Call for tender – Support services for the development of Community Energy Financing Schemes for the ACCE project consortium.

LIFE21-CET ACCE – Access to Capital for Community Energy

This request for proposal is published in the framework of the LIFE-CET ACCE project. The bidders will have to execute the work under the rules and regulation of the LIFE CET program. Those rules can be found in annex.

The request is carried out by REScoop.eu, as the coordinator of the LIFE-CET ACCE project. REScoop.eu is the European federation of citizen energy cooperatives. We represent a growing network of nearly 2.000 energy cooperatives from across Europe and 1.25 million citizens. Through REScoop.eu, they want to make their voices heard in the EU energy debate. REScoop.eu engages in European energy policy and supports starting energy cooperatives in setting up and improving their daily business.

**Project Information**

ACCE - for Access to Capital for Community Energy - is a research project dedicated to the creation and development of CEFS (Community Energy Financing Schemes). This project will serve to develop innovative financing schemes for energy communities, from existing examples in the cooperative movement. The main objectives of the project are to:

- Create 5 Community Energy Financing Schemes (CEFS) in 5 target countries (RO, HR, ES, DE, BE) set up at the national or regional level.
- Realize 2 expansions (in scope and capital) for existing CEFS in the Netherlands and France.
- Create a European intermediary for national Community Energy Financing Schemes (CEFS) created to access EU capital and funds.

The ACCE project is looking to bridge the gap in financing that many community energy initiative are facing while developing their first projects or scaling up at the local level. Access to finance and support for scaling are major barriers to the development of community energy organisations across Europe.

**Community Energy Financing Schemes (CEFS)**

In the framework of the ACCE project, we consider a CEFS to be a financing scheme that funds community-based energy transition projects (sustainable energy, mobility, efficiency...) to overcome financial barriers which the community cannot tackle themselves. The primary purpose of those projects is to provide environmental, economic or social community benefits rather than financial profits.

For example, in France, the cooperative Energie Partagée manages a fund dedicated to investment in community energy projects. The fund collects citizen’s savings in the form of shares. Together
with public bodies and the private sector, the fund invests in project companies that own renewable energy installations (solar panels, wind turbines, biogas and hydropower).

**Objectives of the service**

The contractor will support REScoop.eu and the consortium as a whole in the delivery of project activities. The goal of the service is to provide consulting and support to partners looking to develop CEFS across 5 target countries – and help in the production of documentation for the inventory and development of CEFS.

This service contract is expected to start on the 01st of March 2023, and to last until the end of the project ACCE (30-10-2025).

**Description of the service**

The contractor will participate in specific tasks of 3 different work packages (WP):

WP2 is dedicated to the identification and classification of CEFS, collection of information for best practices (including understanding of failure and success factors), creation of a pan-European knowledge base and discussion of results with a group of Mentors.

We are looking for support in the collection of practices and models of CEFS throughout Europe, targeting specifically the UK and Ireland as we know of currently existing experiences in those countries. The contractor will feed into the discussion for the construction of a database of CEFS, provide information on the development of CEFS in the UK and Ireland (other countries is a plus). The contractor will also support the analysis of the collected CEFS to identify standard development models.

The deliverables for this task will be of two kinds:

- A written report describing CEFS mechanisms in the UK and Ireland (and potentially other countries if possible). This report will be integrated in to the “best practice report” of the ACCE project – and therefore the text must be made in compatibility.
- A contribution to project meetings to support to partners of the ACCE consortium.

WP4 is dedicated to replicate the ACCE approach in 5 countries and to expand the existing funds in the Netherlands and France with energy efficiency and/or district heating. As a result of this work, five existing cooperatives in Croatia (Zagreb region), Belgium (Flanders) Romania, Germany, Spain (Basque) will be able to manage or co-manage a CEFS with the appropriate capital.

We are looking for consulting services to support our partners in the development and implementation of CEFS in their countries (HR, BE, RO, DE, ES) and the expansion of existing CEFS (NL, FR). The contractor will support project partner with expertise, analyze and map local context and help in the creation of a sustainable model for the funds.

The deliverables for this task will be time spent with the partners and contribution to the ACCE Toolkit – a repository of documents and template for the development of CEFS.

WP5 is dedicated to creating a European cooperation between CEFS. The goal of this cooperation has four objectives:

- To ensure that the project results are sustained and improved after the project
- To collectively create access to EU funds
- To share knowledge between mentors and experts of CEFS
To effectively advocate supporting regulations and frameworks on a EU level
To create a common understanding on the ethics of CEFS

We are looking for consulting services to support our partners in the development and implementation of the European Intermediary – which will execute the collaboration of CEFS across the continent.

The deliverables for this task will be time spent with the partners and contribution to the EU Intermediary foundation documents.

**Deliverables**

Deliverables and supporting documentation should be provided to REScoop.eu at pre-established deadlines. Deliverables should be delivered in the format selected by the ACCE project. Cost reporting and justifications should be sent in the attachment of each deliverable.

The contractor is expected to provide all the necessary documentation to allow for the periodic reporting of the ACCE project.

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Description</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview of CEFS in the UK and Ireland</td>
<td>This report is meant to feed into the mapping of CEFS and to support the consortium to better understand the different formats of CEFS.</td>
<td>April 2023</td>
</tr>
<tr>
<td>Description of UK and Irish CEFS</td>
<td>This report should include an analysis of the UK and Irish CEFS identified by the contractor. This report should be included into the standardized models of the ACCE project.</td>
<td>October 2023</td>
</tr>
<tr>
<td>Contribution to replication of CEFS</td>
<td>This report summarizes the contribution to ACCE pilots that the subcontractor provided through the period.</td>
<td>April 2025</td>
</tr>
<tr>
<td>Contribution to the EU Intermediary development</td>
<td>This report summarizes the contribution to the structuring of the ACCE EU Intermediary.</td>
<td>October 2025</td>
</tr>
</tbody>
</table>

Other deliverables might be requested and negotiated on an ad hoc basis according to the needs of the ACCE project.

**Ownership of the results**

Results produced by the contractor will be the sole ownership of REScoop.eu.

