

**FINANCE – FINANCING INSTRUMENTS
TROUGH NATIONAL ASSOCIATION
NETWORKING IN COUNTRIES OF EUROPE**



**Contract No.
EIE/04/021/S07.38558**

Period Covered 01/01/2005 to 31/12/2006

January 07

EVE - Ente Vasco de la Energía
Edificio Albia I
San Vicente, 8 - Plta. 14
E-48001 BILBAO (SPAIN)



The sole responsibility for the content of this [webpage, publication etc.] lies with the authors. It does not represent the opinion of the Community. The European Commission is not responsible for any use that may be made of the information contained therein

CONTENTS

1. BACKGROUND

2. PROJECT OBJECTIVES

3. AGENTS INVOLVED

4. EXPECTED RESULTS IN THE PROPOSAL

5. PROJECT DEVELOPMENT

5.1. WP1. CO-ORDINATION AND PROJECT MANAGEMENT

5.2. WP2. ESTABLISHING A NATIONAL SECRETARIAT

5.3. WP3. COLLECTION AND PUBLICATION ON BEST FINANCING PRACTICES

5.4. WP4. DISSEMINATION (COMMON & SPECIFIC)

6. CONCLUSIONS



1.- BACKGROUND

The aims and objectives of the energy management agencies are to promote RUE and to spread technologies and energy systems based on the development and further use of RES, in order to address energy problems and provide efficient solutions that limit wastage while improving the quality of life and standard of living of citizens and of their regions.

With the SAVE Programmes (1991-1995 and 1996-2002) the European Commission supported the creation of regional and local energy management agencies, oriented towards promoting rational use of energy (RUE) and giving value to local and/or renewable energy sources (RES) and identified this kind of action as an important instrument for the sustainable development of those regions. Regional and local administrations have helped to create and sustain energy agencies in their territories. Thanks to the SAVE Programmes and other national or regional instruments and funds, in a short period of time more than 280 energy management agencies have been created throughout EU member states. Many of the agencies created on the financial bases of the SAVE II Programme signed the *Charter of the Regional and Local Energy Management Agencies in Europe* (the Cork Charter, December 1998) which, in particular, underlines the importance of co-operation between agencies in order to work efficiently and avoid duplication and to become involved and work in perfect synergy at the various levels of administration of the agencies (central government, region, province, county, department, district, municipality, etc.).

The European Commission has further supported this initiative by establishing the **ManagEnergy net** to promote co-operation between local and regional energy agencies through workshops, study tours and online events on energy saving and renewable energy. The creation of **associations of energy agencies** has also been encouraged as an instrument to transmit European and national policies and to exchange good practices and experiences among the agencies.

The main objective of this proposal is to enhance the role of the national associations of agencies, which are the logical channel of communication between the EU, the national administrations, and the agencies themselves. The associations are a service instrument for the agencies, which can get accurate information and help from the organizations of which they are members.

Another key issue of the FINANCE project was to facilitate and exchange between the agencies all the relevant initiatives or practices developed in order to obtain funds and financing for their activities. Good and reliable financing support has been identified as a key issue for the self-sustainability of the agencies. There has been a huge effort to exchange and promote examples of good energy practices amongst agencies, but to make these energy practices a reality, it is necessary to attract investments and obtain reliable financing. FINANCE encouraged the exchange of information and good practices – particularly in relation to financial and economic issues to make the new agencies self-sustainable, transfer know-how from agency managements and of associations where they do not yet exist –helping to create new ones– and producing common products covering the enlarged territory of the Union.



2. PROJECT OBJECTIVES

As can be seen from this report, all the objectives approved for the project have been achieved. However there was also a secondary, more general, objective which it has not been possible to achieve, involving setting up associations of energy agencies in regions or countries where they did not already exist. This objective did not form part of the proposal, since the possibility of achieving it lay outside the scope of the project. From the beginning of the project, as the minutes of the Steering Committee meetings show, there have been countries (e.g. Finland) where there has been no interest in forming such associations, and others where the size of the region makes the creation of such an association unnecessary, given that a predominant energy agency already exists.

To conclude, there can be no doubt that associations of energy agencies have played a very effective role in standardising the work of the various agencies in their area. They also allow smaller, isolated agencies to have a greater voice and play a greater role in decision-making within the association alongside their larger counterparts. Moreover, these small agencies have an opportunity to become full members of different forums with the other agencies, regardless of their size.

In countries where no such association has yet been formed, the FINANCE project has at least helped start a debate amongst these agencies in these countries. which may, in due time, lead to the creation of a body representing all energy agencies in these regions.

The objectives set out in the proposal are listed below. The list sets out the way in which each of the objectives have been successfully achieved.

Project objectives were:

To reinforce the role of the national associations of energy agencies in those countries where they exist, and to establish the basis for creating such associations in countries where they do not yet exist. This is to provide a coordinated network of cooperation between the agencies of a country.

Spain: Reinforcement of the association has been achieved to some extent thanks to the FINANCE project. This was the first major joint project for EnerAgen. The early stages of the project were difficult and on occasions

there was a lack of coordination. Through successive project meetings, the agencies involved in EnerAgen became aware of the need to work together to consolidate the Association.

Finland:

France (FLAME): Reinforcement of the association FLAME has been also achieved to some extent thanks to the FINANCE project. A major FLAME meeting held in Paris in April 2006 the 12th helped all the local energy agencies to define the expectations they had from the national federation. This was also the opportunity to strengthen co-operation actions with RARE as a common programme of exchange of experiences has been defined on different topics such as climate change, agendas 21 at local and regional levels (coherence between both levels) as well as the opportunity for some regional energy agencies to support the setting-up of local energy agencies.

France (RARE): The FINANCE project helped RARE and FLAME to better cooperate on different levels and in different fields (climate change, agendas 21, energy). The common workshop “territorial intelligency” has worked on the identification of the functions of the local and regional agencies in order to look for complementarities between the agencies.

This project has boosted the RARE network and one person was employed to manage the actions of the network and facilitate the exchange between its members.

Greece:

Bulgaria:

The Netherlands:

To improve the day to day work of the energy agencies by means of exchange of information, good practices, common projects, etc within the associations.

Spain: Evidence of this reinforcement of the association can be seen in the fact that the activities of the FINANCE project have led to greater



collaboration in exchange of information among associates. During the meetings some agencies (especially local ones) asked regional agencies for collaboration with publications on energy efficiency. As a result, publications and brochures were transferred making it possible to cut costs in some agencies.

An interesting example of an attempt to develop good cooperation between the local and regional level is Catalonia. At the moment there are five sub-regional energy agencies and two additional ones are in the set up phase. Cooperation on a bilateral level between the local and the regional energy agencies already has a longer history e.g. ICAEN has shares in the local energy agencies of Barcelona, Osona and Tarragona. With the increasing number of agencies it became relevant to set up a regional network for supporting the exchange of information and experience between all the agencies

One of the actions of greatest interest to members of the association was the Best Financing Practices. Many agencies have shown particular interest in these practices and also in having their proposals among the shortlisted BFPs.

Finland:

France (FLAME): It is so clear that exchange of experiences is one of the basic reasons why the association FLAME was created in order to improve the day-to-day work of each local energy agency. Some main topics have been identified such:

- > the administrative management of the agencies;
- > the identification of new financial means to overcome the end of the EU financial support in the framework of the European contract (3 years);
- > the way to improve energy agencies' activities towards targeted groups (general public, local authorities, SMEs, etc.);
- > national on-going and experimental schemes such as "Energy Savings Certificates" (*Certificats d'économie d'énergie*), Carbon Diagnosis (*Bilan Carbone®*), new opened energy markets, etc.

> common actions and topics developed by local energy agencies: sustainable energy and areas development, sustainable mobility and transport, local authorities and energy, sustainable agriculture and wood energy.

4 working groups were set up: all the participants are used to meet twice a year to exchange experiences and find out common actions to be carried out with the support of ADEME.

A forum was also set up on FLAME's web site (www.federation-flame.org) in order to help all the technicians from any local energy agencies to exchange on different themes and existing tools.

France (RARE): the network is organised on two levels:

- the directors of each agencies meet regularly to discuss about the management of their structure: relation with the national and regional institutions (Regional Council, ADEME, DRIRE, DIREN...), staff management, financial inquiries...
- the technicians take part in working groups which meet 2 or 3 times a year. They are currently 6 working groups : sustainable development and agenda 21, communication, energy, climate, environnemental management, transport. Others are in creation : school environmental management, resource center.

The working group on Energy published several technical documents, the last one "quelques hypothèses pour un scénario énergétique de référence dans les régions françaises" is underway. There is also a working group on "wind power energy". In 2005 it published a document on this topic "L'éolien en France : initiatives de concertation et de planification : analyse de 20 cas exemplaires" but actually this group has no work underway.

In 2005, the working groupe "Sustainable Development – Agenda 21" has published a document "Objectif Développement Durable: Comprendre et agir sur son territoire" : returns of experiences and recommandations to implement local agendas 21, advises, technical references, examples, contacts....



The working group “Communication” has initiated a newsletter (in-house to the network) that gives different information : planning of the events of each agency, information on the actions led by the working groups, report of the meetings of the Directors, the network activities and its implication on national and european level .

All these actions have been possible thanks to the employment of the network coordinator in the framework of the Finance project.

