



Fördjupad information om investeringskoncept

European City Facility - EUCF

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Vi som leder webbinariet



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Program

Inledning

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Om investeringskoncept

Stefan Olsson





ENERGIKONTOR
SYD

Eventet arrangeras av



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Inom projektet



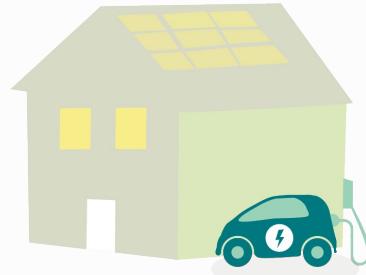
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Med stöd av



Vårt uppdrag är att verka för att

- behovet av energi ska minska
- energi ska användas på effektivast möjliga sätt
- att andelen förnybar energi ska öka



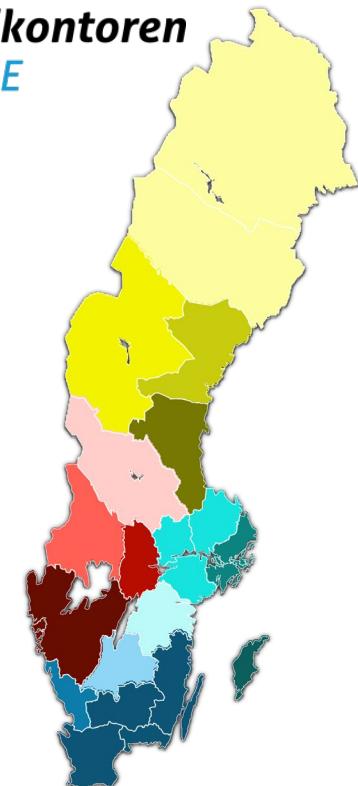
Vi är en del av något större



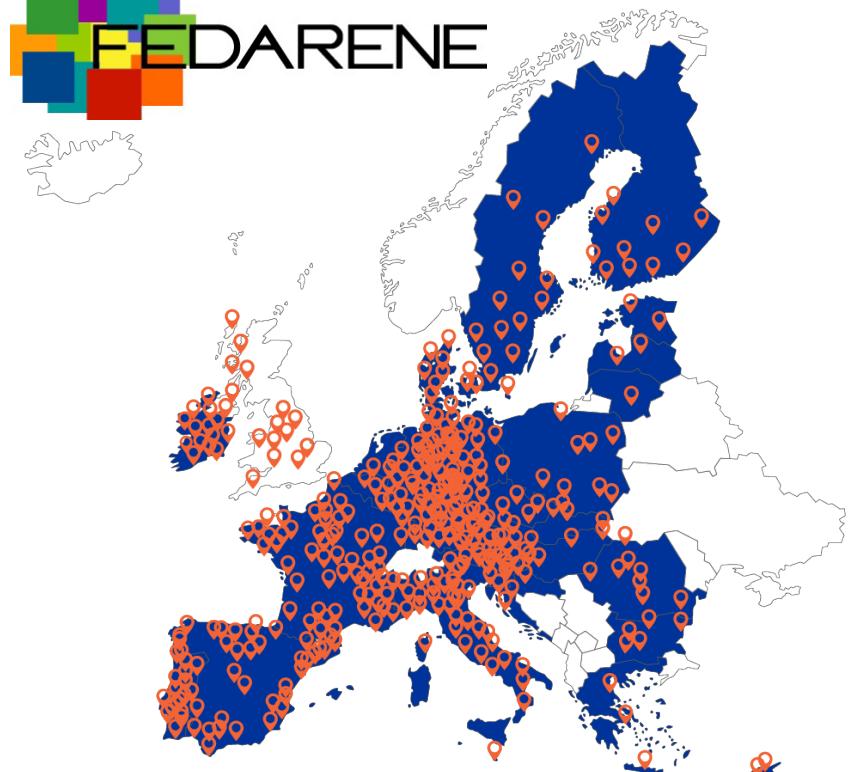
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Energikontoren
SVERIGE



FEDARENE



Call 5 open

28 April 2023 - 30 June 2023



<https://www.eucityfacility.eu>



Fördjupad information_call 5

24 maj 2023 _ Sverige



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Investment Concept

It translates a project idea into financial language

Purpose

- To provide investors and financial institutions with the information necessary **to assess a project for financing**
- To transform local climate and energy plans into sound investment packages and thus, **facilitate the access to funding for municipalities/local authorities.**



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■ Vad är ett investeringskoncept?

Investeringskonceptet blir ett första steg på vägen mot en full ”affärsplan” och finansiell plan som kan mobilisera kapital för att klara de investeringar som behöver göras för omställningen.

Kapitalet som ska mobiliseras i nästa steg kan komma från

- privata sektorn
- EU-program som exempelvis EFSI (europeska fonden för strategiska investeringar), ESIF (europeiska struktur- och investeringsfonderna)
- olika PDA (project development assistance) t.ex. Europeiska Investeringsbankens ELENA, eller olika nationella stödprogram.

EUCF:s roll är att stärka kommunernas strategiska arbete för att komma åt detta kapital.

Investment concept template



Summary of the planned investment

- “Teaser” with **key information** on the investment project;
- Equivalent to the **English Summary** for the validation of the IC.