**Payment Schedule**

We propose a payment schedule as follows:

- 30% of the total budget upfront payment upon signature of the contract.
- 20% of the total budget additional in June 2024, conditioned to the delivery of the work at a satisfying quality level.
- 50% of the total budget at full delivery of the service, and upon reception of the relevant administrative documentation.
Procurement process

Expected bid structure
Bidders should submit a written offer in English, including the following elements:

- A presentation of the methodology of the delivery.
- A detailed budget including an hourly rate and details of other cost positions.
- A short introduction of the staff allocated to the project completed with relevant CVs.
- A summary of previous experiences relevant to the ACCE project.

*Bids must be sent by email to Stanislas d’Herbemont (stan.herbemont@rescoop.eu) by the 17-02-2023. Please include in the topic of the email “CALL FOR TENDER – ACCE”*

Evaluation
As per Article 9.3 of the LIFE –CET Grant Agreement, the bidder will be evaluated on the principle of “Best Value for Money”. However, considering the typology of services and the core nature of the subcontracting to the ACCE project, the bidders will also be assessed along the best interest of the project.

The evaluation will be made on 100 points. The evaluation criteria will be split as follows:

**Quality of the offer (40 points)**

**Methodology of work (20 points)**
The bids will be assessed on the credibility and specificity of their methodology to support project partners to implement CEFS and work with community-led organization.

**Relevance of the offer (20 points)**
The bids will be assessed against the capacity of the bidder to execute the work in the targeted area (UK and Ireland) and additional points will be provided for bids covering a wider geographical scope.

**Previous experience (30 points)**

**Experience with the cooperative movement (10 points)**
The bidders will be assessed along previous experiences with the cooperative movement, and the capacity to build cooperative projects as this is the core of the ACCE concept – working with cooperative staff and leaders to support project development.

**Experience with financial management (10 points)**
The bidders will be assessed along previous experiences with financial management and services, and their capacity to shape and manage project financing mechanisms. This may include both public and private financing schemes.

**Experience with citizen financing (10 points)**
The bidders will be assessed along previous experiences with citizen financing and fundraising for community energy project. This is a core goal of the project to blend public, private and citizen financing.

**Price : 30 points**
The price of the bidders will be ranked from the lowest to the highest price with the lowest price taking on the maximum amount of points.

**Timeline of evaluation**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>20-01-2023</td>
<td>Opening of the call for tender</td>
</tr>
<tr>
<td>17-02-2023</td>
<td>Deadline for reception of the bids</td>
</tr>
<tr>
<td>20-02-2023</td>
<td>Selection of the winning bid</td>
</tr>
<tr>
<td>27-01-2023</td>
<td>Signature of the contract</td>
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<tr>
<td>01-03-2022</td>
<td>Start of the service period</td>
</tr>
</tbody>
</table>

The call for tender is opened on the 20th of January 2023. All offers should be valid until then expected end of the procurement process.

**Supporting documents**

You will find enclosed the work program of the LIFE ACCE project.

**Question and inquiries**

For any questions or inquiries relating to this RFP, please contact Stanislas d’Herbemont (REScoop.eu): stan.herbemont@rescoop.eu.
PROJECT SUMMARY

Project summary

Grant Preparation (General Information screen) — Provide an overall description of your project (including context and overall objectives, planned activities and main achievements, and expected results and impacts (on target groups, change procedures, capacities, innovation etc)). This summary should give readers a clear idea of what your project is about.

Use the project summary from your proposal.

ACCE stands for Access to Capital for Community Energy, it is a project to develop and scale up collective financing tools for energy cooperatives across Europe. This project will serve to develop innovative financing schemes for energy communities, from existing examples in the cooperative movement. The main objectives of the project are to:
- Create 5 Community Energy Financing Schemes (CEFS) in 5 target countries (RO, HR, ES, DE, BE) set up at the national or regional level.
- Realise 2 expansions (in scope and capital) for existing CEFS in the Netherlands and France.
- Create a European intermediary for national Community Energy Financing Schemes (CEFS) created to access EU capital and funds.
- To trigger the investment of 90 million euros of citizen investments through the creation of Community Energy Financing Schemes (CEFS).

LIST OF PARTICIPANTS

PARTICIPANTS

Grant Preparation (Beneficiaries screen) — Enter the info.

<table>
<thead>
<tr>
<th>Number</th>
<th>Role</th>
<th>Short name</th>
<th>Legal name</th>
<th>Country</th>
<th>PIC</th>
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<tr>
<td>1</td>
<td>COO</td>
<td>RES</td>
<td>RESCOOP EU ASBL</td>
<td>BE</td>
<td>939573429</td>
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<td>2</td>
<td>BEN</td>
<td>ENS</td>
<td>BEDRIJFSBUREAU ENERGIE SAMEN BV</td>
<td>NL</td>
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<td>3</td>
<td>BEN</td>
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<tr>
<td>4</td>
<td>BEN</td>
<td>GOI</td>
<td>GOIENER S.COOP</td>
<td>ES</td>
<td>950521722</td>
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<tr>
<td>5</td>
<td>BEN</td>
<td>BBE</td>
<td>BUNDNIS BURGERENERGIE EV</td>
<td>DE</td>
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<td>6</td>
<td>BEN</td>
<td>EPC</td>
<td>ENERGIE PARTAGEE COOPERATIVE</td>
<td>FR</td>
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<td>7</td>
<td>BEN</td>
<td>CDE</td>
<td>COOPERATIVADEENERGIE.RO SOCIETATE COOPERATIVA EUROPEANA CU RASPUNDERE LIMITATA</td>
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## LIST OF WORK PACKAGES