Greece:

Portugal:

The Netherlands:

To give the wider public and energy agents easier access to all the available information on energy management produced by local, regional or national energy agencies, by strengthening their associations.

Spain: Numerous steps are being taken to ensure that the information available on energy efficiency and promotion of renewable energy sources reaches all agents on the market. Actions carried out to reach a broad spectrum of the market agents include; courses and working meetings on energy efficiency and RES, the project website and the invitation to SMEs to national attend meetings of the FINANCE project.

The FINANCE project has helped show the Spanish Association EnerAgen the importance of agencies performing common activities as opposed to doing them separately. This is reflected in EnerAgen's activities in 2005 and 2006, which are a result of help and support received from the Project and the EIEA.

France (FLAME): The role FLAME played in disseminating information on sustainable energy is quite reduced as information is widely spread to a wider public throughout the national network of *espaces INFO → ENERGIE* the ADEME set up since 2000. But FLAME tried to reinforce the promotion of sustainable energy amongst institutional and professional organisms and networks such as *l'Association nationale des Maires de France (AMF)*,

l'Association des Regions de France, etc. Some representatives of the Executive Bureau of FLAME attended numerous meetings in order to promote the setting-up of FLAME and try to negotiate technical and financial co-operations on energy topics.

France (RARE):

RARE doesn't directly disseminate information on energy towards public. The demands of information are transferred to the agencies, to national institution (ADEME) or to local organisms specialised in energy (Points Info Energies or local associations).

Occasionnaly, RARE organizes conferences on energy topics open to all kind of public : institutions, enterprises, local actors, individuals.... In December 2006, RARE takes part in Pollutec (Environmental Event, Lyon) and organize one on the theme "Eco-parcs : shared responsibility between elected representatives and enterprises".

RARE is member of the National Commission of Sustainable Development (Commission Nationale du Développement Durable) and of the "Commission Nationale des Aides ADEME" to decide of the financial support granted to the different structures (public or private).

Greece:

Bulgaria:

The Netherlands:

To increase co-operation between the large number of energy agencies throughout Europe, in order to exchange information, good practices, establish common positions, and in particular to enhance co-operation between existing EU members and accession countries.

Spain: Contact has been made with other associations of European energy agencies and we have worked with them on performing a number of activities in the FINANCE project. The associations contacted come mostly from those involved in the SEANCE project. The association's activities on



the back of this collaboration—such as its brochure, contacts for the creation of consortia in the latest calls (EIEA of 31 October), support in organising a study tour to Sweden for Basque policy and decision makers, etc.—demonstrate a reinforcement in the joint actions among European associations and collaborative activities amongst their members. This objective has therefore been achieved.

Bulgaria

Finland

France (FLAME): FLAME systematically does attend all the Mananenergy reflection groups meetings held in Brussels: Maud Leloutre from the Local energy management agency of Ardennes (ALE 08) is in charge of representing FLAME to this European event. She has the responsibility for collecting all the expectations from the local energy agencies. Mananenergy reflection groups meeting became an opportunity for FLAME to exchange experiences with any other European networks and find out co-proposers to share Europe projects.

France (RARE): RARE is member of FEDARENE (European Federation of Regional Energy and Environment Agencies): the first European network of regional and local organisations which implement, co-ordinate and facilitate energy and environment policies. The FEDARENE Président : M. Roger LERON is executive member of RARE and represents the network at the european event. FINANCE project has enabled to work with FLAME, and to establish contact with other european agencies.

Greece

Portugal

The Netherlands:

To get the maximum benefit from the work of each agency and from co-operation among them providing a guide on best financing practices that will include analysis and assessment of the different mechanisms that European agencies can use to be self-sustainable.

Spain. This objective has totally been achieved. On the one hand the energy agencies of Energen have been provided with an executive summary of the results of the ECUBA report on financing and the future of European energy agencies.

As mentioned, this was one of the project's great milestones. This document has aroused very considerable interest and a large number of Spanish agencies have asked us for the result of this study. The results of the Best Financing Practices will be seen shortly, when the agencies start applying the examples. Dissemination of these BFPs has already begun in Spain. At the Second National FINANCE Symposium held in Bilbao, for example, one of the presentations was by the provincial agency of Burgos, which explained its financing arrangement, which is sure to be replicated in the future by other agencies.

Bulgaria

Finland

France (FLAME): This objective has been partly achieved, as financial means can evolve with national and local environment policies and the involvement of local publics and private partners. On the one hand the energy agencies members of FLAME have been provided with an executive summary of the results of the ECUBA report on financing and the future of European energy agencies.

Secondly, during the regular FLAME's meetings, the energy agencies are used to make a presentation of relevant action programmes led locally with a specific focus on the financial means. Discussions are also held in the framework of working groups on specific topics such as:

- > How to increase membership fees and public subsidies from local authorities?
- > Can consultancy studies become part of the energy agencies' activity
- > Etc.

France (RARE): This objective has been partially achieved : the agencies are financed mainly by the Regional Council so the contribution is different



according to the region and its environmental program. The financing practises of the agencies are not consolidated.

The network is financed by the members fees and since 2006 a convention with Ademe (on technical and financing aspects) is in preparation and will be signed in 2007.

Greece

Portugal:

The Netherlands:

To reinforce communication between the European Commission and the Energy Agencies facilitating the inclusion of inputs from the agencies in the EC's strategies and policies.

Spain. Communication between the EC and the associations essentially goes through the Managenergy Refection Group (MERG). Indeed, at least 4 experts who regularly attended the MERG, are also involved in the FINANCE project and therefore act as direct interlocutors between the EC and the associations of energy agencies.

Bulgaria

Finland

France (FLAME): Communication between the EC and FLAME essentially goes through the Managenergy Refection Group (MERG).

France (RARE): Communication between the EC and RARE essentially goes through the FEDARENE (European Federation of Regional Energy and Environment Agencies).

The Netherlands:

Portugal:

A further and general objective, but one which should not be overlooked, is that the above-mentioned objectives can help in achieving European targets on RES and RUE.



3. AGENTS INVOLVED

The key agents who are essential for the proposed action in order to achieve both the project results and the potential impact are obviously the Associations of Energy Agencies. These associations are the best vehicle for speaking on behalf of the energy agencies with governments and also for acting as the forum where those agencies can exchange and share knowledge and better practices on agency management as well as implementing common projects. In countries where the associations already exist (as a legal entity) the activities of the project reinforced the role of the association. In countries where the association is not yet (legally) constituted, the project tried to establish the basis for creating such a figure. Thus one agency from that country assumed the task of coordinating the activities, meetings, etc., in order to establish an *association of energy agencies* by the end of the project, or at least a common collaboration practice between agencies, within a solid network in that country. This coordinator agency always worked in close collaboration with the other agencies in its country.

As regards collaboration with other European associations, the FINANCE consortium contacted ECUBA in order to obtain the results of a survey on the situation of European SAVE Agencies. On the instructions of EC officials, another objective of the FINANCE coordinators is to establish close collaboration with the SEANCE team, (formed by 6 European associations), who are implementing a similar SAVE II project (Comm. reference 4.1031/Z/02-069).

The target groups - for whom the proposed action is directly addressed - are the following:

3.1 European Commission

European Commission (through “ManagEnergy reflection group”), since the associations (those already working and new ones to be created) will maintain a close collaboration and active presence in the managEnergy meetings, as the voice of the associated member agencies.

The European Commission and more specifically the EIEA will be able to influence the project of the project at any time. To some extent, within the framework of the approved proposal, it will be possible to attend to contributions and/or suggestions from the EIEA.

Spain. The European Commission, through the Intelligent Energy for Europe agency, has been kept informed at all times about the progress of the FINANCE project. 6 Meetings had been held with technicians from the EIEA agency, which helped improve and clarify the terms of the project. At these meetings the Commission's experts; Mr. Priit ENOK, Mrs Mari VARHO, Mr. BALD and Mr. Vincent BERRUTTO made helpful contributions and clarifications which have been incorporated into the project.

The EIEA's contributions have been taken into account at all times. Likewise, all of Mr. ENOK's technical notes have been acted upon.

With regard to the relations with the European Commission, several partners in the FINANCE project are also in the MERG (Managenergy Reflection Group).

Bulgaria

Finland

France (FLAME): Sébastien CONTAMINE from Aduhme, representing the vice-president of FLAME, was in charge of the FINANCE project. All the information, documents and discussion went through the co-ordinator of the project EVE. He had also to reinforce the technical co-operation with RARE.

France (RARE): Various persons have taken part in the FINANCE project : Christian Labie from RAEE, Didier Houi from ARPE MP and Ghislaine KAMPETENGA co-ordinator of RARE. All the information, documents and discussion went through the co-ordinator of the project EVE. The co-ordinator has also to reinforce the technical co-operation with FLAME.

Greece

The Netherlands:



3.2 Local and regional administrations & citizens

Spain. The public authorities have given their backing to the aims of the FINANCE project at all times. In the case of Spain, the coordinator INEGA has had support from the office of the Regional Minister for Industry of Galicia, as evidenced by the minister's speech to the First Conference of Energy Agencies – FINANCE held in Santiago de Compostela.

In the case of the other coordinator, EVE, support has been received from the Basque Government's energy director, Mr. Txaber Lezamiz Conde.

Citizens and social partners. Following consolidation of relations with agents and public authorities, it has been decided to extend the scope of the project. For this purpose, participation has been opened up to various social partners, including energy-related SMEs. Numerous SMEs were invited to attend the most recent seminar held in Santiago, either as speakers or as delegates.

