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## 1. Introduction

This is a template for reporting the activities related to COOPENERGY WP5 “Replication to other European Regions” carried out by each regional partner.

This “transferability report” will serve as reference document for the replication activities and indicates the basic facts for building the specific twinning pair as the needs and expectations of the learning region, the specific areas of competence of the COOPENERGY expert partner and themes of collaboration for each pair of partners.

The replication is based on the RUR@CT Methodology ([www.ruract.eu](http://www.ruract.eu)) and modified taking into account results from the IEE projects ENNEREG and SEAP-Plus which both include Twinning in the context of the EU 2020 targets and SEAP development. The first step for building pairs will be to explore and identify the needs of the learning region (importing region). COOPENERGY partners (exporting region) will do a self-evaluation describing their specific areas of competence. Based on both of these factors, pairs will be proposed by the work package leader to ensure that promoting partners are able to answer the learning regions’ demands.

## 2. The RUR@CT Methodology adapted to COOPENERGY: Steps

The RUR@CT programme is composed of 10 steps, which have been simplified and adapted to COOPENERGY needs (see above) to the following 7 steps:

### **Step 1: Defining the expectations and needs of the importing regions**

This step is of utmost importance to make sure that the best practice transferred corresponds to a real need in the importing region. A template “Expectation and needs of the importing region” to fill in for step 1 is part of this document.

### **Step 2: Self-evaluation of COOPENERG partner to describe their areas of competence**

This step is to ensure, that COOPENERGY partner can provide useful best practice to the specific needs of the importing regions and that the best matches can be made. A template for doing the self-evaluation is part of this document.

### **Step 3: Comparative analysis and building pairs**

Based on step 1 and step 2, pairs will be proposed by the WP Leader Nenet and discussed and agreed with all COOPENERGY partners.

### **Step 4: Preparing the ground for visits: Organisational issues and Partnership Agreement**

Step 4 is about the preparing work that needs to be done for a successful implementation of the visits. Both exchange partners have to decide about

- whom they want to involve in the exchange (political representatives, institutions, technical experts....)
- the issues for the visits, both with respect to practical arrangements and content;
- A Partnership Agreement will be signed; a template will be proposed by the WP Leader Nenet. The Agreement should in the starting phase show willingness to work on MLG in sustainable energy; later, the Agreement will be revised according to the results of the twinning and signed again to show engagement to implement a MLG model.

#### **Step 5: Implementing exchange visits and providing remote support**

- In a first phase, the importing region will visit the exporting region. The visit could include a detailed presentation of which players are involved in the best practice, some kind of practical training, a study visit etc. This depends on the type of best practice and the needs of the importing region, but the programme should be developed jointly between the two partners.
- In the second phase, the exporting region will visit the importing region. The visit should ensure a good balance of activities, e.g. group discussions, interviews with key stakeholders in an open confidential atmosphere and enough time for discussing findings and conclusions.
- During the whole exchange process, the exporting region will provide remote support (Webinar, phone, mail) to the importing region if there is any need. The importing partner will also join the COOPENERGY collaboration platform which gives the possibility to network with all other partners and beyond.

#### **Step 6: Evaluating the bi-lateral transfer activities**

Both, the transfer process as such and, if applicable, the resulting operational implementation process, will be monitored and evaluated. Evaluation results will provide input to communication materials such as the MLG guidebook. A template for monitoring and evaluation will be provided by the WP Leader Nenet.

#### **Step 7: Promoting the bi-lateral transfer and engagement of the importing region**

Representatives for all twinning pairs will share their experience and promote the implementation of the MLG model to other regions. They will together participate in the final COOPENERGT conference.

#### **Timeline/Schedule WP 5**

Task 5.1: Identifying and selecting regions: April - June 2014

Task 5.2: Developing transferability model and building final pairs: July 2014 - October 2014

Task 5.3: Implementation of bi-lateral transfer activities: November 2014 - December 2015

Task 5.4: Evaluation of the bi-lateral transfer activities: January 2015 - April 2016

### 3. Expectations and needs of the learning region

Please clarify the needs and expectations of the learning region you are in contact with with respect to collaborative sustainable energy planning:

#### Expectations and needs of learning region

**Contact:**

Country:

Region:

Name of organisation/regional authority:

Contact person:

**Administrative framework**

**Mark the the main responsibilities the regional government has in relation with energy**

- Developing regional strategies
- Public buildings
- Public transport
- Energy network infrastructures or local energy production (planning, authorisation, operation,..)
- Energy and GHG monitoring
- Land use and spatial planning
- Others: .....

**Are you a regional public authority with official duty of working with municipalities in sustainable energy?**

- Yes
- No, it's not an official duty but we are experienced in this (e.g. through voluntary projects)
- No, and so far we have little experience in this
- We are not a public authority, but we are strongly collaborating with our regional authority and work with municipalities in sustainable energy

**Is there any budget or staff allocated for collaboration between regional and local level?**

- Yes
- No

**Motivation factors**

**What is the level of commitment with regards to EU2020 targets in your region?**

- We have a regional energy and climate strategy which reflects the EU2020 targets
- We are a regional supporting structure for the Covenant of Mayor or we are closely collaborating with the Covenant of Mayor in another way
- We are actively participating in European events and projects on sustainable energy
- We are member of European sustainable energy NGOs (which one?)
- others:.....