Investment concept main body

- 1 Description of planned investment project
- 2 Promoter(s) and (local) stakeholders
- 3 Legal analysis
- 4 Economic and financial analysis
- 5 Investment Roadmap

Annexes

- Set of **supporting documents** to complement the main part of the investment concept.
- Letter of support to the **investment project** by the mayor or other relevant political representative

Investment concept template



Investment concept main body

- 1** Description of planned investment project
- 2** Promoter(s) and (local) stakeholders
- 3** Legal analysis
- 4** Economic and financial analysis
- 5** Investment Roadmap

Section of the investment concept template	Information to be provided by the beneficiary
1. Description of the planned investment project	<ul style="list-style-type: none"> • Objectives of the investment project • Project background, context and rationale • Description of the project • Market analysis and barriers • Summary of expected impacts
2. Promoter(s) and (local) stakeholders	<ul style="list-style-type: none"> • Replication and/or upscaling potential of the project • Summary of investment components • Overview of project promoter(s) • Ownership of assets and management structure • Risk profile of project promoter(s) • (Local) stakeholder analysis
3. Legal analysis	<ul style="list-style-type: none"> • Legal requirements applicable to the planned investment • Possible legal/regulatory incentives • Possible legal/regulatory obstacles • Preparatory studies and assessments conducted for the investment project
4. Economic and Financial analysis	<ul style="list-style-type: none"> • Estimated costs and revenues for the investment project • Economic viability • Risk and mitigation measures • Envisaged financing approach and funding sources
5. Investment Roadmap	<ul style="list-style-type: none"> • Technical assistance activities • Work plan



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Annexes

- Set of supporting documents to complement the main part of the investment concept.
- Letter of support to the investment project by the mayor or other relevant political representative

Annex A.1: SEAP, SECAP or plan of similar ambition ?

SEAP, SECAP or plan of similar ambition

Annex A.2: SEAP, SECAP or plan of similar ambition summary ?

SEAP, SECAP or plan of similar ambition – Summary [\[template\]](#)

Annex B: Letter of support to the project by the Mayor or other relevant political representative

Letter of support to the project by the Mayor or other relevant political representative [\[template\]](#)

Annex C: Self-declaration form by a legal representative of the municipality/local authority aggregating municipalities/local authorities ?

For municipalities/local authorities or groupings [\[template\]](#)

Annex D: Calculation log – Expected energy savings and/or renewable energy production

Calculation log – Expected energy savings and/or renewable energy production [\[template\]](#)

Annex E: Calculation log/support document – Expected size of investment ?

Calculation log – Expected size of investment [\[template\]](#)

Additional calculation log/supporting document ?



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Evaluation (utvärdering)

In the European City Facility



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Evaluation process

- ✓ Conducted by a **dedicated team of evaluators** from adelphi and EnviroS
- ✓ Each application is evaluated individually by two different evaluators. A third evaluator is assigned in case of discrepancy between the scores of the first two evaluators for one of the criteria
- ✓ Final score is determined by **the average of the scores of the two (or three) evaluators**
- ✓ Evaluation process takes place during **two months** after the call is closed
- ✓ Applicants are informed per e-mail of the results and receive **feedback on their performance**





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1. Ambition of the proposed investment project

- 1.1** Investment size
- 1.2** Investment per capita
- 1.3** Impacts
- 1.4** Impacts per capita
- 1.5** Cost-effectiveness
- 1.6** Focus on energy efficiency
- 1.7** Replication and/or up-scaling



2. Governance structure for development of the IC

- 2.1** Elements of the governance structure
- 2.2** Quality of the description
- 2.3** Quality of the governance structure for investment concept development



3. Stakeholder engagement strategy

- 2.1** Elements of the stakeholder engagement strategy
- 2.2** Quality of the description
- 2.3** Quality of the stakeholder engagement strategy for investment concept development



4. Coherence and plausibility Sammanhang och rimlighet

- 4.1** Coherence and plausibility of the proposed investment project
- 4.2** Coherence and plausibility of the provided figures

7 points

5 points

5 points

3 points

varav 2,5 gäller EE

20 total possible points



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Scoring of applications

- ✓ For each evaluation criterion, **evaluation questions with corresponding scores** are defined.
- ✓ The maximum score achievable by applicants in the evaluation is **20 points**
- ✓ A **quality threshold of 50% of the total points** applies to each evaluation criterion





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■ Var finns mer info? Några tips

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www.eucityfacility.eu

Mall/exempel på investeringskoncept kommer på EUCF:s webb

FAQ kommer också

Några tips:

1. Ha koll på www.eucityfacility.eu
2. Börja i god tid –
 - a) läs Guide for Applicants ,minst 3ggr!
 - b) förankra hos politiken på hemmaplan
 - c) lär om ansökningsverktyget EUCF platform
 - d) Delta den 24 maj kl 9-11 på fördjupad info
3. Följ anvisningarna till 100% – använd mallarna!
4. Fråga! 1. HelpDesk 2. CE
5. Tänk stort! (2-3 tEuro/inv kanske...)



Tack



Information och kontaktuppgifter på
energikontorsyd.se/eucf

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-  @energikontorSO
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