In keeping with this policy of opening up the actions of the FINANCE project to a wider public, invitations were sent out to engineering firms, advisors and companies to attend the second national FINANCE symposium held in Bilbao. There are good examples, such as the presentation by a Barcelona company on of its experience in innovative solutions to the problems of mobility in large cities. The presentation was attended by officials from the Basque Government, who immediately contacted the company with a view to implementing their ideas in the Autonomous Community of the Basque Country. This is a therefore a clear example of a success story among the actions of the FINANCE project.

In any case we want to continue working with *Local and regional administrations*, as the associations will continue serving as a communication channel between them (representing the local and regional agencies) and the administrations in charge of elaboration of energy policies, programmes, management, etc.

Bulgaria

Finland

France (FLAME): The main objective of FLAME is to reinforce the co-operation between all the local energy agencies created in the framework of the SAVE programme since 1994. FLAME was not created to carry out action programmes towards final consumers and citizens. But the recently-created federation can negotiate with national partners such as ADEME global action programme with local experimentation: Eco n'home programme is a good example.

The FINANCE project was a genuine opportunity to enlarge the collaboration with the regional agencies network (RARE) and try and to stimulate the involvement of public organisms in the fight against global warming.

France (RARE): RARE is a network of territorial actors. It doesn't intervene directly on the territory but through the technicians of the agencies. FINANCE has enabled to collaborate with local agencies federation (FLAME).

For instance, in the framework of the implementation of Agendas 21 the regional agencies technicians are in direct contact with the local population.

Greece

Portugal

The Netherlands:

3.3 Energy Agencies

Spain. At this point in the project, the energy agencies are fully involved. After certain initial doubts at the beginning of the project, the association can now be said to be really working together and the conditions are now in place to strengthen relations between all of the agencies.

Several new energy agencies have joined the Spanish EnerAgen Association during the FINANCE project. Agencies are also taking a more active role in the association, as evidenced by the preparation of the Association's Business Plan. This document, which is of great importance



for the future of the association, was drawn up jointly, in collaboration, by three energy agencies. This gives some idea of the team work and coordination between the agencies making up the association.

Bulgaria

Finland

France (FLAME): The setting-up of FLAME is a genuine success as all the energy agencies are fully involved. FLAME gets 13 very active energy agencies. 2 recently-created agencies (Grand Nancy and agglomeration de Bordeaux) are about to be integrated into the federation. As it grows up quite quickly, the expectations from the agencies also increase. The new challenge FLAME needs to face is to how to keep a dynamic progression without dedicated personnel? This was one of the main questions aroused during the meeting held in April 2006 in Paris. Most of the energy agencies are not willing to pay for more services provided by FLAME for the moment.

France (RARE): the network counts 11 agencies, 1 has joined the network in 2005 : AREL (Agence Régionale Environnement de Lorraine) and another in 2006 : ARER (Agence Régionale l'Energie de la Réunion). The network is enlarging and is becoming more active.

The network expects to maintain the co-ordinator job and even to re-inforce it.

Greece

Portugal

The Netherlands

4. ANTICIPATED PROJECT RESULTS INDICATED IN THE PROPOSAL

In this point we indicate the level of progress of the project with regard to the deliverables approved in the proposal. A table further down gives a general assessment of the level of progress of the project.

List of expected results

D1 00 Co-ordination and project management (WP1 have no specific deliverables, but we include; project meetings, official project reports, ..etc.)

The work of coordination began from the outset of the project last January. This work was carried out both at the level of the general project and the coordination carried out by each of the regional coordinators. In some cases this internal coordination has led to collaboration agreements being drawn up between the associated agencies that are to carry out the project.

The contractual problems related to participation by agencies in the project required major coordination work. As will be recalled, due to an error in the contract, work carried out by the agencies in the name of their associations was not legally eligible. This posed a major problem, since the associations do not have sufficient staff to carry out FINANCE project actions. It was therefore absolutely necessary to amend the contract to allow for this type of collaboration by the agencies. The issue was finally resolved after the half-way mark of the project had been reached, by means of an amendment to the initial contract.

The progress reports were all sent on time, except for the second intermediate report. The index at the end of this final rest is the one approved by Mr. ENOK, except for point 6, which was considered not to be appropriate, given that the project has been completed.

Meetings of the Steering Committee (SC). three meetings of the committee have been held, all attended by EIEA representatives.



Indeed, some of them were actually held in the EIEA offices. These meetings have proved to be very productive, providing the technical experts from the EIEA with an opportunity to make amendments to technical aspects of the project and add some changes that were not initially in the project, such as the report on the satisfaction questionnaire, and others. The FINANCE partners regularly attended all these SC meetings. Some particular meetings were scheduled to coincide with special events (info-days, managenergy, etc.,) organised by the EIEA and DG TREN in Brussels.

Finally it is important to mention that the coordination of this project has involved a considerable amount of work for EVE. As well as the actual coordination of the international consortium per se, the coordinator has also had to coordinate participation by 11 additional agencies in Spain. This has led to some delays in submitting reports. Not all agencies have submitted their technical or economic inputs in the reports, and cost statements from some agencies are missing.

D2 01 Association Brochure

Spain. Despite the fact that contractual aspects have to some extent affected the progress of the project, the existing delays have gradually been ironed out and there are now no delays with regard to delivery or execution of the deliverables for the project.

In the case of the brochure of the EnerAgen Association, an analysis was first made of the way in which other associations in the SEANCE project had created their brochures. We contacted all of these associations and asked them to send us a brochure. Using the information obtained, we designed a brochure that has proved to be a very useful tool for marketing the association. The use of the format finally adopted has helped communication between the various agencies and we are now studying the possibility of incorporating it onto the project website, so that it can be accessed by any European agent wanted to contact Spanish agencies.

Bulgaria

Finland

France (FLAME): FLAME and RARE decided not to print a common brochure to promote their new co-operation as both of them want to keep their own leaflet. FLAME's existing brochure is available on a "pdf" format and can be downloaded from its website. Common web pages on the two web sites were opened:

For FLAME: <http://www.federation-flame.org/europe.htm>

For RARE: www.rare.asso.fr

Moreover, FLAME and RARE planed to both attend national meetings and events such as the future "Assises Nationales de l'Energie" which will be held in Grenoble in January 2007.

France (RARE): FLAME and RARE have not printed a common brochure to promote their new co-operation as both of them prefer to keep their own leaflet. A RARE's brochure exists, in french and english, and can be downloaded from its website: www.rare.asso.fr

Greece

Portugal.

The Netherlands:

D3 01 European Publication on Best Financing Practices

Spain. This is one of the most important deliverables in the project. EVE prepared the form with the key points set out in the Best Financing Practices. The forms were received throughout 2006. By month 23 of the project, in compliance with the deadlines set out in the proposal, EVE sent out the Spanish BFPs to all partners. As per the guidelines of the SC meeting held in Brussels, approved by Mr. ENOK, these BFPs were finally disseminated through the project website, and have been available since 2006.



Bulgaria

Finland

France (FLAME): This is one of the most important deliverables in the project. A questionnaire translated into French and adapted from the version proposed by EVE was sent to all the local energy agencies. 3 Good Financing Practices were written out in English and presented in an xls format proposed by EVE.

- > **ALECOB:** Sustainable energy actions in a Programmed campaign aiming at improving housings (OPAH) carried out by the Centre-Ouest Bretagne Local community;
- > **Cié:** "Conseil en énergie partagé" (shared energy services) ;
- > **Aduhme:** A demand-side management campaign "10,000 light bulbs for 2000"

France (RARE): the questionnaire, translated in french by FLAME, was sent to all the members of the network. The replies are difficult as the questionnaire appears to be unadapted to the context of the agencies. Only 2 questionnaires returned were considered interesting as representative of the agencies functioning in general: ARER (La Réunion) and ARENE (Ile de France)

Greece

Portugal

The Netherlands:

D4 01 Abstracts including regular updates (as requested from The Commission)

This deliverable has been completed, since at the request of the commission, a questionnaire was completed. This Project Fact Sheet was filled out by EVE and corrected at the request of Mr. ENOK.

D4 02 Project presentations (as requested from The Commission).

No presentation has been requested

D4 03 Presentational material (as requested from The Commission).

No presentation has been requested

D4 04 7 National Conference Meetings

Spain: The “First National Conference of Energy Agencies” held in Santiago de Compostela, was the first of the two national meetings of the FINANCE project.

Bulgaria T

Finland

France (FLAME): Several FLAME meetings and general meeting (Assemblées générales) were held during the FINANCE project. But the main event was the meeting held in April 2006 in Paris.

France (RARE): One meeting in September 2005 in Paris – Topic :Energy

Greece

Portugal

The Netherlands:

D4 05 7 Final National Conference Meetings

Spain. The final project meeting was held in Bilbao 3rd October 2006. (Deliverable Completed)

Bulgaria

Finland

France (FLAME): The final project meeting was held in Rennes in June the 16th.



France (RARE): The final project meeting was held in September 2006 the 26th in Toulouse.

Greece

Portugal.

The Netherlands

D4 06 7 Association Business Plans

Spain: The business plan of the EnerAgen association was drafted by experts from three Spanish energy agencies.

Bulgaria

Finland.