**Work packages**

*Grant Preparation (Work Packages screen) — Enter the info.*

<table>
<thead>
<tr>
<th>Work Package No</th>
<th>Work Package name</th>
<th>Lead Beneficiary</th>
<th>Effort (Person-Months)</th>
<th>Start Month</th>
<th>End Month</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>WP1</td>
<td>Management and coordination</td>
<td>1 - RES</td>
<td>13.00</td>
<td>1</td>
<td>36</td>
<td>D1.1 – Risk Management Plan&lt;br&gt;D1.2 – Ethics Report&lt;br&gt;D1.3 – Inception Report&lt;br&gt;D1.4 – Extract of the project data from the LIFE KPI webtool&lt;br&gt;D1.5 – Updated extract of the project data from the LIFE KPI webtool</td>
</tr>
<tr>
<td>WP2</td>
<td>Identification, validation and standardization of CEFS</td>
<td>4 - GOI</td>
<td>26.00</td>
<td>1</td>
<td>18</td>
<td>D2.1 – Database&lt;br&gt;D2.2 – Best Practice report&lt;br&gt;D2.3 – Training and webinar&lt;br&gt;D2.4 – Mentor network</td>
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<tr>
<td>WP3</td>
<td>ACCE Toolbox</td>
<td>6 - EPC</td>
<td>46.00</td>
<td>1</td>
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<td>D3.1 – Self-management guide for CEFS&lt;br&gt;D3.2 – Financial handbook and business case for CEFS&lt;br&gt;D3.3 – Repository with standardized documents at EU level&lt;br&gt;D3.4 – Toolbox</td>
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<td>WP4</td>
<td>Replication and expansion</td>
<td>2 - ENS</td>
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<td>D4.1 – Action plan for replication CEFS&lt;br&gt;D4.2 – Memorandum of understanding with stakeholders&lt;br&gt;D4.3 – Business and strategy plans for CEFS</td>
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<tr>
<td>WP5</td>
<td>Cooperation and exploitation</td>
<td>1 - RES</td>
<td>35.00</td>
<td>6</td>
<td>36</td>
<td>D5.1 – Negotiation statutes&lt;br&gt;D5.2 – Business and strategy plan EU organisation including EU potential for CEFS</td>
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</tbody>
</table>
## Work packages

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<table>
<thead>
<tr>
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<th>Start Month</th>
<th>End Month</th>
<th>Deliverables</th>
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</thead>
</table>
| WP6             | Policy research and adaption   | 1 - RES          | 30.00                  | 1           | 36        | D5.3 – Charter  
D5.4 – Fundraising policy  
D5.5 – Final agreement EU fund  |
| WP7             | Communication and dissemination | 5 - BBE          | 25.00                  | 1           | 36        | D6.1 – Regulatory framework analysis  
D6.2 – Enabling framework report  
D6.3 – Final report on policy and financial enabling framework report  
D6.4 – High level policy workshop on financing energy communities  
D7.1 – Communication plan  
D7.2 – Communication package  
D7.3 – Dedicated final event  
D7.4 – Easy to digest Toolbox  
D7.5 – Final publishable report |
Work package WP1 – Management and coordination

<table>
<thead>
<tr>
<th>Work Package Number</th>
<th>WP1</th>
<th>Lead Beneficiary</th>
<th>I. RES</th>
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</thead>
<tbody>
<tr>
<td>Work Package Name</td>
<td>Management and coordination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Month</td>
<td>1</td>
<td>End Month</td>
<td>36</td>
</tr>
</tbody>
</table>

**Objectives**

This work package will ensure that the project produces the expected results and impacts in time and within the proposed budget. REScoop.eu as the Project Coordinator (PC) will manage the overall project planning, coordination and reporting and support project partners in these tasks. The PC will ensure effective communication with the EU Project Officer and among partners; the PC will also support partners in providing the necessary reporting documents. Finally, the PC will ensure the necessary reporting and monitoring tasks are coordinated amongst consortium members in order to reach the ambition of the project. This work package further includes measures to guarantee the ethical and quality standard for the delivery of the project.

**Description**

Task 1.1 Administrative and financial management (Lead: RES; All, M1-M36)
This task includes the overall administrative and financial management of the project. The PC will closely follow and support the project progress and monitor the fulfilment of the contract with the EC. In particular, the PC will administer the contract with the EU, compile cost statements, coordinate and follow the project’s inception report, intermediate reports and the final report and ensure that all milestones are met and that all reports are prepared in accordance with contractual requirements.

RES, as coordinator, will contribute, upon invitation by the Agency, to common activities related to information (like reporting on impact indicators), dissemination and visibility, and synergies with other LIFE and EU supported actions.

Task 1.2 Consortium facilitation and internal communication (Lead: RES; M1-M36)
This task will be focused on the internal management and facilitation of the consortium. The PC will be responsible for the overall management of the project, and provide support for the facilitation between work package leaders and partners. This task includes: Monitoring the achievement of high-level objectives in coordination with the Replication Manager (RM). During the first three months of the project, RES will set up a project work-flow plan (i.e. Inception Plan - D1.3) in cooperation with consortium partners for a comprehensive project overview, and to clearly identify information requirements and deadlines. The WP leaders will be asked to provide a similar plan for each of their WPs, indicating the exact work to be completed per task, and the interconnections between WPs. Establishment of an internal communication system and a platform for the exchange of data, files, knowledge and experiences among the consortium partners. For this purpose, RES will purchase professional platform licenses specifically for the project and used to ensure proper internal communication and document storage in the consortium. The PC will be responsible for organizing the project’s response to all the requests from the EC, provide guidance to the consortium partners and maintain an open communication with the EU project officer.

Task 1.3 Quality and Risk Management (Lead: RES; M1-M36)
This task covers the overall quality management of the project, including risk assessments and mitigation actions. The PC will closely follow the project progress, co-ordinate the quality management of the project, provide continuous risk assessment and in case of problems, initiate the required corrective actions in cooperation with the concerned partners. RES will cooperate with WP leaders to ensure consistency and standardisation of project-related information, as well as the quality of each deliverable. WP leaders will oversee quality control of their deliverables. Carry out effective management and close monitoring of all activities within the project’s framework in close cooperation with the WP leaders. An overall risk assessment of the project will be compiled in M6 (Risk Management Plan - D1.2), and updated according to the development of the project.

