

D3.3 Public Support Days Report



Work Package: WP3

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Executive summary

The SUNSHINE multi-stakeholder platform (MSP) allows for replicability across different partner contexts based on a single set of guidelines and procedures. By incorporating an ecosystem approach to the entire building renovation process, we ensure standardisation, transparency and efficiency.

For this standardisation to work at scale, all potential stakeholders have to want to work/collaborate on these same sets of procedures. The platform was designed by mapping the stakeholder's journeys, facilitating the use of the platform to encourage ownership and consistent usage.

One of the key aspects required to secure platform sustainability is training and support to users and stakeholders within the FINEERGo-DOM project ecosystem and beyond.

Therefore, while platform development is a key component of the first year, continued user testing and bug fixes thanks to stakeholder use and feedback is critical to the success of this milestone. We therefore encourage as much participation as possible through training and support days. To ensure stakeholder engagement, we designed collaborative sessions of support or training to be scheduled during the final months of platform development - the Public Support Days.

These days or sessions were provided to stakeholders directly involved in the financing scheme or in the selected building renovation projects (concerned building owners, Service Providers, Maintenance Companies, s, etc.). This task builds again on the stakeholder engagement from WP2 and leads into WP6, as content has been created for continued dissemination to the general public about a project for appropriate channels (i.e. social media, forums, internet, email list serves). It will be necessary to provide for further Public Days in the coming years as we progress across the full spectrum of stakeholders from Beneficiaries to Stakeholders.

1. Public Support days

Additional training and support days were to be carried out to provide stakeholders directly involved in the financing scheme as well other organizations in the selected building renovation projects, part of the FINEERGo-DOM. Online virtual events for Public Support Days to take place in each partner country and be led by Stage AI were planned and executed. Each of the partners and their stakeholders were to be introduced and helped to understand and capture the essence of the SUNSHINE platform. These online public support days were conceived to coincide with the final months of development of the SUNSHINE platform to offer a richer experience for stakeholders as well as a more profound user testing and bug testing process for Stage AI and Ekubirojs.

During the last 2 months of development before the launching of the Platform in July, only the internal training sessions with partners from the FINEERGo-DOM project were conducted, since several technical issues were found and was decided to start the Public Support Days at the end of June and throughout July. Several of the meetings occurred during that period. We did not manage to organize the days in all countries and therefore decided to conduct the rest during the autumn months. The meetings were with a diverse set of the stakeholder types like financial institutions and real-estate companies, as well as Agencies focused on Energy Efficiency projects. However, further reach is needed in order to include building owners and more service companies that are a critical part of the projects' development. We conducted numerous country specific trainings, leveraging the

community of stakeholders built by our consortium partners and managed to collect valuable feedback for future improvement.

2. FINEERGo-DOM partners training

After the completion and official deployment of the platform, training sessions were organized for the partners of the FINEERGo-DOM consortium. These training were organized and planned in a way to provide partners with the necessary knowledge and skills. Those training sessions were critical for the further presentations of the platform to each of the partner's national stakeholders.

There were two sessions, as the first was introductory and involved the presentation of the main processes in the platform as well as a demonstration of the platform's main functionalities.

For the first sessions, there were shown several of the main user scenarios and the various steps a user has to take to achieve a goal in the platform.

Showcased were the registration of :

- Assets
- Organizations
- LEAR applications
- Projects
- Forfeiting Applications

The second session was practical and hands-on oriented for the partners of the consortium. All the participants were beforehand organized in two groups and specific scenarios were prepared for each group.

Those involved four phases and four checkpoints that all participants had to complete.

Those four checkpoints were :

- All LEARs are validated, all users belong to a valid Organization with some role
- All Organizations have a registered and validated Asset
- All organizations have a project with assigned Project Legal Signatory, Project Manager and Task Managers
- All projects have a Forfeiting Application approved, have completed the Works phase successfully and have reached the Monitoring Phase of a project

After the completion of those checkpoints by all the participants, there was time for Q&A on the topics that were presented and tested out. During the session itself there were also questions being asked and answered towards either a specific functionality or a specific user flow. There were also useful suggestions given by some of the partners on matters of specific data points or specific relations and applied later on by the development team of Stage AI.

3. Public support days with Polish partners

The meeting was organized with the help of our partners on the FINEERGo-DOM project, namely - ESEB and KAPE. The meeting was with several of the Energy related Polish funds, namely the Polish Development Fund and the National Fund of Environmental Protection and Water Management, where the processes that are being developed as part of the FINEERGo-DOM Project as well as their actual implementation in the Platform was demonstrated by Stage AI.

As part of the meeting there was a presentation on the innovative methods for refinancing being introduced by the FINEERGo-DOM consortium and a demonstration of some of the platform's functionalities. The financial mechanisms and the main concepts around the platform were presented from Ekubirojs.

The demonstration of the platform functionalities included going through the phases of a single project and the reviewing of the requirements and actions available through the Milestones module developed and presented in detail by Stage AI.