France (FLAME): The FLAME business plan has been written out (French version only available). It is under discussion.

France (RARE): The writing of the RARE business plan is pending.

Greece

Portugal.

The Netherlands

D4 07 Information services to the members of the association

Spain: All the energy agencies in the association receive information on a regular basis. This information service began with the FINANCE project and the dissemination of information on the project itself, a report on the study made by ECUBA for the European Commission, information on European energy programmes, courses organised by the association itself, etc. Such was the success of this type of information that information is now being exchanged in both directions. Previously it was the project coordinators who sent information to the rest of agencies. Today some agencies are

themselves participating in information exchange: ARGEM (Murcia), for example, regularly sends newsletters to all associates to giving information on the various activities it carries out.

The network/association has proved to be a very useful tool for exchanging information among associates. For the case of Spain this objective is considered to have been fully accomplished.

Bulgaria

Finland

France (FLAME): The local energy agencies were used to spend some time during FLAME technical meetings to make a presentation on the last action programmes carried out locally. But as it took too long, the co-ordinator (Agence locale de l'agglomération lyonnaise) proposed to sort out a regular informal letter to make information dissemination easier. 6 FLAME's letters have already been sorted since.

Moreover, in order to exchange documents (administrative files such as association status, PowerPoint presentations, training modules, energy contracts, communication leaflets, etc.), Intranet pages with restricted access were opened on the FLAME's web site.

France (RARE): RARE has its own website. It enables the working groups to exchange regularly on current topics but also documents, experiences.... It has been decided to publish 2 newsletters a year including planning of the events of each agency, information on the actions led by the working groups, report of the meetings of the Directors, the network activities and its implication on national and european level .

Greece

Portugal

The Netherlands:



D4 08 Project web site (hosted by EnerAgen web site)

The project website is now fully operative. The page was very well received by partners, who praised the design and ease of browsing .

The website is also used to make project working documents available at all times. For example, the website contains agency satisfaction surveys on the services offered by the association, which have to be completed by all agencies. It also contains the form on best financial practices, presentations, reports, etc.



At its final meeting in Brussels, the SC, in agreement with Mr. Enok, decided that the website was the best medium for disseminating the project.

5. DEVELOPMENT OF THE PROJECT

5.1. – WP1 Co-ordination and project management

Start date:	January 2005
Duration:	24 months
Leader:	EVE (EnerAgen)

Targets of WP I

- Establishing the co-ordination guidelines for the project
- Associations hold national meetings to prepare and establish the internal procedures to perform their tasks in the project.
- The National Secretariats, co-ordinated by EnerAgen, will establish cooperation links with those networks in order to get the most complete information and dissemination for the project. Steering Committee.
- A **specific questionnaire** will be produced in order to obtain the opinion and degree of satisfaction of the agencies belonging to the association.

Description of the work carried out.

Spain

The targets of the WP, as established in the proposal, are reviewed below.

The general guidelines for **coordination of the project** have been established. This is evidenced by the fact that despite the uncertainties that arose regarding the amendment to the contract, the project has continued to progress well. Deadlines for handing in reports and deliverables have continued to be met and the project objectives have already been accomplished.



EVE (Ente Vasco de la Energía), as the coordinator of the project has made a huge effort to ensure the success of the project. This effort has gone even further than the commitments made to the European Commission and EnerAgen.

With regard to the **national and association meetings**, the coordinators of FINANCE have been present at the assemblies and board meetings of EnerAgen. As a result, coordination between the actions of the association and those of the FINANCE project has been maintained at all times. Throughout the term of the project more than 5 project meetings have been held.



Eneragen
Asociación de Agencias Españolas de Gestión de la Energía

Estimados compañeros,

Dentro de las actividades incluidas en el proyecto **FINANCE** (Financing Instruments Through National Association Networking in Countries Of Europe), en el cual participa **EnerAgen** junto con otras asociaciones europeas, se ha decidido realizar una encuesta orientada a conocer las necesidades de cada uno de sus socios, sus opiniones, percepciones y sugerencias, todo ello con el objetivo de ayudar en la planificación de las próximas actividades a realizar desde la asociación.

Para facilitar esta valoración, a continuación se exponen algunos puntos en los que como socio podrá hacer llegar sus comentarios.

Las preguntas tienen un carácter abierto para poder recoger el mayor número de sugerencias posible, sin embargo, habrá aspectos que no estén incluidos y sobre los cuales quiera realizar un comentario, en ese caso, no dude en incluirlo.

Su respuesta es muy valiosa para ofrecer el servicio que cada agencia necesita. Muchas gracias por su coloración.

I.- DATOS IDENTIFICATIVOS DE LA AGENCIA.

NOMBRE DE LA AGENCIA:		
ÁMBITO TERRITORIAL: (NACIONAL, REGIONAL O LOCAL)		
NÚMERO DE TRABAJADORES:		
FECHA DE CONSTITUCIÓN:		
FECHA DE INCORPORACIÓN A LA ASOCIACIÓN:		
PERSONA DE CONTACTO	NOMBRE Y APELLIDOS	
	CARGO:	
	Nº DE TELÉFONO:	
	Nº DE FAX:	
DIRECCIÓN CORREO ELECTRÓNICO:		

Relations with other networks / associations. The coordinator of FINANCE has worked with other associations such as the associations of energy agencies in Germany, Italy and the United Kingdom. This collaboration involved the development of the association's brochure.

Survey. The survey of satisfaction of energy agencies was carried out by the coordinators of the project, EVE and Inega. This questionnaire was translated and sent to the technical officer Mr. Priit Enok, who approved it. At the current stage of the project, the situation of the survey is as follows.

The completed survey form has been returned by all the Spanish partners. We are currently analysing the survey results and proceeding to make any necessary improvements to the questionnaire. Once all the questionnaires were received, INEGA took charge of analysing them.

Training is considered an important factor, and the agencies expect EnerAgen to provide different types of courses depending on their needs, which will allow

them to update their knowledge, above all with respect to issues for which it is usually difficult to find training opportunities.

Approximately 70% of those surveyed think that EnerAgen should participate in events and conferences, as opposed to 30% who disagree. Among those agencies who are in favour, there are various opinions as to the type of events EnerAgen should take part in; the following are the most noteworthy:

- Strengthen the presence of EnerAgen abroad.
- Information Sessions regarding European or national aids.
- Presenting new projects.
- Information or Technical Sessions.
- Technical Conferences regarding Energy Saving and Renewable Energies.
- For all the events carried out by the EnerAgen members
- Workshops for the agencies to exchange experiences.
- For any national or international event related to the sector.
- Increase lobbying on behalf of the association, above all with respect to renewables and prioritising renewables.

For the question: What other areas do you think the Association should participate or carry out activities in?

The comments and suggestions put forward with regard to the other aspects which EnerAgen should carry out activities or participate in, are the following:

- Activities involving as many members as possible.
- Preparation of state legislation and programmes in the field of energy and environment which are relevant to the agencies.
- National and international conferences, fairs and related events.
- At acts and events organised by the members of the agencies.
- Encouraging the exchange of the experiences and knowledge of the activities organised by the agencies.
- Forums about energy issues.
- The association should intervene with joint proposals when negotiating new legislation or modifying current legislation.



- A more active role as a “pressure” organism in the field of renewable energy and prioritising renewables.
- Participation in activities organised by similar associations from other countries.
- Representing all (or almost all) of the agencies.

The questionnaire is available on the project website for downloading. The CD-ROM enclosed with this report also includes a complete report named “**Report Questionnaire Spain**” of the survey in Spanish and English.

Bulgaria

Finland

France (FLAME):

- > **Establishing the co-ordination guidelines for the project:** Aduhme, the local energy management agencies – Clermont-Ferrand, was in charge of the technical co-ordination between local energy management agencies and has a special role to play in the general co-operation with RARE. The French co-ordinator had elaborated and written out a guideline (in French) to better help all local energy agencies to get involved into the FINANCE project.
- > **Associations hold national meetings to prepare and establish the internal procedures to perform their tasks in the project:** the whole work programme presenting the tasks to be carried out was presented and discussed during the following national meetings:
 - ✘ **27/01/2006:** Annual technical meeting held during the “*Assises nationales de l’énergie*” in Dunkerque;
 - ✘ **12/04/2006:** Meeting held in Paris to discuss the main expectations and needs from the local energy agencies regarding FLAME federation and relationships with RARE;
 - ✘ **15/06/06:** Annual general Assembly held in Rennes gathering all presidents and directors of local energy agencies members of FLAME;
 - ✘ **25/09/06:** meeting between RARE and FLAME held in Toulouse to discuss the future co-operation.

- > The National Secretariats, co-ordinated by EnerAgen, will establish cooperation links with those networks in order to get the most complete information and dissemination for the project. Steering Committee.