Task 1.4: Monitoring and reporting (Lead: RES; M1-M36)
The PC will coordinate the collection and aggregation of project KPIs and the uploading onto the LIFE KPI platform. Periodic reporting (interim and final reports) on administrative and content related achievement will be ensured as part of the management activity. The coordinator will monitor with the EC the execution of all partners’ work, in particular the outputs and deliverables of all work packages, and will organize in the SG the feedback on the quality of the work. Results will be posted on the collaborative work facilitation platform, enabling all partners to give comments. Results will be adapted if necessary and the lessons learned will be taken into account for the next steps. The EC will permanently
evaluate the performance indicators and the coordinator will alert all partners on the evolution of indicators reached or not.

Task 1.5 Ethics requirements (Lead: RES; M1-M36)
This task ensures the Commission's ethical requirements are fulfilled and in particular that the ACCE project’s outreach activities collect and process personal data in line with the GDPR. Due to the nature of the project’s activities, a comprehensive ethics self-assessment has been carried out prior to the project to ensure that the proposal is compliant with relevant international, EU and national laws. The PC will also carry the role of Data Protection Officer (DPO) for the duration of the project. We will also tackle the wide range of ethical issues that might arise during the project like gender balance and under-represented communities (described in section 3).

Work package WP2 – Identification, validation and standardization of CEFS

<table>
<thead>
<tr>
<th>Work Package Number</th>
<th>WP2</th>
<th>Lead Beneficiary</th>
<th>4. GOI</th>
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</thead>
<tbody>
<tr>
<td>Work Package Name</td>
<td>Identification, validation and standardization of CEFS</td>
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<td></td>
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<tr>
<td>Start Month</td>
<td>1</td>
<td>End Month</td>
<td>18</td>
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</table>

Objectives

The main activities of this work package are the identification and classification of CEFS, collection of information for best practices (including understanding of failure and success factors), creation of a pan-European knowledge base and discussion of results with a group of Mentors.

Accordingly, the consortium will identify existing CEFS in Europe, establish contacts and actively involve at least 50 Renewable Energy Communities and Citizen Energy Communities. This will result in a core group of pro-active participants that will be further involved in various project phases. These Mentors, key persons of existing Energy Communities, will act as accelerators and facilitators of new CEFS and will draw the attention to the identified EU and regional best practices, key success factors but also identify the minimal external factors that need to be present to make a CEFS a success. The consortium will bring these Mentors together for training sessions in this WP, thus forging a virtual community of experts reachable for groups of citizens and national and regional civil servants thinking about setting up a CEFS in their country or region.

Description

Task 2.1 – Inventory of existing Community Energy Financing Schemes (CEFS) (Lead: GOI; M1-M6)
The aim of this task is to collect and classify the existing CEFS with the goal to provide a database of existing practices and lighthouse examples. This database will provide the benchmark for the development of standard models for CEFS.
The consortium has already identified several CEFS, specifically in NL, IE, FR and UK. The consortium will collect other examples through an open call to community energy organizations, municipalities and funding institutions, followed by qualitative interviews. The database will include basic information on the schemes (Which organisation finances the fund? Who manages the fund? What is the existing policy framework?). The inventory will be made available on the project website through a report analysing each CEFS (D2.1). The report will also be translated into a virtual map (T2.4) allowing for a visualisation of the presence of CEFS available per Member State. After the project, RES will keep this website up to date.

The consortium will support the collection of practices and models of CEFS through the subcontracting of consulting services from a cooperative network in the UK (Energy4All), currently managing the implementation of a CEFS in the UK, and IE.

Task 2.2 - Standardisation and cross-validation (Lead: GOI; M1-M12)
The aim of this task is to create standard CEFS schemes to be implemented in other Member States covered by the consortium and beyond. The task will also look to improve on existing schemes by providing cross-pollination: learn from each other and pick the best of each existing scheme. On the basis of the inventory, the consortium will evaluate and compare CEFS models and basic characteristics of the mapped CEFS to design the best-practice CEFS model. This task will deliver a best-practice report and training that will have enough specifics to help with the implementation in different countries but will account for the different national or regional contexts. Internal validation workshops will be performed to discuss the best-practice report and develop the training in the consortium to allow for partners to propose improvements to the report and training.
Next the consortium will, on the basis of the best-practice report, identify barriers for the creation of CEFS in countries covered by the consortium (NL, FR, BE, ES, RO, DE and HR). This will give a good insight on how the best practice can be implemented in different contexts. It will also give information on what can be standardised on EU level and what needs national or regional context.

During this process the consortium will explore solutions to those barriers and explore the possibility of standard models for CEFS across the EU. The output of this task will be a report and training (webinar(s)) on the best practice and barriers for CEFS, an in-depth analysis of existing models for CEFS in the consortium, with the respective piloted improvements and if possible a standardised CEFS model or, more likely, a set of standard CEFS models according to specific conditions, (it is unlikely that there is a one-size-fits-all model). This task will lead into T3.2 where an evaluation is made of what can be standardised in detail on EU level and what needs to be created on a regional or national level (T5.4)

Task 2.3 - Creation of an expert network (CEF) (Lead: ENS; M1-M12)
The task will aim to identify, select and train a group of Community Energy Financing Mentors (CEFM) that will facilitate the development of CEFS throughout Europe. Our aim is to create a network of mentors acting as a first support line for community energy organisations and as multipliers to support governments looking to replicate CEFS models. Mentors will be or become experts in the development of community energy organisations, looking to develop the financial skills to support the development of CEFS. They should be able to give good coverage across the EU. Member States The CEFM will be recruited and selected through the activities of T2.1 and T2.2 as well as through other network activities. The CEFM will be invited to participate in 5 national workshops organized in countries looking to set up a CEFS. The workshops will involve policy makers at various levels of government (local, regional or national), with the aim to inform and start the conversation around CEFS. The national workshops will be organized in partnership with consortium partners. The 5 workshops will take place in Germany (hosted by BBE), Belgium (hosted by ECO), Croatia (hosted by ZEZ), Romania (hosted by CDE) and Spain (hosted by GOI).

Task 2.4 - Development of online map (Lead: GOI; M1-M18)
In close collaboration with T 7.2, this task will visualize the current state of affairs concerning (CEFS). Where they are located and the information we get in T 2.1. This gives a clear location-based overview for:
• Energy communities, to see what kind of access they have to capital in their region.
• Policymakers on a national or regional level, to identify possible lack of or insufficient access to capital for community energy in their region.