**We have a clear vision and a commitment to good governance and want to put this in practice in sustainable energy planning**

Yes

No

**We know from previous experience that collaboration in sustainable energy planning is important**

Yes, we implemented already collaboration models but want to improve our work

No, we don't have any experience, but see new challenges for which collaboration is essential

**Description of problem/challenge**

**What problem/challenge could the transfer help to solve (max 1000 signs)?**

**Is there any concrete targets that are linked to the problem and that should be reached? Any deadline to be kept? Any other initiatives linked to and to be recognised? (max 500 signs)**

**In which concrete field of work do you want to exchange experience with another region?**

financial instruments;

Modelling, planning and monitoring tools for decision making;

Awareness raising and stakeholder involvement instruments;

others, pls specify:

**Are there specific characteristics you expect from the exporting region you exchange with?**

#### 4. Self-evaluation of COOPENERGY partner

Please describe your own organisation's expertise and your best practice MLG model with respect to collaborative sustainable energy planning:

**COOPENERGY partner (name):**

**Main fields of expertise of the COOPENERGY partner**

**In which of these fields do your organisation have most expertise in terms of sustainable energy ? Give some details if useful.**

energy efficiency:

renewable energy:

sustainable transport:

land-use planning:

Covenant of Mayor/SEAPs:

working with business/SMEs:

working with public bodies/authorities/municipalities:

others, pls specify:

**In which concrete field of work do you want to exchange experience on MLG with another region?**

financial instruments;

Modelling, planning and monitoring tools for decision making;

Awareness raising and stakeholder involvement instruments;

others, pls specify:

**Give 1-3 example projects you are working with related to sustainable energy planning and/or MLG models**

**Description of MLG model in the region**

**Short summary of MLG model (best practice) in the region which could be replicated (max 1500 signs, give details about who are the key stakeholders, duration, targets, your role and how the model works in practice):**

**Which problems/challenges has the MLG model helped to solve?**

**Which results could be obtained?**

**Is there any budget? How much, who is in charge, how is it financed?**

**Evaluation of transferability for MLG model in the region**

**What are necessary technical conditions? (Human-means, skills, equipment...)**

**What are administrative and budget requirements?**

**Is any specific regulatory of legal framework necessary (e.g. obligation for municipalities to develop energy plans)**

**How much time is needed to implement the MLG and to produce first results?**

**Are there other decisive factors for success?**

**Is there any risk of undesirable effects linked to the implementation of the MLG model?**



## 5. Draft Memorandum of Understanding

*This draft MoU should be adapted to the twinning pair needs in the beginning of the Twinning. After completion of the Twinning, it will be revised to give a political validation by the learning region with respect to the decisions to import and implement a MLG model.*

### **Memorandum of understanding to cooperate on Multi-Level-Governance in energy planning between [Coopenergy partner] and [Learning Region]**

Considering that the policy of the European Union sets for 2020 a target for renewable energy sources (20% of total energy production), energy efficiency (20% increase), CO<sub>2</sub> emissions (20% reduction compared to 1990 levels) and biofuels (10% of total fuel consumed);

Considering that energy strategies have a relevant impact on social welfare and the environment, and need to be considered to build a society which is sustainable;

Considering the technological, social, economic and regulatory evolutions which have taken place since the approval of the [regional SEAP];

Considering the actions in the field of sustainable energy that have already been carried out in the region;

Considering that cooperation between regional and local authorities and other stakeholders is essential to improve the local and regional action on sustainable energy;

The [Coopenergy partner] and the [Learning Region] agree as follows:

#### **Agreement**

The collaboration between The [Coopenergy partner] and the [Learning Region] in the [theme of collaboration] is positive for the development of sustainable energy in the region.

The [learning region], which is the organization responsible for the [theme of collaboration in Learning region], will exchange experience with [Coopenergy partner] on [theme of collaboration] with a focus on Multi-Level-Governance models in energy planning and will

- Implement one study visit (up to 3 person, up to 3 days) to the [Coopenergy region] to learn more about best practices in place and to exchange experience;
- Host one visit of COOPENERG experts (2 persons, up to 3 days) to receive technical support on-site for the implementation of MLG-models and to facilitate experience exchange;
- Participate in evaluation of the process, giving feedback and information;
- participate in the final COOPENERGY conference;
- Join the online collaboration platform (free of charge) for further technical exchange.

The [Learning Region] will allocate the following resources for the twinning

- Travel costs for own staff when visiting the [Coopenergy partner];
- Local transport, meeting venues, meals/coffee break etc. when expert staff is visiting the importing region;
- Travel costs for participating in COOPENERGY final conference (to be discussed with the twinning expert organization).

The [Coopenergy region] will allocate and provide the following resources for the twinning:

- Staff costs for consultancy during visits and for remote support;
- Local accommodation expenses (hotel, meals, local transport, catering) when the [Learning Region] is visiting the [Coopenergy region];
- Travel costs to visit [Learning Region];
- Travel costs for participating in COOPENERGY final conference (to be discussed with the twinning expert organization).