- > A **specific questionnaire** will be produced in order to obtain the opinion and degree of satisfaction of the agencies belonging to the association. The questionnaire proposed by EVE was translated into French and sent to the whole local energy agencies. 5 questionnaires were return to Aduhme for analysis: all other energy agencies who did not send back the questionnaire duly filled in were contacted by Aduhme to get their opinion concerning their own expectations and needs from FLAME and a closer co-operation with RARE and its members. Most of the interviewed people confirmed the fact that the proposed questionnaire was not properly adapted and that there was a genuine demand for discussions and debate on FLAME and its objectives. The meeting held in Paris in April 2006 (the 12th) was the very-first opportunity to have a deep discussion on the main objectives of the recently-created federation as well as the personal expectations from each energy agencies. The whole members did agree that there was a genuine need for:
 - ✘ exchanging experiences, tools and methodologies;
 - ✘ carrying out common projects on the areas covered by some energy agencies (Eco n'Home project for instance);
 - ✘ strengthening partnerships with existing networks and associations such CLER (*Comité de liaison pour les énergies renouvelables*), AMORCE, Energie-Cités, etc.
 - ✘ promoting the role of energy agencies acting at local level in collaboration with ADEME regional department and regional environment agencies...

... but most of them were quite frightened by loosing the control of the federation in the case of recruiting employees who would be in charge of the co-ordination of all the members in the framework of FLAME. Meanwhile, it appears that there is clearly a need of a reinforced co-ordination between energy agencies regarding for instance the action programme planed with ADEME.

France (RARE)

- > **Establishing the co-ordination guidelines for the project:** A co-ordinator was engaged to manage the relations between the regional energy management agencies and has a special role to play in the general co-operation with FLAME. The co-ordinator transmitted all the informations and documents related to FINANCE to the regional energy agencies to get them involved into the project.



- > **Associations hold national meetings to prepare and establish the internal procedures to perform their tasks in the project:** the whole work programme presenting the tasks to be carried out was presented and discussed during the following national meetings:
 - ✘ **15&16/09/2005:** Annual general meeting held in Paris
 - ✘ **12/04/2006:** Meeting held in Paris to discuss the main expectations and needs from the local energy agencies regarding FLAME federation and relationships with RARE;
 - ✘ **25/09/06:** annual general meeting between RARE and FLAME held in Toulouse to discuss the future co-operation.
 - ✘ **01/12/06:** Annual general Assembly held in Lyon gathering all presidents and directors of regional energy agencies members of RARE

- > The National Secretariats, co-ordinated by EnerAgen, will establish cooperation links with those networks in order to get the most complete information and dissemination for the project. Steering Committee.

- > A **specific questionnaire** will be produced in order to obtain the opinion and degree of satisfaction of the agencies belonging to the association. The questionnaire proposed by EVE was translated into French and sent to the whole regional energy agencies. 4 questionnaires were return to RARE for analysis. The co-ordinator of the network has contacted some energy agencies who did not send back the questionnaire duly filled but they answered the questionnaire was not adapted. They confirmed the importance of the RARE network and the cooperation with FLAME. New topics have been identified for new potential working groups : Observatory of waste, the making up of survey for european financing, the certificate for energy savings. The function of the co-ordinator was recognized as essential for the life of the network.

Greece

Portugal

The Netherlands:

Outcome

D1 01 *Progress, interim and Final Reports*

D1 02 Specific questionnaire

D1 03 Questionnaire to agencies' report



5.2. – WP2. Establishing a national secretariat

Start date:	January 2005
Duration:	12 months
Leader:	EVE (EnerAgen)

Targets of Phase II

- To establish a **National Secretariat** office in each of the countries taking part in the project, in order to facilitate the work of the associations/networks and to act co-ordinately within all the agencies taking part in them. These national secretariats are in charge of gathering all information and making it available, in the proper format and content, to exchange it with the rest of partners and spread it to the target groups of the project.
- **Association Brochure** (or other agencies' information material) in the form of a leaflet presenting the members, aims, objectives, contact points, and secretariat contact for each association

Description of the work carried out

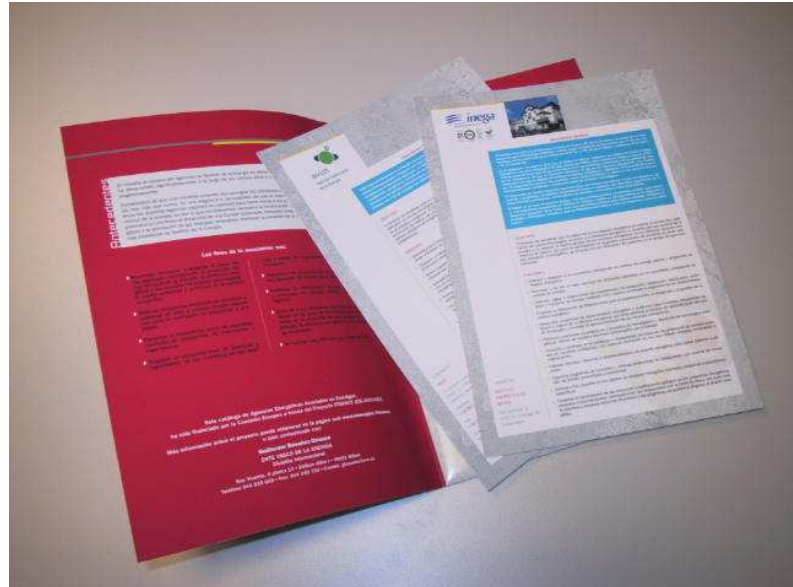
Spain

The National Secretariat was established to be developed by EVE.

Responsibility for the association's brochure was assigned to EVE as the coordinator of the project. The project tasks began when we contacted other European associations and studied the way they presented their brochures. One common feature of all the brochures is that they are practical, since the main aim is to show the agencies what activities have been carried out and give the contact names in the different agencies. However one shortfall that was detected in the brochures studied was the lack of a sufficiently attractive design which would boost marketing of the association outside the partners themselves. It is important to note that the association needs to be publicised not only among agents in the sector (energy agencies) but among all those operating in the market. As a result, it was decided to adopt as attractive a

format as possible, without losing sight of the essential aim, which is for the brochure to be practical and useful.

After making an initial model of the brochure, all the associates were asked for the necessary information to be included in it. After several months of adjustments the result has been very satisfactory and can be seen in the document enclosed with this report.



The association accepts that the deliverable is very useful and that given its design it will serve for different actions by the association and as a document which can be delivered to national and international agents, since it has been published in Spanish and English.

This action is considered to have been concluded. However we are currently studying the possibility of incorporating the association's brochure onto the project website so that it will be available and updated at all times.

Bulgaria

Finland

France (FLAME and RARE):

- > To establish a **National Secretariat** office in each of the countries taking part in the project, in order to facilitate the work of the associations/networks and to act co-ordinately within all the agencies taking part in them. These national secretariats are in charge of gathering all information and making it available, in the proper format and content, to exchange it with the rest of partners and spread it to the target



groups of the project: the project of national secretariat was discussed by both networks. RARE and FLAME did agree that it would have been difficult to set up a common association gathering both existing networks. The main reason was that creating a new association would have not helped make it easy to understand the global situation as there are already many networks aiming at promoting energy efficiency and renewables. The idea of national secretariat has turned into a project of clear co-operation between both existing networks instead of the creation of a new association. Moreover, the second reason is the fact that setting up an official association generates administrative tasks (and expenses) whereas all the agencies are claiming for more and more flexibility. Therefore, RARE and FLAME decided to meet twice a year at least at the occasion of each other's annual general assembly.

> **Association Brochure** (or other agencies' information material) in the form of a leaflet presenting the members, aims, objectives, contact points, and secretariat contact for each association: Finally, RARE and FLAME decided not to print out a new brochure as:

- ✘ Both networks already have their own brochure;
- ✘ FLAME is used to print out an updated version of its presenting brochure every 2 years as the number of created energy agencies regularly increases;
- ✘ Both networks have their own website...
- ✘ Therefore, RARE and FLAME decided to get common Internet pages describing the developed co-operation and future common projects and actions. (FLAME: www.federation-flame.org) (RARE: www.rare.asso.fr)



Greece

Portugal

The Netherlands:

Outcome

D2 01 National Secretariat

D2 02 Association Brochure



5.3. – WP3. Collection and Publication on best financing practices

Start date:	March 2005
Duration:	19 months
Leader:	EVE (EnerAgen)

Targets of Phase III

- To report to its national secretariat a hard analysis of its internal financial procedures, examples of successful financial mechanisms that they have followed and any other useful information to be shared with other agencies.

Description of the work carried out

Spain

EVE (coordinator of the project) was assigned the task of creating a form showing the Best Financing Practices (BFPs) to be found in the different energy agencies throughout Europe.

Financial experts from EVE and officers from the FINANCE project met to create a form that would overcome the difficulties considered. The first problem was the lack of uniformity among the various types of energy agencies. These range from large agencies with shareholdings in diverse energy companies and large budgets to small local agencies with much more limited resources. As a result, the first task was to find a balance and a form that would allow any type of energy agency to respond to the questions, while at the same time providing sufficient information.

Following initial trials of the multiple choice format, it became clear that the difficulties lay not so much in finding exemplary financial practices for energy agencies but in the real usefulness of these, and in the possibility that these best practices could be replicated in the different energy agencies. In other words, despite the fact that it is recognised that a certain type of financing applied to the energy agencies could be novel or catalogued as a best practice, many of the energy agencies (and especially the local agencies) cannot

“escape” from a specific method of financing imposed on them by their owners. This is the situation of the local agencies, most of whom are financed through municipal budgets.

For this reason, it was decided to include a new section in the form. “Best Financial Practices in Projects”. These practices can be replicated by all agencies, since it is common practice for all them to execute projects.

The BFPs were written in a common, user-friendly format (Excel) for all agencies. At the time of writing this report, more than half of cases for Spain have been received.