The preparation for the demonstration included the adding of data for a real Asset, given to Stage AI by ESEB, as well as the creation of a Project for this particular Asset and the filling up the project details like investments, construction costs and energy baseline consumption. This particular Asset and Project were used to showcase the different possibilities for the different roles that users can occupy. After demonstrating the major functionalities the meeting continued with a focus on the Asset Acquisition Phase, part of the Milestone module. There colleagues

from Ekubirojs further explained the process presented in more detail and emphasizing on the progression between milestones as well as the necessary document, contracts and data that are required for the successful completion of each step. A discussion began as there were several questions from the guests of the meeting, especially about the Energy performance contract itself, as well as the steps before signing it. The meeting concluded with the showcasing of the Project Simulator, a smaller module in the platform used to demonstrate quickly and easily the possible benefits of the schema and the energy efficiency projects to a new user.

4. Public support days with Bulgarian partners

As part of the Public Support days, there was a meeting with the Bulgarian Energy Efficiency Fund, organized by Stage AI and with the help of representatives of Econoler, another partner organization of the FINEERGo-DOM consortium.

After a presentation on the innovative methods for refinancing , a demonstration of the main platform's functionalities and concepts proceeded .

The demonstration included going through the platform functionalities from the following modules:

- Project Simulator and Benchmark Visualizations
- Organizations and assets modules
- Projects creation and process
- Milestones phases of a Project

The Milestone phases of a single project and the reviewing of the requirements and actions available through the Milestones module was further explained and elaborated upon by partners from ECONOLER who explained in depth the process of the refinancing schema and the steps involving the Forfeiting agreement that are

part respectively of the Asset Acquisition phase, the Works phase and the Monitoring and Maintenance phase:

- Forfeiting application
- Forfeiting payout
- Forfeiting annual check

The guests from the Bulgarian Energy Efficiency Fund were interested in the platform's functionalities and asked several questions around the registration of Assets and the importance of the cadastre number, as well as the Forfeiting application and agreement which was explained in depth. There was also discussed the possible integration with a tool developed and maintained by the Bulgarian Energy Efficiency Fund which has similar functionalities to the Benchmark visualization module in the SUNSHINE platform. The data available in the platform (<https://app.enerfund.eu/>) could be considered for integration with the SUNSHINE platform at a later stage.

5. Public support days with Austrian partners

The meeting was organized with representatives from the Austrian Energy Agency, and the Austrian real-estate company BIG and representatives of the company.

The overall agenda of the meeting was the following:

- 1) Overview of project
- 2) ÖBEEF
- 3) SUNSHINE Platform
- 4) Advisory Board Meeting
- 5) Discussion Important discussion points and next steps agreed:
 - Design of long term energy saving contracts (possibility of adaptations by mutual agreement)
 - Standardised methodologies for temperature and utilization adjustments including monitoring
 - SUNSHINE as a chance to reduce administrative costs
 - Offer of SUNSHINE training

Some of the questions that were discussed on the SUNShINE platform are :

1. Who can use the platform (registration and users)
2. What can be uploaded on the platform
 - plans
 - energy consumptions
 - protocols of meetings
 - all kinds of documents and resource materials
3. The advantage of the platform in reducing the administrative costs of the whole project lifetime and all its' phases
4. Monitoring of the Renovation Project regarding the progress of the renovation works and following the performance in terms of energy consumption after the construction phase is finalized
5. The data security issues in connection with the platform
6. Hosting the platform (also beyond the life-time of the project)
7. Different features and modules of platform:
 - Project Simulator and Benchmark Visualizations
 - Organizations and assets modules
 - Projects creation and process
 - Milestones phases of a Project

The participants took interest in the platform's modules, and especially in the Monitoring phase of the Project and the possibility for continuously seeing the performance of the building in terms of energy consumption and other crucial metrics.

6. Public support days with Slovak partners

The meeting with the Energy Center Bratislava was organized by Stage AI and a representative of our partners from Mattig Management who also participated in the talks. The Center was represented by the Managing Director of the organization. The questions of who are the intended users for the platform and how are we to decrease the double work on projects and existing operational flows and systems within the organizations already implementing such projects were discussed initially. The possibilities for integrations with Enterprise Resource Planning(ERP) systems as well as energy management systems for the monitoring of the performance of the building at hand were also touched upon.

The platform presentation was focused on showcasing the main modules of the system but especially the Assets module and the taxonomy of existing asset types in the system, both residential and public. In particular, several points around the Public types of buildings were made by the Managing Director. In Slovakia, the majority of projects in the area of Energy efficiency are focused on Public buildings.

The points included the differences in procedure and process of starting a project for a Public building, especially the step of Public tender. While presenting the Project sections and especially the Milestones module, it was noted that one of the first steps in the Acquisition phase of the Project, when it comes to Public buildings, is a Public organized tender which does not apply to residential buildings. An important difference that will be taken into account in the future when expanding the platform's modules to be better fit for Public building projects.

