



Programme Horizon2020
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Recommendations Matrix

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Recommendations Matrix User Manual

There are 3 areas of recommendation:

- Operational model: Facilitation or Integration
- Aggregation model, as add-on onto the operational model
- Financing model: Own Funds, FI Financing, ESCO Financing, PDU Financing, Investment fund, Citizens Financing

For each area, the user should answer the questions and check the box with the number "1". Multiple answers are possible.

For the Operational model, the model with the majority of checks is likely to be an adequate choice for you. In case the number of checks is equal for both models, you could get more expert advice from a knowledgeable consultant. More information to help you make a choice is also available in the model comparison report.

For the Aggregation model, if the number of checks is equal or superior to 3, it probably makes sense to envisage aggregation.

For the Financing model, the model with the majority of checks is likely to be an adequate choice for you as the primary model. However several models can be used in combination with each other. We do not recommend to use more than 3 models at the same time, unless there are good reasons to do so.

Recommendations matrix: operational models

Questions	Facilitation		Integration	
	Answers	Check	Answers	Check
What kind of implementation model is envisaged?	EPC/ESC	<input type="checkbox"/>	EPC/ESC	<input type="checkbox"/>
			Seperate Contractor Based	<input type="checkbox"/>
Does the implementation time (time to market) of the model need to be less than a year or can it be more than a year?	More than a year	<input type="checkbox"/>	More than a year.	<input type="checkbox"/>
	Less than a year	<input type="checkbox"/>		<input type="checkbox"/>
Is the creation of a Program Delivery unit as a seperate legal entity a hurdle that is hard to overcome?	Yes. The Program Delivery Unit can be managed by an existing organisation.	<input type="checkbox"/>	No. The Program Authority (PA) will have to consider the creation of a public local company to act as the Program Delivery Unit (PDU).	<input type="checkbox"/>
Who are the beneficiaries of the model?	Public sector	<input type="checkbox"/>	Public sector	<input type="checkbox"/>
	Residential sector	<input type="checkbox"/>	Residential sector	<input type="checkbox"/>
	Commercial sector	<input type="checkbox"/>		<input type="checkbox"/>
	Industrial sector	<input type="checkbox"/>		<input type="checkbox"/>
What is the level of ambition of the model?	Up to 35% reduction of energy consumption	<input type="checkbox"/>	Up to 35% reduction of energy consumption	<input type="checkbox"/>
		<input type="checkbox"/>	Up to 50% reduction of energy consumption	<input type="checkbox"/>
		<input type="checkbox"/>	Up to 75% reduction of energy consumption	<input type="checkbox"/>
		<input type="checkbox"/>	Carbon neutral	<input type="checkbox"/>
Does the model need to be highly scalable or not?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Does the Program Delivery Unit (PDU) need to be off the PA accounting structure on the long term?	Yes, the model can be sized according to the results.	<input type="checkbox"/>	No	<input type="checkbox"/>
Should the model discharge the local authority from risk?	Yes, as the technical risks of the projects are being taken on by the beneficiaries and/or the ESCO/Contractors.	<input type="checkbox"/>	No, as the technical risks are generally being taken on by the PDU.	<input type="checkbox"/>

Number of checks

0

0

Recommandations matrix: aggregation model

	Aggregation	
Questions	Answers	Check
Are project investment amounts too small to be handled separately?	Yes	
Are relative transaction costs too high for projects to be handled separately?	Yes	
Is the number of projects too high to be handled individually?	Yes	
Is there a risk that less bankable projects (e.g. perception of high risk) do not get financed?	Yes	
Is there an opportunity to bundle projects according to their typology?	Yes	
Is there a risk that the size of projects are below the threshold that third parties are willing to finance on a case-by-case basis?	Yes	

Number of checks

0