Once they have all been received, the best ones were selected. It was decided to select two cases per country and to draw up a document with the practices selected which would be posted on the project website. www.eneragen.org/finance

The enclosed CD-ROM contains the files with the BFPs in English and Spanish. These files are also available on the project website.

The Best Financing Practices selected in the two categories are set out below. The reasons that have led the experts to select each one are also given.

2.1.- BEST FINANCING PRACTICES FOR ENERGY AGENCIES.

As was expected before the survey began, no great examples of financing for energy agencies have been encountered. In most cases, energy agencies are publicly “owned”, and therefore have a pre-ordained means of financing. In these conditions agencies are unable to “escape” from their financing arrangement. On a positive note, it should be noted that an increasing number of agencies are participating in European projects, thus on the one hand establishing contacts and know-how from other European agencies, while at the same time diversifying somewhat their sources of financing. This gives them some degree of budgetary independence and improves their image among society and their proprietors (the public authorities).

Financing of the provincial agency of Burgos This BFP was considered to be of interest for a number of reasons. Like many agencies throughout Europe, the agency was created through the European Commission's



SAVE Programme. The selectors also stressed the fact that the management-consultation bodies of the agency include a number of players from the energy market in the province, meaning that all agents are represented in one way or another.

The agency contains different figures:

The **collaborating partners**. These partners do not directly provide financing but help the agency from a technical point of view and with its relations with the community in their area of activity. These partners range from universities to trade unions.

Another even more important figure is that of the **partners**. The partners provide the economic contribution on which the agency survives and also form the managing board of the energy agency. The partners of the Burgos provincial agency include the provincial government of Burgos, the municipal authorities and even more interestingly, the provincial savings banks. Savings banks in theory have different goals to conventional banks, and can devote larger amounts of resources to what is termed “social work”. This social work is targeted at young people, the elderly, the arts, etc and perfectly complements the aims of any energy agency, such as achieving sustainable development.

As well as providing resources for financing the agency, the presence of financial institutions among the agency's partners allows lines of financing to be developed for energy projects in areas of energy efficiency and renewable energy. The agency thus acts as a trail blazer for other private energy projects which can be financed by these savings banks.

2.2 FINANCING OF ENERGY PROJECTS

This second point was not included in the initial proposal for the FINANCE project submitted, which merely stated that the financing arrangements of the energy agencies would be studied. This point arose as a result of an issue detected with regard to financing in the agencies. On most occasions, the agency is not free to choose its financing methods, but it does have greater freedom with regard to the way its energy projects are financed.

Because of this, the energy agencies were asked what project financing methods they considered to be of interest, regardless of the project in question. The agencies consulted were asked to take into account only the financing arrangement and not the project in itself.

As a result, two arrangements were selected:

✓ **Third Party Financing (TPF) from the IDAE**

Third Party Financing is considered to be a best financing practice. TPF has great advantages for companies wishing to implement an EE or RES project, since the technological and financial risks are borne by IDAE, facilitating access to new technologies without increasing the risks. There is no need for initial outlay by the user. Since IDAE began its TPF activities, it has implemented 226 projects, representing total investment of €550m. In 2004, IDAE won the "Grand Prize" of the Commission's "Renewable Energy Campaign for Take Off" for its TPF activities. The EU project REACT (Renewable Action) related to the benchmarking of European best practices, rated this practice very highly for the promotion of RES in the three main energy markets - thermal, electric and biofuel.

✓ **Financing arrangement for an associated regasification and combined-cycle plant**, undertaken by **EVE, Ente Vasco de la Energía**.

This was selected because it involved the financing of a large-scale project, in which the agency sought alternative sources of financing that would not jeopardise its financial balance.

Bulgaria

Finland

France (FLAME): the questionnaire proposed by EVE was quite difficult to be adapted to the French financial scheme as most of the energy agencies get public subsidies to carry out action programmes in the framework of the public service. Even if some of them are currently developing consultancies in order to afford their non-lucrative activity, the provision of invoiced services are quite reduced in the local energy agencies' turnovers. The questionnaire was nevertheless and yet translated into French to increase the number of returned questionnaire: only 3 questionnaires were sent back:

- ✘ **ALECOB:** Sustainable energy actions in a Programmed campaign aiming at improving housings (OPAH) carried out by the Centre-Ouest Bretagne Local community. The main objectives of this campaign are to: improve global quality of housings, make the owners invest in better energy efficient housing, reduce energy service charges and promote renewables.



- ✘ **Clé:** "Conseil en énergie partagé" (shared energy services). The setting up of a "Conseil en énergie partagé" (CEP) is a service proposed by the local energy management agencies located in the Brittany region to all the local authorities.

The main objective of this brand-new service is to share an expert in energy whose main tasks are: - to improve the management of the energy consumption (follow up of the energy furniture invoices, analysis of the maintenance contracts, etc.); - to reduce the energy consumption; - to raise awareness towards municipal consumers and actors (elected people and municipal technicians): training sessions and technical expertise on new areas development/improvement.

The cost of the CEP is based on an annual membership fee paid by the local authority as the local management energy agencies are non-lucrative association (1,03 €/inhabitant).

The main advantages for the local authorities to subscribe to a CEP service is: - to get access to a high-quality and neutral expertise in energy and the exchange of experiences throughout the regional network of local authorities that subscribe to the CEP service; - to benefit from a technical advice that will help elected people to make the right choice in terms of fight against climate change; - to reduce the energy consumption (and expenses) in order to reduce CO2 emissions.

- ✘ **Aduhme:** A demand-side management campaign: "10'000 light bulbs for 2000". The primary objective of this campaign was to inform domestic consumers living in the Clermont-Ferrand area of the advantages of energy-saving light bulbs. These light bulbs last 8 to 10 times longer than conventional light bulbs, and consume 4 to 5 times less energy. There is, unfortunately, one drawback: price. Although on sale in the usual outlets (superstores, DIY centres) their retail price – around € 15 – is prohibitive. PHILIPS Eclairage joined the scheme and, as part of the promotional campaign, offered special discounts on the price of the bulbs: € 4.25 and € 5.85 for the 14 W and 18 W bulbs respectively. The local PHILIPS distribution network was also recruited as a partner in the scheme, and a good number of superstores and DIY centres where PHILIPS energy-saving light bulbs are on sale also joined the scheme. The partners in the scheme wanted the campaign to have a strong social dimension, allowing the most disadvantaged households to gain access to the light bulbs and make significant savings. Bulbs were distributed freely to households that receive social assistance for their energy bills. Some territorial authorities were requested to bear the cost of purchase of the bulbs and their distribution to

needy households, under supervision of their local social welfare / services centre.

France (RARE): the questionnaire was quite difficult to be adapted to the French financial scheme as most of the energy agencies are financed essentially by public subsidies and carry out action programmes in the framework of the public service. The questionnaire was nevertheless and yet translated into French to increase the number of returned questionnaire. Two questionnaires returned were very interesting for their financing practices : ARER Réunion and ARENE Ile de France.

- ARER : It aims to promote and develop the actions tending to save energy, to use Renewable Energies and to preserve the energy resources. This agency benefits from different types of financing : 85% public (40% Regional Council, 10% national administration, 30% local administration, 5% Europe) and 15% private. This type of financing requires a diversity of actions and positive results. It represents a challenge for the agency to maintain that level of financing.
- ARENE IdF: (Regional Agency for the Environment and New Energies), set up in 1994, is a body working in partnership with the Regional Council. By contributing to the integration of environment and energy matters it takes part in sustainable development implementation in Ile-de-France. This agency has specific financing: 98% public (96% Regional Council, 2% Europe) and 2% private. The agency has signed a triennial convention with the Regional Council to assure his stability and solvability.

We have also selected 3 BPF of projects implemented by RAEE (Rhône-Alpes Environment and Energy) :

- **Project 1: Ecole de La Garenne: renovation of the heating installation via leasing agreement**

During the first season of heating, the energy saving was 30 % - greater than the guaranteed forecast figure of 26 %. The gain was shared between the Municipality of Bron and ESYS-MONTENAY (collate previous explanation).

After 12 years of operation, the average energy saving equals the guaranteed figure and the forecast annual financial saving has been reached.

The renovation of the 3 furnaces also reduced NO₂ emissions by 60 %.

The general opinion is that this has been a highly positive experience. The solution of leasing enabled renovation of the heating installation without any investment by the Municipality of Bron and without any extra operation budget.

- **Project 2: Operating and maintenance contract for collective central heating**



The general idea of the energy policy of OPAC 38 is to improve the quality of service for the customers (the renters), without increasing the costs (that is the sum of the rent and of the service and maintenance charges).

Operating and maintenance contracts are implemented for all the collective central heating systems. If sanitary hot water is heated with the collective boiler, it is also included in the contract.

For year 2004, considering the climatic conditions, the target value was an energy consumption of 101,8 GWh for 8905 dwellings. The actual value has been 97,8 GWh. This represents 3,77 M€ for energy procurement, and 0,56 M€ for operating and maintenance. The financial savings have reached an amount of 58 k€.

▪ **Project 3: Renovation of High schools of the Rhône-Alpes Region**

The objective of the policy of investment in energy saving was to set up sufficient material conditions necessary for the high schools to fulfil their education service, but also minimise the costs of this service.