This can encourage them to take up this issue and work with local stakeholders to improve the situation. Through the website they can contact the EU Intermediary (T5.1) that can help them set up a CEFS. This task focuses on the content of the website for this specific part. The actual building of the website will be done in the communication WP7.

Work package WP3 – ACCE Toolbox

<table>
<thead>
<tr>
<th>Work Package Number</th>
<th>WP3</th>
<th>Lead Beneficiary</th>
<th>6. EPC</th>
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</thead>
<tbody>
<tr>
<td>Work Package Name</td>
<td>ACCE Toolbox</td>
<td></td>
<td></td>
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<tr>
<td>Start Month</td>
<td>1</td>
<td>End Month</td>
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Objectives

The objectives of this work package is to create supportive tools and methods to create new CEFS. Based on the experience of the partners, and the inventory and lessons learned of WP2, we will aim to reach three objectives:
• To create a toolbox to support the creation of CEFS
• To collect barriers and propose solutions for the development of CEFS
• To create common understanding of how a CEFS should work resulting in two handbooks for setting up new CEFS focussing on the governance and financial organisation of the CEFS

Description

Task 3.1: Toolbox creation (Lead: EPC; M1-M24)
This task aims to create a ACCE toolbox (“the Toolbox”) containing all the tools necessary for energy communities or public authorities to set up their own CEFS. The Toolbox will be organised along three axes. The first part of the Toolbox will be dedicated to create a repository of concrete examples and experiences of CEFS as well as potential impacts. The second part will provide detailed information on the governance and management of CEFS (T3.2) and its
financial aspects (T3.3). Finally, the third part will be filled with documents, tools and other resources CEFS need to function. The Toolbox will include:

(i) Concrete examples and potential impacts
   • The Inventory of existing CEFS across Europe (T2.1)
   • The Contact list of CEFM (T2.3)
   • A Reference document describing the community RES projects development and the related financial support needed at each step (T3.1)

(ii) Governance, management, financial and regulation support
   • A Self-management guide for CEFS (T3.2)
   • A Financial handbook and business case for CEFS (T3.4)
   • A European State aid guide (T6.1)

(iii) Complementary resources (template documents, standardised tools and contracts for the structuring of CEFS) (T3.1)

The Toolbox will be available in an online format and hosted on the website of REScoop.eu with direct links to the website of other partners, as well as on relevant platforms, such as the Community One-Stop-Shop. The toolbox will be translated in the national language of partners (NL, HR, DE, RO, ES, FR).

Task 3.2: Self-management, a step-by-step action guide (Lead: EPC; M6-M18)
This task will involve partners in identifying the critical actions necessary to set up cooperation between energy communities that can professionally self-manage CEFS. The challenge is that community renewable energy builds on the local expertise, knowledge, planning experience, organisational development expertise, local public relations knowledge and financing skills and contacts. This specific knowledge is not present in traditional financial fund managers which often creates a mismatch between the funds and the actors for which the fund is made. In this context, appropriate support can make or break a CEFS. Only giving capital is often not enough for starting energy communities. They need help to get through the local planning process, involve citizens and other key local actors, raise equity financing, and ensure that the structure of the enterprise fits local needs and experience. If this expertise is not close at hand and connected to the capital it is a risk for the fund and often a reason why the capital in funds is never fully used.
In addition, creating involvement of the end users of the fund is also important. How to create a fund for community energy by energy communities? This issue involves the creation of a pipeline and investment policy synchronisation with the end-users.

The consortium, thanks to the cooperation between energy communities, will develop a practical step-by-step guide (D4.1 - Self-management guide for CEFS) to engage and support energy communities in the development and operating phases of a CEFS. This guide will take into account the successes but also the failures of previous experiences, providing do’s and don’ts and illustrating them for each critical step identified.

Task 3.3: Financial barriers for CEFS and existing solutions (Lead: EPC; M6-M24)
This task aims at addressing the financial market barriers that threaten CEFS in different EU countries and at revealing the different solutions that already exist and could work to set up finance schemes in areas where they have not yet taken off. For example, the lack of return on investment in some RES projects may be an issue that can be addressed on a national level. The consortium will undertake a range of interviews with different stakeholders to provide a summary document (“Financing guide for CEFS”) with key financial barriers of CEFS and the resulting financing bottlenecks.
More specifically, the guide will be supported by:
   6 interviews of financial operators: (ethical) banks, leasing companies, agencies.
   6 interviews with regulatory agencies (AMF, APM, etc.).
   6 interviews of community RES-project developers.
6 selected interviews with the EIB, Coops Europe, European associations of RES and other relevant actors.
10 interviews of finance managers coming from private or semi-public organizations, cooperatives,
10 interviews of finance managers dealing with the energy sector
This barriers review and the results of those interviews will feed into the Financial Handbook (D3.2). Our goal is to produce an overview of the barriers which will serve the work in WP6, then find solutions in our network with the support of the Community Energy Financing Mentor network (CEFM) and the Community of Practice (COP).

Task 3.4: Development of a financial handbook and business case for CEFS (Lead: EPC; M1-M18)
This task aims at developing a Handbook on investment schemes. The handbook targets financial institutions and energy communities in order to facilitate the set-up of CEFS. It will be made in cooperation with stakeholders and partners in the replication and expansion sites in order to incorporate regional or national characteristics. Different investment models will be assessed according to the following items:
   • Types of financing description: Debt, shares, equity, etc.
   • Scheme potential: An estimate of the total amount of investment that could be generated by that model in those countries.
• Standard rough business plan: A description of cost and revenues of a CEFS.
• Feasibility in different countries: In what way is the fund reviving (how are risk bonuses calculated).
The handbook will be a practical guide on how to realize a working CEFS, listing how costs and incomes are calculated and how to organise a pipeline of projects. Moreover, this will include practical advice on communicating the financial details of the funds with public institutions, banks, private companies and citizens.

The CEFS initiatives will apply the Handbook in the 5 different replication projects. During the set-up, feedback on the use of the handbook will be collected through evaluation sessions within the Community of Practice (T5.4) and the Community Energy Financing Network (T2.3). The handbook will be updated at the end of the testing phase based on the feedback collected. After the project the handbook will be used by the European intermediate organisation (T5.1) for setting up CEFS all over Europe.

