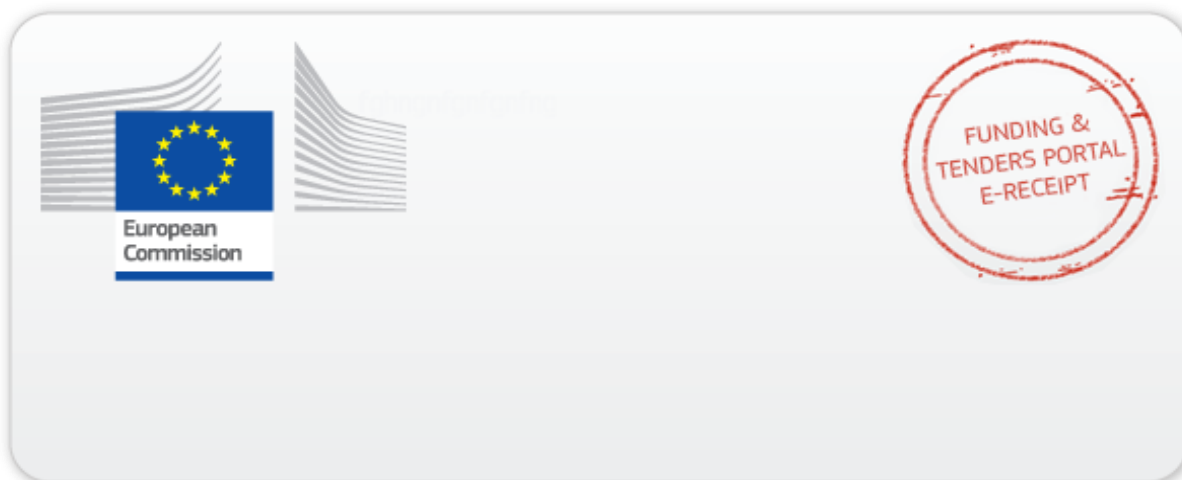
Durability

Unless exempted by the granting authority, beneficiaries of Standard Action Projects, Strategic Nature Projects and Strategic Integrated Projects must commit to continue to use and maintain after the end of the action equipment bought and eligible at full costs, for activities pursuing the action's objectives. Such equipment must be used for these purposes — for at least five years after the end of the action (see Data Sheet, Point 1) or until the end of its economic lifespan (i.e. until it has been fully depreciated) — whichever is earlier.

Specific rules for blending operations

When implementing blending operations, the beneficiaries acknowledge and accept that:

- the grant depends on the approved financing from the Implementing Partner and/or public or private investors for the project
- they must inform the granting authority both about the approval for financing and the financial close — within 15 days
- the payment deadline for the first prefinancing is automatically suspended until the granting authority is informed about the approval for financing
- both actions will be managed and monitored in parallel and in close coordination with the Implementing Partner, in particular:
 - all information, data and documents (including the due diligence by the Implementing Partner and the signed agreement) may be exchanged and may be relied on for the management of the other action (if needed)
 - issues in one action may impact the other (e.g. suspension or termination in one action may lead to suspension also of the other action; termination of the grant will normally suspend and exit from further financing and vice versa, etc.)
- the granting authority may disclose confidential information also to the Implementing Partner.



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