The work involved buildings, heating installations, BTM, controllers, and electrical installations. SINERG ensured the financing of all of the work with a maximum return period of 5 years. It carried out the programme of works decided by the Region and the high school, by handling the realisation studies, organising consultation with companies, placing work orders, ensuring payment and reception (SINERG was the Region's mandated agent).

The objectives of this operation were globally achieved. In 1991, energy saving reached 4,920 tep, and FF 22 million (€ 3.3 million). The forecast global savings were 18.5 % in quantity and 24.5 % in cash. Effective savings were 15.4 % in quantity and 23.4 % in cash.

The results are very positive, as all of the objectives have been attained: Financing by energy savings, Support for local activity through studies, the works, energy supply (wood industry) and maintenance.

More information on these projects are available on the site <http://www.rare.asso.fr>

Greece

Portugal

The Netherlands:

Outcome

D3 01 European Publication on Best Financing Practices



5.3. – WP4. Dissemination (common & specific)

Start date:	January 2005
Duration:	24 months
Leader:	EVE (EnerAgen)

Targets of Phase IV

Spreading and dissemination of all the activities and information produced by the project team will be a key point for FINANCE.

Common dissemination activities:

- *Task 1:* Managenergy activities
- *Task 2:* Participation at contractors' meetings and conferences in association with the EIE and other relevant programmes, EU-wide exhibitions, etc.
- *Task 3:* Contribution to the preparation of common presentation material related to EIE actions.

Specific dissemination activities:

- Task 1: **national conferences/meetings** and a final international conference meeting.
- Task 2: **Business Plan:** each association will develop a **Business Plan** adapted to their own situation, studying at least the following aspects: financing of the association (quota system, subsidies from governments ...), annual action plan, strategic plan (position of the association as regards national and EU policies), training courses, dissemination activities, common projects, services to the members.
- Task 3: **Dissemination within the energy agencies:** dissemination of the services rendered to the agencies
- Task 4: **Project web site**

Description of the work carried out

Spain

Common dissemination activities: Managenergy activities and others. The dissemination actions assigned under ManagEnergy and the presentation of the commission's programmes and activities among associates have been satisfactorily carried out. Mr. Guillermo Basañez-Unanue has participated at various meetings of MERG and presented the activities of the EIE at various forums (the board of directors of EnerAgen).

National conferences/meetings and a final international conference meeting.

The "First National Conference of Energy Agencies" held in Santiago de Compostela, was the first of the two national meetings of the FINANCE project. Before this the general assemblies and work meetings of EnerAgen had been used to establish the necessary relations for the proper functioning of the project. At these preliminary meetings, the project and aims were presented and linking problems facing agencies in achieving well-coordinated work were discussed.

With the coordinated work of the agencies assured, it was possible to extend the objectives of the national conference and thus re-orient the symposium. It was decided to open participation at the symposium to other players on the energy market, and it was noted that there was great interest among delegates.

The enclosed CD-Rom contains more information on the symposium.

The second national FINANCE conference was held in Bilbao on 3 October 2006, to coincide with the PROMA international environment fair, in the same venue as the event, the BEC (Bilbao Exhibition Centre).

In keeping with the project's spirit of "best practice" this second meeting was intended to be practical in nature. Actions (in areas of energy, energy management etc.), and models were presented which might be of help and inspiration to all. A call was sent out to all agencies interested in presenting activities they thought might be of interest to other agencies and other energy agents.



The idea was that the energy agencies should present their “achievements”, or best practices to the other agencies participating at the event. The range of themes covered at the symposium was also open to presentations by other energy agents (technicians, fitters, companies , etc.). Two features were particularly important : the fact that the audience and speakers included private agents (*Josep Sala Manager Catalunya Carsharing – Avancar “Carsharing, Avancar's experience in Catalonia” and Maria Soledad Molinuevo, Senior from Deloitte's Area of Regulation & Public Affairs Financing Arrangements for Energy Projects*).

The symposium was moderated by Mr. Guillermo Basañez-Unanue and attended by Mr. Gonzalo Molina Igartua who gave an interesting presentation on the role of associations of energy agencies in Europe.

Participants included representatives from several departments of the Basque Government (including the departments of energy, industry and transport). The symposium was attended by nearly 100 people.

Business Plan:

At this time it is at an advanced stage and a work group has been set up between the agency in charge of execution, INEGA, and those responsible from EnerAgen.

Página Web del proyecto: Completed and operative since the beginning of the project. The project's working documents and deliverables have been posted on the site. The website has been developed, with improvements and updates introduced as a result of changes throughout the project.

Bulgaria

Finland

France (FLAME):

> **Task 1: “national conferences/meetings”** and a final international conference meeting: the whole work programme presenting the tasks to be carried out was presented and discussed during the following national meetings:

- ✘ **27/01/2006:** Annual technical meeting held during the “Assises nationales de l'énergie” in Dunkerque;

- ✘ **12/04/2006:** Meeting held in Paris to discuss the main expectations and needs from the local energy agencies regarding FLAME federation and relationships with RARE;
- ✘ **15/06/06:** Annual general Assembly held in Rennes gathering all presidents and directors of local energy agencies members of FLAME;
- ✘ **25/09/06:** meeting between RARE and FLAME held in Toulouse to discuss the future co-operation.
- ✘ **NOTA:** all the memos (only available in French) can be downloaded from FLAME's Intranet.

> **Task 2 “Business Plan”** each association will develop a **Business Plan** adapted to their own situation, studying at least the following aspects: financing of the association (quota system, subsidies from governments ...), annual action plan, strategic plan (position of the association as regards national and EU policies), training courses, dissemination activities, common projects, services to the members: A business plan for FLAME has been elaborated. It is currently under discussion amongst all the presidents chairing the members of FLAME. Here are the main financial contributions identified:

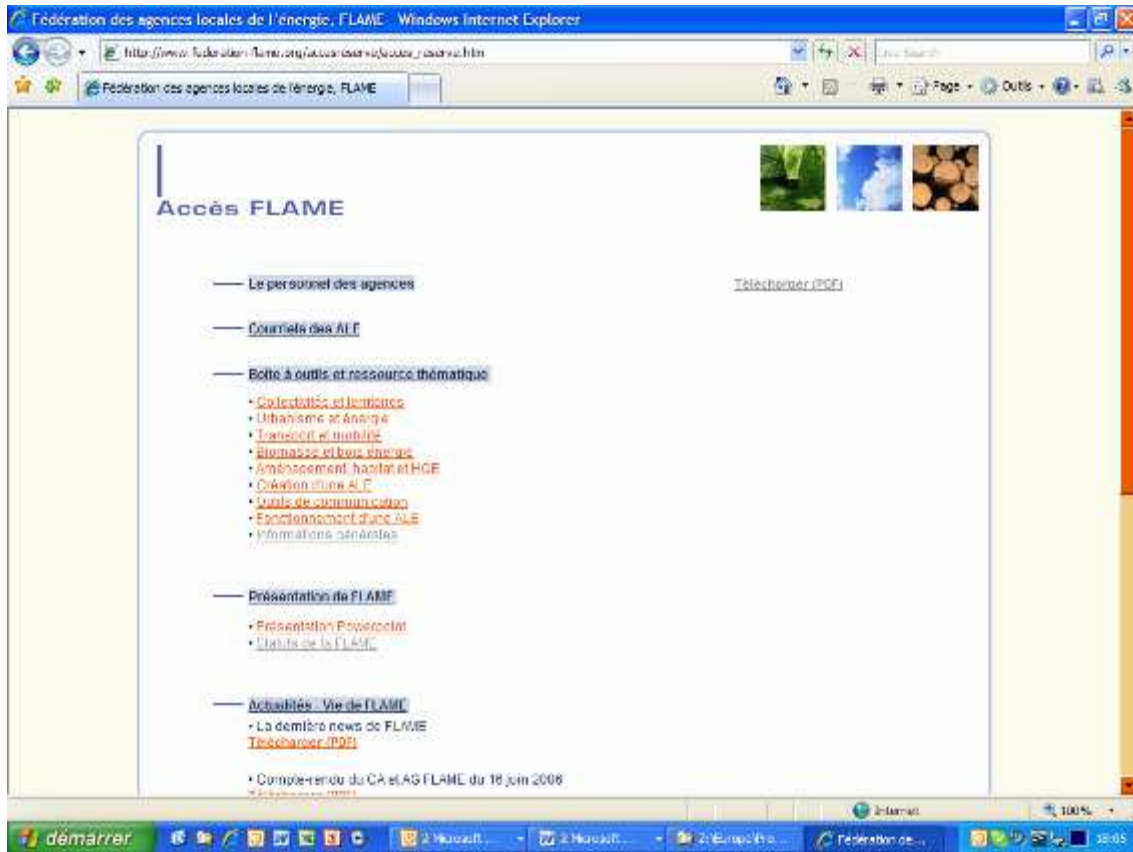
- ✘ The membership fees for FLAME have been changed since last Administration Board (16th of June 2006) meeting: fees can move from € 500 to € 750 and € 1,000 depending on energy agencies' annual turnover;
- ✘ Try and increase the financial contribution from ADEME in the framework of the annual contract; FLAME managed to get some warrantee concerning the financial support from ADEME. As a matter of fact, the national agency has totally understood the role played by the local energy agency as a relay of national policies.