The [Learning Region] will consider ideas or proposal received from the [Coopenergy partner] and will consider their inclusion in [theme of collaboration; regional SEAP].

The Participants agree to allow the [COOPENERGY PARTNER] to document the activities carried out under this agreement as part of the activities of the Coopenergy Project of the Intelligent Energy - Europe (IEE) programme which has the objective of improving cooperation between regional and local authorities in sustainable energy planning through multi-level governance models.

Nothing in this agreement is of a legally enforceable nature and consequently no liability shall be attached to either party in the event of its failure to carry out any of the terms of the MoC. Each party is responsible for the way in which it carries out its undertakings under this agreement, and no liability shall be attached to the other party as a result.

Nothing in this MoC shall be construed as giving the right to any party to represent the other towards third parties including the press and media and no right of agency shall therefore be construed. The parties are therefore free to terminate the MoC at any time.

This MoC shall be effective upon its signature by the Participants

[Participant 1]

[Participant 2]

Signature

Signature

Name:

Name:

Date:

Date:

## 6. Themes of collaboration

### Themes of collaboration and description on good practices

**Learning pair:**

**Theme of collaboration**, e.g. Enhancing local renewables or Improve climate policy framework

**Barriers in learning region:**

**Short description (max 1500 signs) of good practice from Coopenergy region to overcome barriers and/or other means of supporting learning region**

(s. self-evaluation, copy where applicable)

- Which problems/challenges has the MLG model helped to solve?
- Which results could be obtained?
- Budget, resources allocated?
- What are necessary framework conditions? (Human-means, skills, equipment...)
- Is any specific regulatory or legal framework necessary (e.g. obligation for municipalities to develop energy plans)
- How much time is needed to implement the MLG and to produce first results?
- Are there other decisive factors for success?
- Is there any risk of undesirable effects linked to the implementation of the MLG model?
- Recommendation for replicability: 1 paragraph
- Link: Further material
- Photo with subtitle if available

## 7. Template: Quality Management of the Replication Process

Communication history for establishing partnership <sup>1</sup>		
Date:	Time:	Means <sup>2</sup> :
Issues discussed:		
Date:	Time:	Means:
Issues discussed:		
Date:	Time:	Means:
Issues discussed:		

### Description in-depth observation visit from learning region in promoting region

Date:

Objectives of visit:

Issues to be addressed:

Proposed visit programme & short description of the activities that will take place:

Material that will be used/ distributed:

Expected results & added value for the partners:

Added value for third parties:

Next steps of collaboration:

Comments:

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<sup>1</sup> Communication activities of the partners that should be mentioned as pivotal in formulating the frame and content of the visit to the experienced partner. Add more lines if necessary

<sup>2</sup> E-mail, phone call, teleconference, Skype, etc

**Description technical on-site support visit from promoting region to learning region**

Date:

Objectives of visit:

Issues to be addressed:

Proposed visit programme & short description of the activities that will take place:

Material that will be used/ distributed:

Expected results & added value for the partners:

Added value for third parties:

Next steps of collaboration:

Comments:

**Description remote support for learning**

Date:

Objectives of visit:

Issues to be addressed:

Proposed visit programme & short description of the activities that will take place:

Material that will be used/ distributed:

Expected results & added value for the partners:

Added value for third parties:

Next steps of collaboration:

Comments:

## 8. Action Plan Report Implementation of MLG Model

**Theme of collaboration: About which concrete field is the MLG model that is to be implemented?**

financial instruments; give detail

Modelling, planning and monitoring tools for decision making; give detail

Awareness raising and stakeholder involvement instruments; give detail

others, pls specify:

**Give a short description of the MLG model**

- Name of the MLG model
- Time plan (start, duration, milestones, end)
- Application, e.g. Energy efficiency
- Topic, e.g. Cooperation in Regional SEAP design
- Which concrete problems/challenges is the MLG model intended to solve?
- What are the elements that led to that decision, why was this solution chosen?
- Organisational structure, partnership and operating procedure, responsibilities (Governance)
- Expected results
- Financing and costs, financial plan
- Further material, Photo with subtitle if available
- Contact

**Indicators for performance and for the results, e.g.**

- Stimulated investments in Euro
- CO<sub>2</sub>-saving in ton Co<sub>2</sub>
- Energy savings in MWh
- Job creating
- Involvement of key stakeholders (give evidence for improved involvement)
- Improved collaboration between local and regional authorities (give evidence)

**Comments**

## 9. Evaluation Template Transfer Process

**Twinning pair:**

**Themes of collaboration**

**Transfer process**

Duration of the transfer process (date of first contact, date of operation start, date of meetings, date of final contact if any)

Key players involved in the transfer process:

Description of key stages of the transfer

- Main stages in the process
- Means and methods of experience exchange
- Means of assessing transferability for good practice
- Key agreements

Short summary of replicated best practice MLG model

Results [decision made on MLG model, implementation of projects, etc]

Next steps

Difficulties encountered

Lessons and possible improvements to method, comments