### Work package WP4 – Replication and expansion

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### Objectives

The objective of this work package is to use all the knowledge developed in WP2 and WP3 to replicate the ACCE approach in 5 other countries and to expand the existing funds in the Netherlands and France with energy efficiency and/ or district heating. As a result of this work, five standing organisations in Croatia (Zagreb region), Belgium (Flanders) Romania, Germany, Spain (Basque) will be able to manage or co-manage a CEFS with the appropriate capital, moreover two existing funds (France and Netherlands) will be significantly expanded to include new energy sectors with the committed appropriate capital. The end goal is to have these different CEFS ready for use by the end of the project.

### Description

**Task 4.1 - Action plan for CEFS replication and expansion to EF, DH (Lead: ENS; M1-M24)**

The consortium will identify the needs in the different countries (HR, BE, RO, DE, ES, FR and NL) based on bilateral interviews with community energy leaders and policymakers. The best practice report and the lessons learned (T2.1) from other countries will be used to determine the focus of the replication of CEFS and how existing CEFS will expand their fund to involve different technologies and/or different phases of the development of citizens’ RES projects. The involved partners will use the action plan for self-management (T3.2) the standard model (T2.2) to analyse the scheme potential from the financial handbook (T3.3) and translate it to the local context.

The Action plan for CEFS replication and expansion will clarify for each site: what steps in the development process of RES projects will be addressed, what technologies will be supported, which stakeholders will be involved in which role and what is the potential for the CEFS in the future. The action plan will describe the dedicated actions.

**Task 4.2 - Stakeholder engagement and creation of the pipeline (Lead: ENS; M6-M36)**

This task aims at creating support from key stakeholders and at gathering enough projects to create a pipeline on which the CEFS can be based. By using the “key user” approach, the stakeholders together with the pipeline of projects will be involved in creating the CEFS organisational and contractual details. Based on the structure of the CEFS described in the Action plan (T4.1), this task will fill in the details by co-creation with the stakeholders and the projects in the pipeline.

Constitution of the national/regional community of practice and creation of a pipeline

In each replication project, the consortium aims to involve key stakeholders in the local community. For this purpose, the national partner will undertake a project assessment through at least 10 interviews with key actors and community energy leaders. Based on these interviews with project holders, the partners will form a small pipeline of projects and gather the representatives in a national or regional community of practice (COP). This community of practice will be involved in the co-creation of the CEFS, using the standards from the Toolbox (WP3) they will be contributing to filling in further details. Giving it further local context in the governance, its procedures or financial agreements of the CEFS. The goal of the COP is to support the set-up of the funds to be the first projects to be financed by the CEFS.

Broadening support at the governmental and financial level

To get the required broad support from key stakeholders, the project team aims to build appropriate relationships with the government and financial institutions and create the necessary awareness and about the need for community energy to access capital and establish the needed cooperation between stakeholders. In order to formalise the cooperation
between stakeholders and the CEFS, a Memorandum of Understanding (MoU) will be created as an outcome of several workshops. The activities foreseen are (for each of the 5 replication CEFS, 2 expansion projects and at the EU level):
- An initial workshop with a broad group of stakeholders to illustrate the ideas, pros and cons, technical, economic and financial aspects – Mentors will take part as speakers at these workshops to foster community engagement;
- A workshop on-site with a selected group of stakeholders (from the initial workshop) to one of the RLS project from the COP, If possible mentors from the CEFM will be invited;
- The preparation of a draft Memorandum of Understanding (MoU) with either the government or financial institutions;
- MoU finalisation during a third workshop.
Formalisation of stakeholders participation. Once the MoU signature is achieved, project partners with their respective community of practice will proceed to the finalisation of the CEFS constitution through the following steps:
- Final agreement for the start-up of a CEFS between CEFS and community energy projects and the stakeholder that supplies the capital;
- Agreement on the pipeline of projects;
- Communication of the results to the broader network of energy communities in the region or on a national level.

Task 4.3 – Replication and expansion of CEFS (Lead: ENS; M6-M36)
In this task, all the knowledge created in WP2 and WP3 will come together in order to set up new CEFS. Based on the interviews of task 3.3, and the practical experience from members of the consortium, we will replicate the CEFS model in 5 countries (BE, DE, HR, ES, RO) and expand existing funds to energy efficiency and district heating in 2 countries (NL, FR). This replication activity will respond to four different objectives:
- To create access to capital for energy communities at different steps of development of their projects providing financial means at affordable rates;
- To finance energy savings projects and local renewable energy projects (including storage) allowing access to the energy market for small entrants from the social economy;
- To strengthen the cooperation of energy communities in a region or country by organising self-management and self-organisation of funds;
- To involve European citizens willing to invest in citizen RES projects, offering low-risk opportunities that generate tangible outcomes in terms of energy savings and RES energy generation.
Each National partner will use the Toolbox created in WP3 and adjust them so they fit the national or regional context in order to create the organisation needed to manage a CEFS. In this task the national or regional specifics will be dealt with by the national partners. These include:
- Create the organisation (define its nature, statutes and resources, including for regional expert centres);
- Involve the necessary persons with appropriate financial skills;
- Establish connections with the key stakeholders to support the first operations of the a CEFS (based on information of WP3)
This task will result in a business and strategy plan with all the details related to the organisation for the CEFS. Every CEFS will produce the necessary documents, internal processes and adjust the tools created in T3.2 to their local context. Some of these documents will be in the toolbox (T3.1) but will include some specific local context. Finally, some others may be created only for a local context when standardisation on a EU level is not possible. The basic documents are described in Section 1.4.

The consortium will support the replication of CEFS through the subcontracting of consulting services from a cooperative network in the UK (Energy4All), currently managing the implementation of a CEFS in the UK, and IE. This support will be provided in WP4 and WP5. This subcontracting will allow us to source targeting support for the replication and of the CEFS. The consortium will also purchase a specific platform specifically for the project used to store securely sensitive documentation and financial documentation.