The Energy Performance Contracts module was presented and discussed at length as the different annexes and sections of the current contract in the system were reviewed. The possibilities for using the contract in Slovakia were discussed as well as the possible needs for adaptations to the legal specificities of Public buildings projects.

Another important point was made during the discussion of the second phase of the Milestones module, namely the Works phase that was again connected to the differences with Public Projects. The technological differences between the renovation works on residential buildings and the works on hospitals, schools and other public buildings were discussed and analysed. The different elements of the construction phase as well as the different energy needs and energy consumption patterns for those types of buildings would require additional options within the Milestones module to be developed. Overall the discussion and presentation were very useful for both sides, since the Managing Director of Energy Centre Bratislava took interest in the tool and the possible future use of it for projects in Slovakia, and on the side of SUNSHINE platform we received great feedback and important points for future expansion of the system.

7. Public support days with Romanian partner

The meeting was organized with Stage AI and a representative of our FINEERGo-DOM partner - Mattig Management Partners RO. The meeting was with representatives of DGASPC (General Directorate of Social Assistance and Child Protection), Urbana SA, a real-estate company, and Infinity Real Estate Investment SRL. The participants of each of the organizations were DGASPC Sibiu' General Manager, DGASPC Sibiu' Deputy Financial Manager, Urbana SA's General Manager and Infinity REAL Estate Investment SRL's Managing Director.

The agenda of this meeting was to:

1. Present the FinEERGo-Dom project
2. Present the SUNSHINE platform and its modules and functionalities
3. Discuss next steps and closing remarks

During the presentation of the platform the different features and modules were presented including:

- Project Simulator and Benchmark Visualizations
- Organizations and assets modules
- Projects creation and process
- Milestones phases of a Project
- Monitoring and Forfeiting sections

Among the questions discussed during the meeting were also:

- the existing legal framework in Romania and the possibility for adaptations of the system
- the old building stock that could be renovated in order to reduce the energy consumption

- the possibility to build new buildings with a very low energy consumption;
- the possibility of identifying projects to replicate the good solutions from the FINEERGo-DOM project
- LABEEF questions

The participants also discussed how to disseminate the information on the project and the platform in an efficient way and the next steps to be done.

Wiegand Fleischer presented the other parts of the FinEERGo-Dom platform, focusing on the main data structures of the platform within the entities like Organizations, Projects etc.

In addition to the discussion on LABEEF , there were several points on the process of the refinancing schema and the steps involving the Forfaiting agreement that are part respectively of the Asset Acquisition phase, the Works phase and the Monitoring and Maintenance phase of the Milestones module of the SUNShINE platform:

- Forfaiting application
- Forfaiting payout
- Forfaiting annual check

The participants expressed their appreciation for the presented functionalities and generally for this professional project management tool. The multi-stakeholder nature of the platform was discussed taking into account the diverse group of organizations that were present. Overall the possibilities for future use of the software tool in Romania are vast and must be explored further on as the project grows to include residential and public buildings renovated under the FINEERGo-DOM mechanism in the region of Sibiu and the rest of the country.

8. Public support days with Latvian partner

The meetings conducted in Latvia were intended to expand the use of the platform among project partners in other Horizon 2020 projects.

The meetings included organizations from Portugal, Italy, Netherlands, Germany, and France.

The agenda of the meetings have included:

- A shared discussion of the definition of a ‘One-stop-shop’ (OSS) platform, and how and why the SUNShINE platform fits the definition.
- The components of a OSS platform: decision-making module, project execution support module and reporting.
- Walkthrough the different modules.
- Final discussion with the attendants on their understanding of an OSS, the benefits and possible challenges in adopting the platform in their country, and the potential of the SUNShINE platform to be endorsed and used for their activities and projects.

Most of the attendants agreed that the platform does include the components to effectively manage a project, connect all involved stakeholders, and ensure a high level of transparency between them.

The attendees (in total 16 people) were provided with a login for the demo environment. The Super User who presented the platform will follow up with each one of them individually to guarantee complete understanding of the platform and define next steps for collaboration and platform use.

9. Conclusions

The Public Support days meetings that were organized with the help of all the partners of the Consortium were overall a great addition to the feedback already received on the platform as well as a source of new insights and potential vectors of further development. It connected greatly to the goals of WP2 as well as the goals of WP6 and the overall project progress. Several critical points were made , especially in the area of Public buildings and the project milestones that are required there, in addition to revealing certain corner scenarios and data specifics in the particular countries, like in Bulgaria. The meetings were useful and a great way to present the platform’s progress and the project’s goals. The interest in the system from all the meetings is certain, and has only confirmed the necessity for such a software to serve the needs of all stakeholders involved and provide transparency along every step of the projects’ phases.

PROJECT PARTNERS



STAGE



Mattig Management Partners