Years	Total amount of the contract ADEME-FLAME	Financial contribution from ADEME	% ADEME
2002-2003	€ 71 082,74	€ 51 890,40	73,00%
2004	€ 115 003,54	€ 65 000,00	56,52%
2005	€ 214 446,95	€ 95 000,00	44,30%
2006	€ 142 000,00	€ 55 000,00	38,73%

- ✘ Question regarding sponsoring contributions from energy suppliers such as *EDF* or *Gaz de France* is still under discussion;
 - ✘ Direct Financial contribution from Europe? It means that FLAME need to get its own personnel. Still under discussion.
- > **Task 3 “Dissemination within the energy agencies”** dissemination of the services rendered to the agencies: As mentioned above, internal 3-month newsletters are regularly written out by all the energy agencies, converted into a pdf format and sent to all of them by e-mail in order to make exchange of experiences improved. Moreover, a tool box is also available on the restricted access of FLAME



internet website. Many administrative, technical documents, communication leaflets, ppt presentations produced by all the agencies as well as the meeting memos can be downloaded.



- > **Task 4 “Project web site”:** FLAME’s Internet website and the pages dedicated to FINANCE project are operative since the beginning of the project. Intranet pages with restricted access were also opened in order to exchange experiences and documents amongst members of FLAME.

France (RARE):

Task 1: “national conferences/meetings” and a final international conference meeting: the whole work programme presenting the tasks to be carried out was presented and discussed during the following national meetings:

- ✘ **15&16/09/2005:** Annual general meeting held in Paris
- ✘ **12/04/2006:** Meeting held in Paris to discuss the main expectations and needs from the local energy agencies regarding FLAME federation and relationships with RARE;
- ✘ **25/09/06:** annual general meeting between RARE and FLAME held in Toulouse to discuss the future co-operation.

- ✘ **01/12/06:** Annual general Assembly held in Lyon gathering all presidents and directors of regional energy agencies members of RARE

Task 2 “Business Plan” each association will develop a **Business Plan** adapted to their own situation, studying at least the following aspects: financing of the association (quota system, subsidies from governments ...), annual action plan, strategic plan (position of the association as regards national and EU policies), training courses, dissemination activities, common projects, services to the members: The RARE business plan has just been elaborated and is currently submitted to the approbation of the Secretary. Until 2006 the network was totally financed by the membership fees. In 2007 a convention signed with ADEME will increase the budget up to 60%.

In September 2005, new members have attended the Board a new President was chosen. Two new members joined the network : ARER Réunion and AREL Lorraine.

Several documents have been published :

- “Objectif Développement Durable: Comprendre et agir sur son territoire” : returns of experiences and recommandations to implement local agendas 21, advises, technical references, examples, contacts.....,
- “L'éolien en France : initiatives de concertation et de planification : analyse de 20 cas exemplaires”.

Task 3 “Dissemination within the energy agencies” dissemination of the services rendered to the agencies: The working group “Communication” has initiated a newsletter (in-house to the network) that gives different information : planning of the events of each agency, information on the actions led by the working groups, report of the meetings of the Directors, the network activities and its implication on national and european level.

Task 4 “Project web site”: RARE's Internet website and the pages dedicated to FINANCE project are operative.

Greece

Portugal

The Netherlands:



Outcomes

D4 01 Abstracts including regular updates (as requested from The Commission)

D4 02 Project presentations (as requested from The Commission).

D4 03 Presentational material (as requested from The Commission).

D4 04 7 National Conference Meetings

D4 05 7 Final National Conference Meetings

D4 06 7 Association Business Plans

D4 07 Information services to the members of the association

D4 08 Project web site (hosted by EnerAgen web site)

6. CONCLUSIONS

With the project completed, we can now draw conclusions. These will be divided into some general conclusions, followed by the specific conclusions of each of the partners in the FINANCE project

General conclusions.

On reading this report, we consider the project to have been a success, given that both the initial objective and the deliverables set out in the proposal have been amply achieved.

In terms of the coordination between the different consortium partners, there was full collaboration and the coordinator would like to take this opportunity to thank all participants.

The project has helped build the nucleus for creating a nexus between the various European associations of energy agencies, or at least some of them. This promises to mark the beginning of a future network encompassing all European agencies. Such a group of agencies will allow all European energy agencies to make their voice - and their needs - heard, regardless of their size or origin.

We should also note the administrative and contractual problems that arose at the beginning of the project. At all times, the coordinator received help from EIEA officials and experts in solving these problems and successfully achieving the established objectives.

Looking to the future, the energy agencies continue to call for more support from the commission to allow them to continue and survive. To this end they are sending a raft of requests and recommendations to the European Commission so that they can have the resources they need. These recommendations include;

1. Reinforcement of the identity of SAVE agencies
2. Support for the role of the energy agencies from a political point of view. The European Commission is asked to make an even greater effort in explaining the role of the energy agencies to political officials.
3. Continued support for the creation of new SAVE agencies and the creation of new contact points



4. Financial support to the SAVE agencies (beyond the three-year period), and new types of financing
5. Support from the EC and EIEA for agencies to have more “professional” administration or one that is geared towards economic benefit with a business philosophy. One of the forms such support could take is through the training of staff from the energy agencies, with the creation of efficient management teams on specific subjects.
6. Reinforcement of Managenergy and theme networks
7. Support for the creation of associations of energy agencies. This support to the agencies could take the form of events such as lectures, seminars, and training in general, inter alia.

Conclusions of the project in each of the countries in which the project has been undertaken.

Conclusions in Spain

The project has allowed the role played by EnerAgen vis-a-vis the Spanish energy agencies to be furthered. Spanish energy agencies now see EnerAgen more clearly as a channel by which energy agencies can communicate their needs to public authorities and decision-makers. The presence of EnerAgen as an association whose members range from representatives of national agencies to local agencies ensures active participation in state decision-making on energy matters.

The satisfaction survey demonstrates the energy agencies' need for training and advice in several areas. This shows what EnerAgen needs to do to best serve its members.

Returning to the FINANCE project, it should be noted that this project was the first occasion on which various Spanish energy agencies worked together jointly. Collaboration has been very close; proof of this can be seen in the fact that many of the energy agencies were involved in presenting the deliverables, and in some cases all of them were involved.

The deliverables in this project include elements which will be of great help for the agencies and for the association itself. These include: The agency satisfaction survey, which will make it possible to determine more precisely the needs of the agencies in the different associations; the association brochure,

which will allow the association to be marketed more appropriately and effectively; and the Best Financing Practices which will act as an example for the agencies in terms of both their internal financing and for financing energy projects.

The national symposia have also served as a forum for holding meetings among energy agents and agencies.

Spain:

Bulgaria

Finland.

France (FLAME): The FINANCE project was a great opportunity for FLAME and all the members for many reasons:

- > **The financial support from the European commission was a clear signal** encouraging all energy agencies (created or not in the framework of the SAVE II programme) to meet more regularly and exchange experiences in order to improve local activities; Even if the financial support from EU was well appreciated, we did realize that networking costs a lot of time and money but payback can be profitable;
- > **The Finance project helped to increase the exchange of experiences in the framework of the 4 working groups set up 3 years ago** (“energy and local authorities”, “transport and sustainable mobility”, “agriculture and energy” and “urban planning and energy”);
- > **The Finance project was the first European project experience for the recently-created federation:** since FLAME submitted a new bid in the framework of the SAVE call for proposals and managed to get the support from EU! (Eco n’Home project);
- > **The Finance project was clearly a time that helps all the local agencies to have to deep discussions and debates regarding the expectations and the needs formulated by each member.**



The meeting we had in April 2006 in Paris was quite fruitful as each agency expressed its own opinion concerning FLAME. This was a basis from which FLAME will elaborate its action programmes for the next years as well as its business plan;

> **Finance project helped RARE and FLAME to strengthen co-operation links for the next years:** some of the regional and local energy/environment agencies has historical relationships as some of the members of RARE helped the setting-up of new local energy agencies. That was really the case with Rhônalénergie Environnement that supported the creation of 3 local energy agencies (ALE de l'agglomération grenobloise, ALE de l'agglomération lyonnaise, ALE du département de la Loire). Some of the regional agencies really understood that there was a clear necessity to get local relays in order to have a genuine and well-implemented regional energy policy. Moreover, both networks decided to:

- ✘ Meet twice a year (during each networks' annual meeting);
- ✘ Set up common working groups with pre-defined topics: energy and sustainable development, how to create a local energy management agency, etc.
- ✘ Have common lobbying action towards public institutions and organisms on the occasion of the vote of new laws and European directives for instance;
- ✘ Etc.

France (RARE):

This project was an opportunity to take part in an European project. It was the first time RARE participated in one so it explains the difficulties encountered, the misunderstandings....

At the launching it was very difficult to establish a commun secretariat : FLAME and RARE but it has contributed to re-inforce the cooperation between the two networks. The two networks decided to meet regularly (during each networks' annual meeting); to implement

common working groups with pre-defined topics: energy and sustainable development, how to create a local energy management agency, etc.

For RARE the project has been positive as it gave the opportunity :

- to identify the expectations and the needs of the members,
- to better cooperate inside the RARE network and with external agencies ,
- to create new working groups.

This project has boosted the RARE network and one person was employed to manage the actions of the network and facilitate the exchange between its members.

Greece

Portugal.

The Netherlands

The sole responsibility for the content of this [webpage, publication etc.] lies with the authors. It does not represent the opinion of the Community. The European Commission is not responsible for any use that may be made of the information contained therein