



# Pilot Regions Operationalisation of the Dedicated Teams

Liège (BE) - Rhodope (BG) - Murcia (ES)

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## Preface

It is essential to have an operational team working on a daily basis on the project (see [section 9. Operational structure of the One Stop Shop](#) for more details on how to set up a one-stop-shop).

Gathering people with the required skills and expertise is important in order to master the complex and various domains to take into account when launching an energy retrofit project. For example, being accompanied by an Energy Performance Contracting (EPC) specialist or an EPC facilitator is important, since it is quite new and not widely practiced. Creating synergies between them is also an important aspect to develop.

One of the main issues, setting a whole new team for such project with short deadlines is the time needed to find the right people and have them ready to work. It can take up to 6 months to have the right candidate joining the team.

The recruitment process is then a crucial point and it has to follow the legislation applicable in every country.

# Team's description

## Liège Pilot Region - RenoWatt

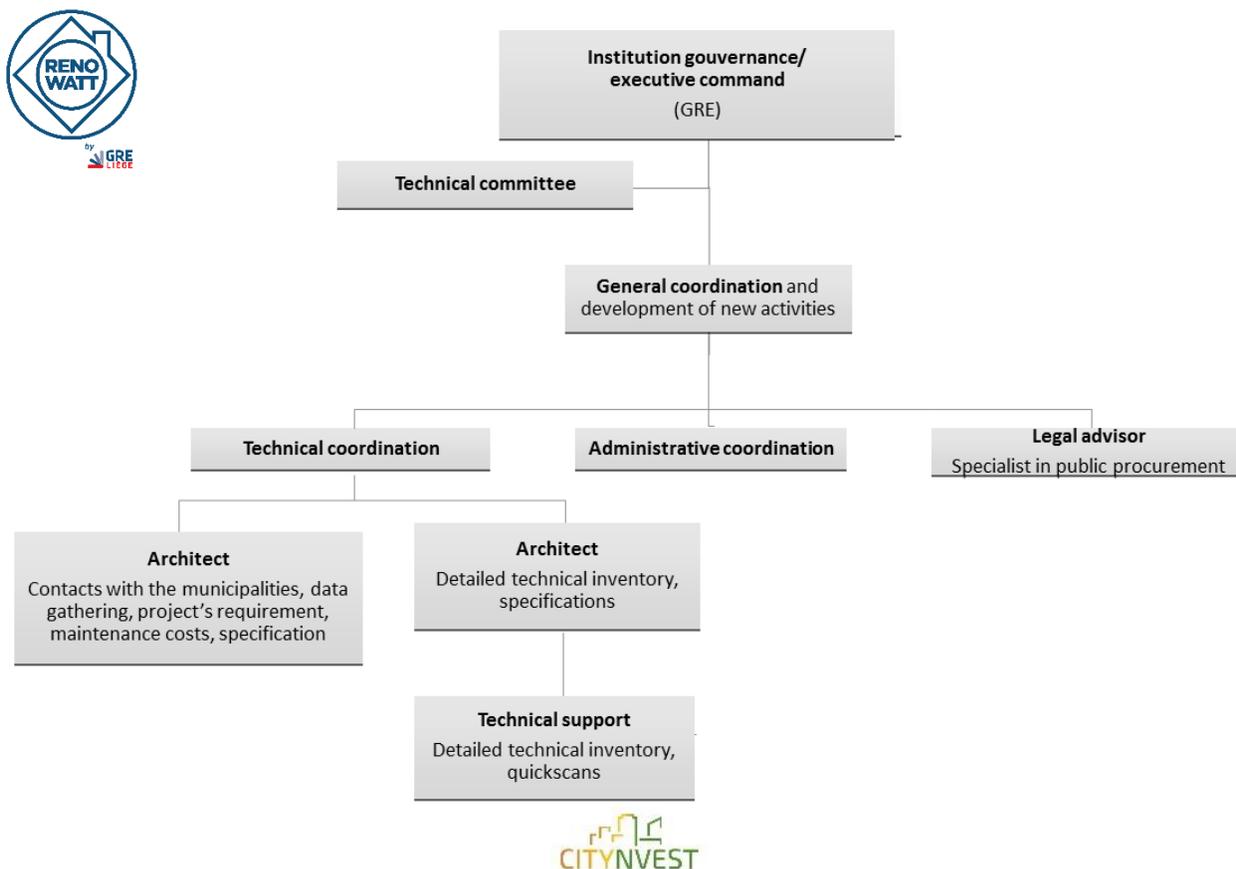
### 1. Operational structure of the One Stop Shop

The launch of such a structure requires to hire internal resources on the one hand and to call on external resources on the other hand.