The expansion CEFS in the Netherlands and France will not need as much expertise and support since they have the expertise in-house and will be giving support as mentors to the replication CEFS. They will get support from mentors and experts in the field of energy efficiency and district heating. For this they will also use the mentor networks created in REScoop Plus, SCALe 203050 and ECCO and the network of energy communities in REScoop.eu. During the process of support, the mentors will share their experience in the European Community of Practice (T5.4) and will work on the refinement of the Toolbox.

### Work package WP5 – Cooperation and exploitation

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**Objectives**

The objective of this work package is to create European cooperation between CEFS. The goal of this cooperation has four objectives:
- To ensure that the project results are sustained and improved after the project
- To collectively create access to EU funds
- To share knowledge between mentors and experts of CEFS
- To effectively advocate supporting regulations and frameworks on a EU level
- To create a common understanding on the ethics of CEFS

Past projects, like REScoop 20-20-20, have proven that European collaboration was a key success factor for energy cooperatives initiatives. Based on a similar approach, project partners will establish a common understanding through a European Charter (T5.2) (this charter will support advocacy efforts in WP 6) and will efficiently organise access to EU funds (T5.3). To support these tasks, ACCE will create a European intermediary to support the fundraising to large institutional and private funders with the goal of matching this capital with projects at the national and regional level, through national CEFS (T5.1) and gather a Community of Practice at EU level (T5.4). The objective of this work package is the sustainability and replication of the ACCE project beyond the project.

**Description**

Task 5.1: Set up cooperation between CEFS in the EU intermediary organisation. (Lead: RES; M9-M36)

This task aims to set up an EU intermediary organisation (using an existing body or by creating a new entity) to act as an access facilitator to EU finances. This organisation will function as the intermediate between national and regional CEFS and EU funds and capital. The partners will define its statutes including its mandate, its organisation and its limits. The key role of this entity will be to negotiate in front of EU funds on the behalf and interest of the involved CEFS, a particular attention will be given to this aspect. In this context, the task of the representative body will be to seek out potential funds to do business with. The first selection of funds will be discussed and selected by the participating partners.

Finally, the partners will define a business and strategy plan for this EU intermediate organisation. This plan needs to ensure that the project's results will be sustained and improved after the project and makes clear what services the organisation gives to national and regional funds to create a sustainable business.

This plan will include an early calculation of capital needed to fund initiatives at EU level. On the basis of the calculations made in T4.1 to assess the potential of the 7 schemes, the partners will extrapolate the potential of needed capital to the whole 27 other member states, creating the potential for a European wide coverage of CEFS. This future potential will be presented to policy makers and EU funds in T5.3 and T6.3.

The consortium will support the cooperation between national CEFS through the subcontracting of consulting services from a cooperative network in the UK (Energy4All), currently managing the implementation of a CEFS in the UK, and IE. This support will be provide in WP4 and WP5. This subcontracting will allow us to source targeting support for the replication and of the CEFS. The consortium will also purchase a specific platform specifically for the project used to store securely sensitive documentation and financial documentation.

Task 5.2: European Charter of CEFS (Lead: RES; M9 – M30)

To establish a common understanding, the consortium will work on the definition of a CEFS and create the ethical rules for a CEFS. The definition and the ethical rules of a CEFS will be laid down in a EU charter and signed by the participating partners. This will be based on an assessment of fundamental ethical and organisational values that the investment schemes will have to meet and key criteria and organisational principles that can be used to rate the effectiveness of such schemes for (different) stakeholders.

Reference shall be made to the ICA-principles and the charters from REScoop.eu. Moreover, based on the work performed in WP3, existing fund regulations will be studied and condensed in a charter that provides the guiding principles for future CEFS, its fundamental ethical values as well as the key criteria to judge qualifying CEFS in the future.

A consensus on core values and ethical standards within the Charter will be created using the following steps:
- Draft charter elaborated with the consultation of external stakeholders (ethical and cooperative banks and environmental movement representatives);
- Two validation workshops during consortium meetings;
- Charter approval by the consortium and publication.
The Charter will be a guiding document in setting up CEFS all over Europe and its definition will be essential in the regulatory frameworks.

Task 5.3: Create access to EU funds (Lead: RES; M9 – M36)
The goal of this task is to create access to EU capital for the national and regional CEFS. Starting with the already existing CEFS, the consortium partners will agree on how EU funds can contribute to these CEFS and what type of management (financial or organisational) is necessary to make the access as efficient as possible. The representative CEFS EU organisation (set-up in T5.1) will collectively negotiate the conditions for financing the CEFS. Throughout the set-up of the replication CEFS in other countries, the intermediate organisation will work to get these national CEFS funded by EU funds.

This task will be broken down in two steps:
- Step 1: carry out a review of the relevant funder and investors on a public and private sides — in collaboration with national partners, the team of RES will map the relevant public funding programs at the European and national levels. The team of RES will also carry out a mapping of private foundations and potential private funders. The team of RES will carry out a mapping of potential private and public investors.
- Step 2: develop a fundraising strategy and unique selling proposition for the EU intermediary — this should be developed in collaboration with existing contacts of RES and by carrying out a qualitative interview process with private investors and funders.

Task 5.4: European community of practice for feedback and refinement (Lead: RES; M12 – M36)
During the project development of a CEFS, feedback from the mentors, community energy leaders and financial institutions will be collected and used for shaping the EU intermediary (T5.1). In order to aggregate and open this process to a broad of experts from the community energy movement, we will create a Community of Practice (COP). This community may take the form of a Finance working group for EU energy cooperatives organised by REScoop.eu. This group will be composed of 10 experts selected amongst the members of the CEFM and outside of the consortium. Participants of the European COP will get involved to learn from others and express their experiences on a national or regional level. Their experience, ideas and suggestions are taken into account throughout the project and after. The feedback from the European Community of Practice will contribute to the refinement of the toolbox (WP3) through 3 workshops.

Work package WP6 – Policy research and adaption

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Objectives

The aim of this work package is to contribute to the wide-spread implementation of CEFS through additions of the relevant EU Sustainable Finance policy and legislation. In this work package, REScoop.eu will support the consortium on the regulatory side of creating CEFS. The goal will be to investigate the key pieces of legislation as well as institutions encouraging and impairing the development of community based financing schemes. This WP will also investigate the institutional financing streams available at the European level, and inform policy makers based on the experience of the consortium. With the use of the definition made in T5.2 it will support the partners in proposing regulatory frameworks that support the creation of CEFS in their country or region.

Description

Task 6.1 – Regulatory framework analysis (Lead: RES; M1-M12)
The aim of this task is to analyze the regulatory environment allowing for the successful development of CEFS. With the support of the countries where CEFS are operational (FR, NL, UK IRE), RES will perform an analysis of the legislative and financial frameworks. The analysis will cover the key pieces of legislation and supportive institutions allowing for the development of the funds. The output will be a report concluded with lessons learned in preparation for the report of T4.2.

The team of RES will carry out extensive interviews with the team of EPC and ENS in order to identify the key legal requirements for the development of CEFS. With the support of national partners through qualitative interviews, the team of RES will review key financial legislations to assess the feasibility of the creation of a CEFS in the target countries.
The team of RES will map, with the support of national partners, the potential institutions and partners that could support the creation of a CEFS at national level. The team of RES will also carry out qualitative interviews with a range of stakeholders at national level susceptible to support the creation of CEFS.

Task 6.2 – Enabling financial supporting framework analysis (Lead: RES; M6-M24)
The aim of this task is to analyze the regulatory and financial environment in the 5 replication countries (BE, DE, HR, ES, RO), in order to support the development of CEFS in those countries. How they are going to do this is written down in their action plan (T4.1). With the support of national partners in the replication countries, RES will perform an analysis of the key pieces of legislation and potentially supportive institutions to allow the creation of funds in those countries. The output of this task will be a report with recommendations for national policy makers looking to support the development of an enabling framework for CEFS in their country. The report will give suggestions on how the European Union and its financial partners can set up a financial supporting framework for community energy. This framework will describe what can be done in policy, regulations and the allocation of capital to support the growth of community energy in Europe.

Task 6.3 – Advocacy toward European and national policy makers (Lead: RES; M6-M36)
This task will aim at operationalizing the lessons learned and recommendations of T5.1 and T5.2. Partners will reach out to policy makers and institutional funders at the European, national and regional level to inform them about the potential of the creation of CEFS.

Task 6.4 – European policy recommendation and recommendations for a financial supporting framework for community energy. (Lead: RES; M18-M36)
This task will aim to analyse proposed European policies to support the development and scaling of CEFS. Specifically, our analysis will focus on the Recovery and Resilience fund, Cohesion Funds and Modernization funds where the EC could play a key role in supporting Member States to allocate funds toward CEFS. This task will also aim at providing recommendations to European institutions regarding potential changes in their lending policies to support the development of community energy projects.

Both documents T 6.2 and T6.3 and the experience in implementing the CEFS in new countries will result in a final report on financing community energy in Europe which will be published on our website and presented to key policy makers in Europe in a dedicated workshop on CEFS in Europe.

**Work package WP7 – Communication and dissemination**

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**Objectives**

To spread the project results, create an awareness about community energy financing, ensure the replication around Europe and make sure there will be a sustainable business for the intermediate organisation (WP5) the project results will be communicated throughout Europe. Communication is a key factor to create awareness of the necessity for CEFS. Many Energy Communities have newsletters and most of them actively use a website. We aim to reach as many energy communities and local, regional and national governments as possible in a given region and offer them the opportunity to participate in the project. The aim here is to broaden the communication about CEFS, their aims, key activities and expected impact throughout Europe.

**Description**

Task 7.1 - Communication Plan (BBE; M1-M36)
A detailed European communication plan will be developed in order to ensure the project’s visibility and support the effective dissemination of the ACCE outputs in direct relation with the Replication and Exploitation work package (WP5). ACCE will leverage the partners’ networks to reach out to relevant stakeholders in the focus countries and beyond.

Task 7.2 – Media and communication package and roll out (BBE; M1-M36)
A set of communication tools will be developed and tailored to the ACCE target groups. These include:
• A project visual identity: Logo, standard presentation format
• A website hosted as part of the RESeoOp.eu website will be used for knowledge systematisation and dissemination. This page will be hosted through a different link tree on the website of REScoop.eu and will include a user-friendly interface hosting all main content produced and allowing for easy access and download. Cross-linking and referencing with the partners’ websites as well as with other external platforms (including the Community Power Coalition, etc.) will be supported.
• A presentation flyer will be produced in the first phase of the project to inform relevant target groups about its objectives and expected impacts.
• Other online materials will be produced according to the specific project communication needs.
• A Podcast series with interviews and stories of committed energy community financing schemes and successful examples of CEFS.

We will further develop standard newsletter messages about the project for the partners newsletters. And a media package for European media including press releases, op-eds and podcasts which will be disseminated to main European media such as EU online portals and media focusing on sustainable energy and EU policies and EU institutions' communication departments. All CEFS will use local communication and media packages to ensure a wide replication of the project results in the targeted territories.

Task 7.3 - Dissemination to relevant stakeholders and initiatives through networks, media and EU events (BBE; M1 - M36)

ACCE will target relevant stakeholders and networks to disseminate information and target specific events organised by these structures to promote key ACCE tools or relevant learnings. It will also aim at communicating the project results and content during European events. A dedicated final event will be organised towards the end of the project (M36). The main target group for this event are policy makers, financial institutions, the Community of Practice members and energy communities.

Task 7.4 – Packaging of the Toolkit (BBE; M12-M36)

This task aims to provide an easy-to-read digest of the toolkit to inspire other communities and cooperatives around Europe wishing to replicate the CEFS models. The chapter descriptions will be supported by infographics and disseminated during the project capacity building workshops and final event as well as during most relevant national and European events in the years following the completion of the project.

Task 7.5 – Final dissemination report (BBE; M1-M34)

The project will prepare a final publishable report presenting the key results, main lessons learnt, and recommendations for the future. The final publication should be professionally designed, attractive and tailored to the target group. The content and final draft of the publishable report must be discussed with CINEA before publication.