The ideal scenario would be to hire all team members at the same time. In practice, it was different for the One Stop Shop: the staffing of the team took place gradually. The launch of the One Stop Shop started before the hiring of all team members. One should also take into account that the hiring process may take time (to find the right person, a selected candidate changes his mind, a selected candidate is not available immediately, etc.).

Here is an overview of the resources needed for the One Stop Shop "RenoWatt" and the role they play within the structure.

#### a) Operational team and consultants



## b) Internal team dedicated to the set-up of the investment program

- ❖ A project manager in charge of the global management of the project, and more specifically:
  - Coordination of the legal entities of the project (a highly time consuming task)
  - Coordination of the external auditors and follow up of the technical studies
  - Planning management
  - Management of the public procurement
  - In contact with the cities to identify correct data etc.
  
- ❖ An executive administrator
  - Management of the administrative/secretarial and accounting tasks of the project
  - Organization of the meetings (in and out)
  - Follow up with the person in charge of launching the structure of the first tenders
  - Communication
  - Organization of events
  
- ❖ Technical Coordination
  - Engineer who checks and coordinates the architects' tasks and ensures the implementation of technical aspects of project and develops the tools analysis with the architects.
  - Assessment and report to general coordination on the progress of the architects' work.
  - Identification and prioritisation future tasks
  - Focusing on technical issues involved in achieving the planned deliverables.
  - Modelling technical procedures
  
- ❖ Architects
  - Work very closely with the public authorities for the data collection, as well as with the different consultants that will be selected in the beginning of the project

- Are in charge of the detailed and technical inventories
- Carry out the technical audits

Depending on the amount of work to accomplish, the size of the technical team can vary.

❖ Technical support

- Detailed technical inventory
- Quickskans
- Occasional intervention within PAB buildings (e.g. placement of measuring devices,...)

Depending on the number of buildings, the size of architects' team, the detailed technical inventory and the quickscans may be executed by an internal team or external experts.

❖ A legal person:

- Draft of all the tenders, launch of the different tendering procedures
- Legal analysis of the all tenders
- Participation to the negotiations
- Allocation of the tenders
- Quality check of the contracts
- Interface role between the technical team and the lawyer, insuring coherence between technical and legal aspects in the project

Depending on the development of the activities, extra team members could be hired.

## c) External resources:

❖ An EPC facilitator

- i.e. someone with experience in the set-up of EPC's.
- The facilitator acts as an expert intermediary between the client and the ESCO market along the whole service project life, to enable EPC projects at the best conditions.
- The facilitator will propose different services such as:
  - Tools to gather all the energetic data and allow a baseline for follow up and evaluation of EPC contracts, tendering documents, contracts,...

- Support to select the buildings and bundle them in different pools
- Support for technical studies
- Financial structuring of the projects
- Support to select the best procurement procedure based on an estimation of the project value
- Analysis of the works to do in buildings
- Help to select the awarded company for the EPC contract
- Support to set up the service contract with the awarded companies

❖ Lawyer

- The lawyer has to be specialized in public procurement and building trades
- The early participation of a lawyer in the tendering process gives a legitimacy and may avoid concerns with indelicate contractors
- Defines all the future developments of the pilot project within a legal frame

## 2. Lessons learned from RenoWatt

- As previously mentioned, it would be more convenient to hire the all team in the same time but reality goes differently.
  - Might be difficult to find the right people at the right time with the requested competencies. Rely on a strong network is a real asset.
  - Offering a fixed term project for such high level profile (e.g. in case of coordinator) might be delicate (the staff is hired based on the TA subsidy (EEEE) which lasts 30 months)
  - On the other hand, having a recruitment process spread over time allows to exactly determine the profile required regarding the skills, competencies, strength and weakness of the team. It allows to set up a tailor-made team composition, able to give the best service, including all the aspects of the project.
- A committed multidisciplinary team is the key factor in such projects. The further the project goes, the more it is important to internalise the services offered. For all the technical aspects, the internal resources have to be able to provide a meticulous quality check of the documents and reports produced externally. The quality of the deliverable has an impact during the all project.

- Beside project management skills, financial, technical and legal knowledges, human factor plays a key role in negotiation and communication. Convincing the political level and keep them committed into the project is a challenge. Keeping the staff from the public authorities motivated to work with us needs to create a strong bond. This point is crucial as nobody knows their buildings than the public entity.
- Main required quality are: rigor, precision, knowledge of the buildings sector and last but not least creativity. This last quality is very important in such a new field as the launch of EPC's in a region. We are facing new challenges and we need to think out of the box.
- It is also important to have real polyvalent team members, able to work directly on the ground on technical aspects. E.g. occasional intervention within PAB buildings (e.g. placement of measuring devices,...) It helps to build the relationship with the public entity. They appreciate to have team members of the project directly available and not always working with sub-contractors.
- People with excellent knowledge in data processing, modelling IT solutions is much appreciated within de technical team.  
The same skills are also required for the person in charge of the financial projection: VAN calculation, ...
- We need to have a deep awareness of the deadlines and times constraints: Managing public sector/political agenda and tendering procedures. We have to take into consideration the political aspects. Public sector has its own restraints but it also constitutes a powerful lever to implement new model.
- In order to have a global approach of the technical side, a mixed team including architects and engineer would be an asset.
- At the beginning of the projects, it is crucial to have a good network within the public sector in order to quickly build a relation of trust and cooperation.

# Team's description

## Rhodope Pilot Region – Rhodoshop

### 1. General description

The One-stop-shop structure in Rhodope Region (Rhodoshop) is coordinated by SEC while the Association of Rhodope Municipalities (ARM) undertake the actual work on establishing and operation of structure to ensure sustainable energy investments realization.

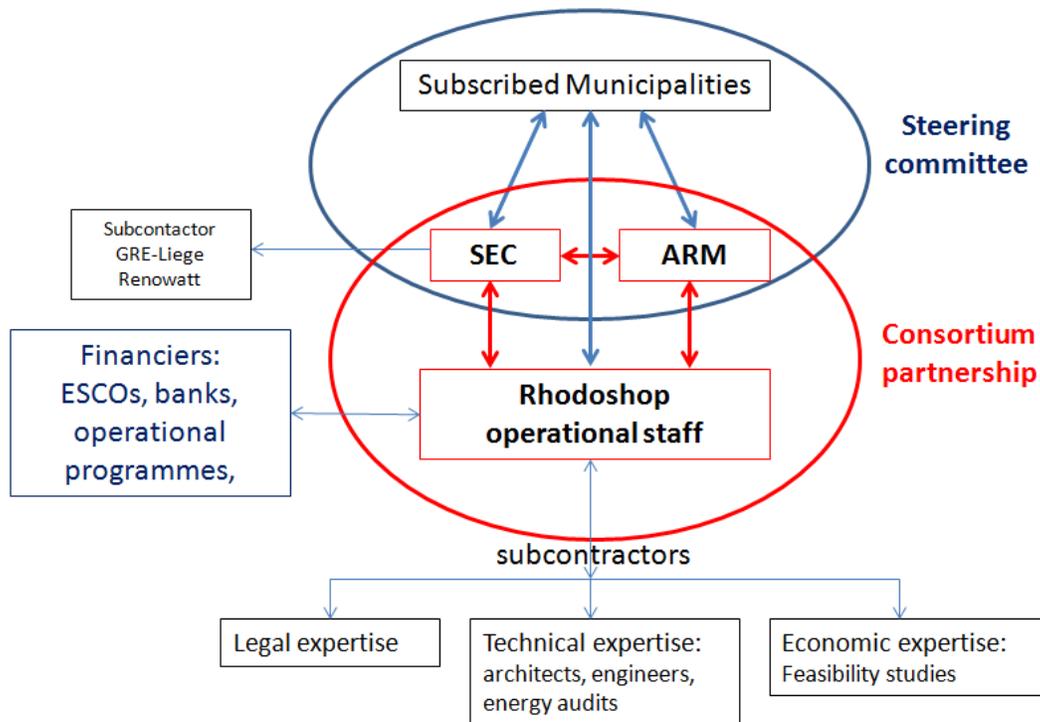
The main executive **decision-making body** of Rhodoshop structure is the **Steering Committee (SC)** consisting of representatives of SEC, ARM and of municipalities that subscribed to Rhodoshop initiative (at present stage 6 with the possibility for others to join within project duration). The Steering Committee will a) monitor progress of the project, b) decide any unresolved questions during the project and c) redefine, or further elaborate the planning and planned outcomes if necessary.

In addition a project **Advisory Board (AB)** will be set up consisting of representatives of 16 municipalities-members of ARM with the main aim to keep the local authorities informed about project development and results, ask their advice and contribution and promote project concept among them to take on board more subscribers to the initiative from Rhodope Region.

**The operational staff** of Rhodoshop structure working on a daily basis on the project will consist of **a Manager, one technical expert** with specific profile in energy efficiency in buildings and/or street lighting, **one economic/financial expert** in specific profile in economic assessment of energy efficiency projects and **two office assistants**.

## 2. Operational structure of the One Stop Shop

### a) Diagram



### b) Internal team dedicated to the set-up of the investment program

- ❖ Rhodoshop Manager in charge of the global management of the project, and more specifically:
  - Coordination of the legal entity of the project (a highly time consuming task)
  - Planning management
  - Coordination of the Rhodoshop staff in terms of project pipe-lines development – timing, quality of materials, task fulfilments, etc.;
  - Coordination of financiers contacts and negotiations;
  - Management of the public procurement;
  - Keep contact with the Steering Committee on project execution and reflect any changes and/or additional requirements.

- ❖ Rhodoshop technical expert: in charge of the specific technical works, more specifically
  - Coordination of the external auditors and follow up of the technical studies and recommendations;
  - Keep contact with municipal staff to identify correct data etc.
  - Provide technical criteria for the public tenders and their weight;
  - Provide monitoring on refurbishment works (where applicable).
- ❖ Rhodoshop economic/financial expert: in charge of the specific economic works, more specifically:
  - Coordination of the feasibility studies preparation, preparation of financial planning;
  - Provide possible financiers and follow up on their requirements and terms;
  - Provide specific economic data for feasibility studies (eg. energy prices, feed-in tariffs, etc.);
  - Provide economic criteria for the public tenders and their weight;
  - Provide monitoring on return on investment (where applicable).
- ❖ Rhodoshop technical assistant 1: assisting the technical aspects of project pipelines, eg. search for necessary data, collection of data, provision of contacts, coordination of meetings by phone, e-mail, etc.
- ❖ Rhodoshop technical assistant 2: assisting the economic aspects of pipe-lines: eg. search for necessary data, collection of data, provision of contacts, coordination of meetings by phone, e-mail, etc.

## c) External resources

- ❖ External resource 1: description/function  
Legal advice of Rhodoshop operation, legal advice on procurement tenders
- ❖ External resource 2: description/function  
Energy cadaster development for buildings and street lighting systems, energy audit schemes
- ❖ External resource 3: description/function  
Economic feasibility studies and project pipe-line bankability
- ❖ External resource 4: description/function  
GRE-Liege will provide Rhodoshop with one-site training on One-stop-shop functioning.

# Team's description

## Murcia Pilot Region

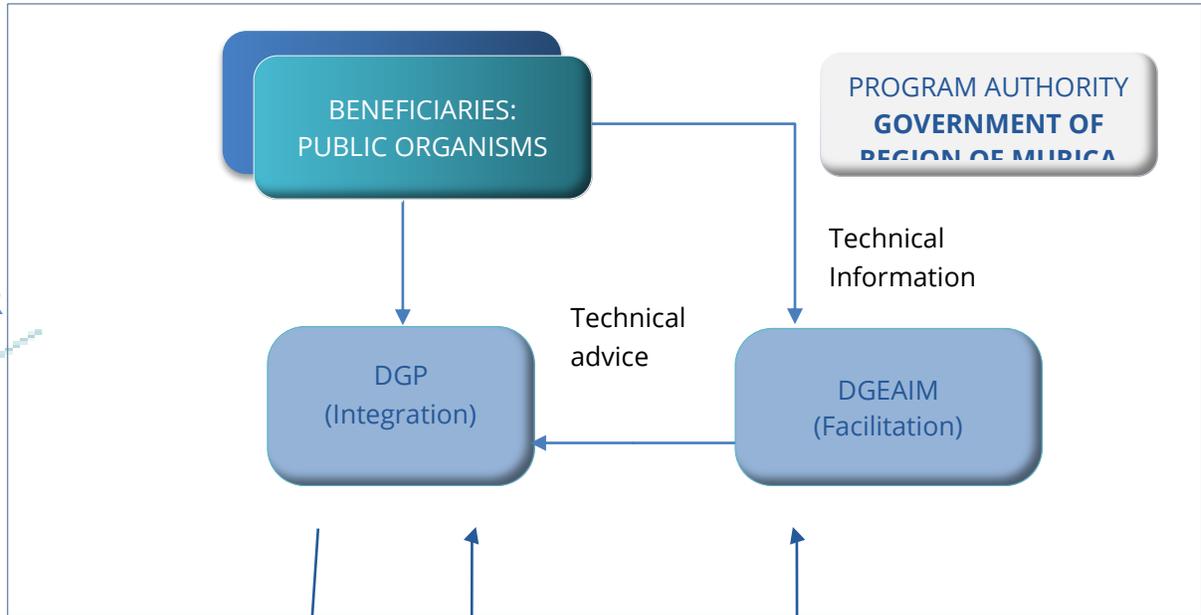
### General description

In the proposed model will be two management entities. First, the DGP (Dirección General de Patrimonio / Directorate General of Heritage) to centralize contracts and management of funds, thus realizing an integration function between beneficiaries and contractors and, secondly, the DGEAIM (Dirección General de Energía, Actividad Industrial y Minera/ Directorate General for Energy, Industrial and Mining Activity), which will be the PDU (Programme Delivery Unit), performing the functions of technical advice to the DGP.

Centralized procurement is a type of integration that includes budgetary and administrative tasks, but not technical functions such as energy audits, selection of buildings, energy inventory, needs assessment renewal and others that are reserved for the PDU. In addition, this model has the advantage that the PDU (Program Delivery Unit) has a more complete view of the technical problems to solve.

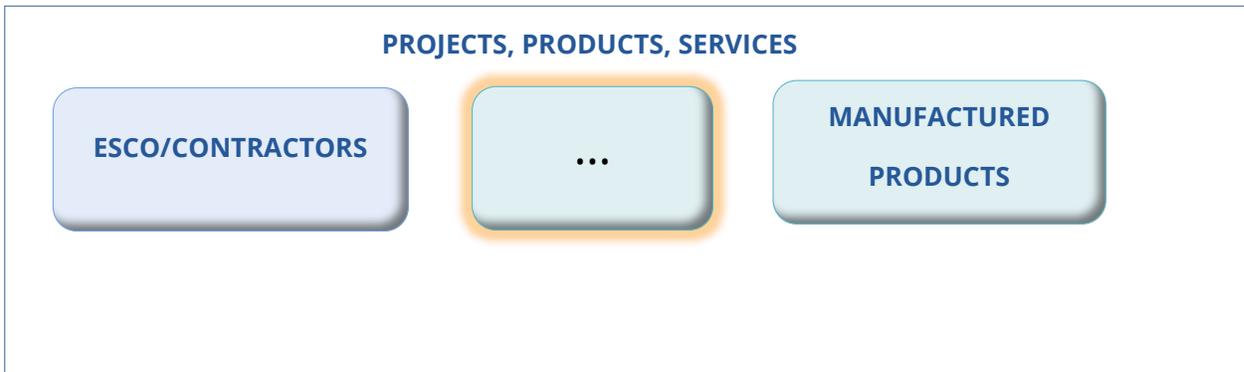
Therefore, the proposed model is a mixed model, in which coexist integration (budgetary and administrative by the DGP) and facilitation functions carried out by the PDU (in this context, DGEAIM), which will provide technical advice to the DGP for the best use of funds.

**PUBLIC  
SECTOR**



Contracts

Technical  
Information



# Resources used in plan energy efficiency in public buildings of the region of Murcia

Planning and implementation of the Plan for Energy Efficiency in Public Buildings Authority Program (Government of Murcia) use the following resources:

## A. Service Industrial Planning and Energy (included in DGEAIM)

- This service provides engineers and administrative staff.
- Two engineers and an officer will work on the development and implementation of the Plan. They made the necessary technical specifications for contracts managed directly by DGEAIM (energy audits and diagnostics)
- They also made the technical specifications for contracts to manage DGP.
- Also in DGEAIM there is a legal and economic service that supports and economic and legal advice. This service manages smaller contracts and payments to suppliers.
- For larger contracts there is an external service Recruited DGEAIM, but that is part of the Department of Economic Development, Tourism and Employment.

## B. DGP

- For the direct implementation of the Plan for Energy Efficiency in Public Buildings and relations with ESCO / Contractors, DGP has a coordinator, an architect and technical architect.
- It also has, similarly to DGEAIM of a Service Contract. This service officials manage contracts, publishing tenders, making awards and finally contracts.