



MANAGEMENT AND BUSINESS PLAN

investment action

SUMMARY OF THE ACTION IN ENGLISH

Describe the main features of the action. (1 page)

SUMMARY OF THE ACTION IN NATIONAL LANGUAGE

Describe the main features of the action. (1 page)

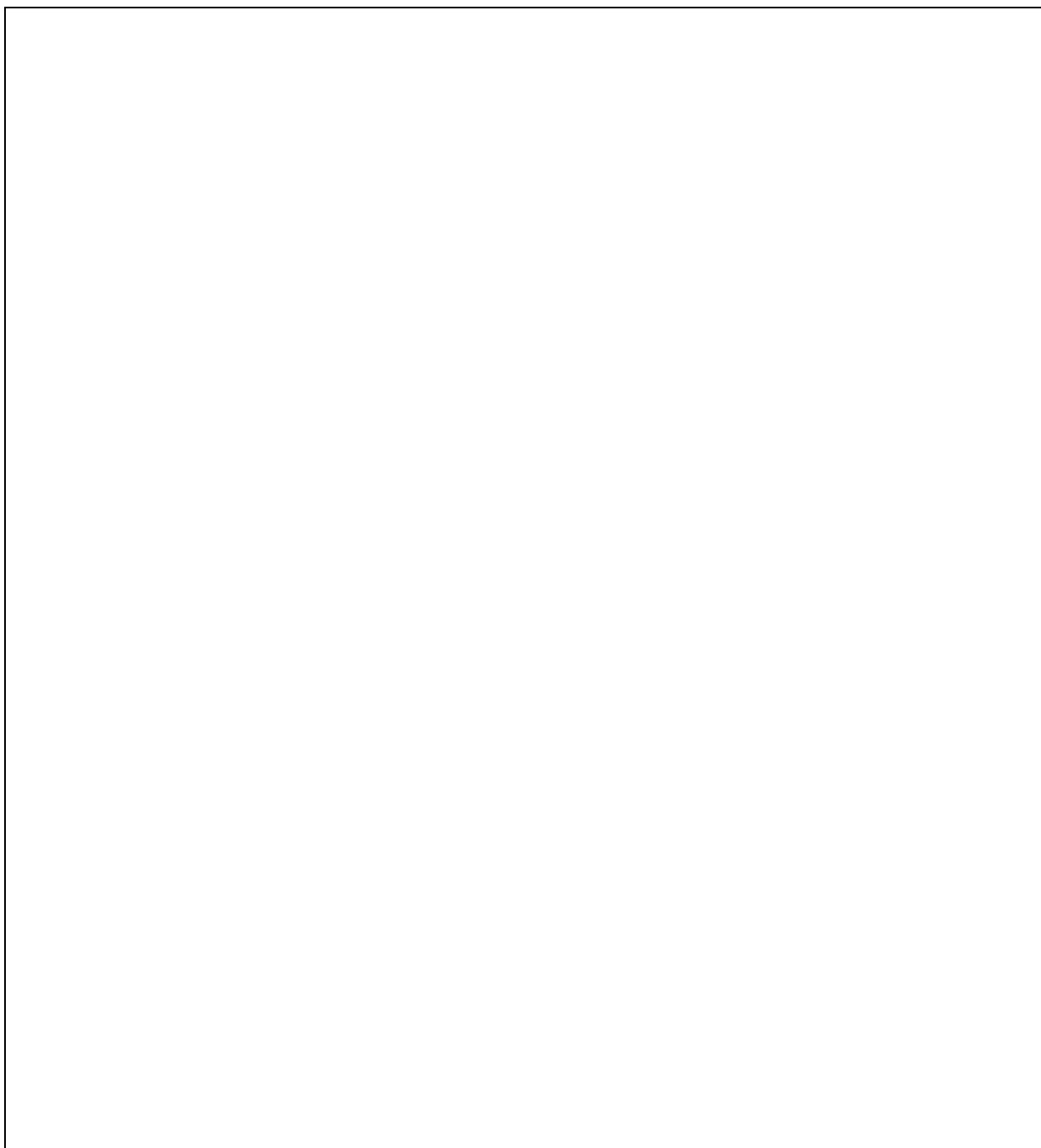


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1. Strategic Framework

Summarize the **objectives** of the action considering the SEAP of the municipality (5-10 lines).

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Describe the **added value** of the action (5-10 lines).

Describe the **legal framework** and political basis of the action (5-10 lines).

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2. Description of the action

Describe in few words the **topic of the action** (5-10 lines).

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*Describe in few words the **site of intervention** (5-10 lines).*

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Describe the **technical features** of the action (1/2 to 1 pages), including:

- Available material (i.e. attach preliminary planning, description of the action in the SEAP)
- Description of the technical parameters
- Technical design
- Technology employed
- Number of interventions
- Preliminary data collection - Baseline (BEI, other data)
- Target / beneficiaries

Describe the **implementation plan** of the action (1-2 pages): current situation, activities to be implemented for the purposes of project realization, milestones:

- Survey / data collection
- Communication campaign / scouting
- Financial scheme
- Design of the tender - awarding of the contract
- Works
- Monitoring

Describe the **project expected results and outputs** (1/2 – 1 page):

- *Environmental aspects: produced or avoided carbon emissions; air-water-soil improvement; indirect reduction of emissions through public awareness on energy use, other environmental costs and benefits. Energy savings, energy production and CO₂ savings.*
- *Technical results (building comfort / mobility improvement / other benefits)*
- *Social and political results (local job creation)*

Describe potential **threats and risks** associated to the project (1/2 page):

- *Local acceptability*
- *Difficulties in getting funds*
- *Tender unattended*

3. Financial aspects

Describe the **budget** and the **financial aspects** of the project (1 to 2 pages):

- Planned expenses according to the different steps of the project:
- Location of the assets to be assured within the budget

| # | Budget item | Implementation costs (€) |
|--------------|--------------------------|--------------------------|
| 1 | Organization (staff) | € |
| | External expertise | € |
| | Communication campaign | € |
| 2 | Project training | € |
| 3 | Dissemination activities | € |
| 4 | Monitoring activities | € |
| Total | | € |

Please provide:

- Detailed description of each type of investment,
- Foreseen benefit in terms of fostered investments
- Information on the investor (who is responsible for the economic resources),
- Simple payback time of the action,
- Indicators, where it's possible (NPV, ROI Return of investment , NPV/Co)
(See excel tool attached for the calculation of the indicators)

| Type of investment | Investor | Beneficiary | € |
|---|----------|-------------|---|
| Electrical and thermal devices with more efficient technologies (pumps, lamps, boilers) | | | € |
| Renewable energy plants (photovoltaic and solar thermal systems) | | | € |
| General refurbishment (Structural measures) | | | € |
| | | | € |
| | | | € |

Describe funding and opportunities (1/2 page):

- *Funding schemes,*
- *Incentives or other financial opportunities related to this action*
- *Co-funding sources and rates*
- *How the above mentioned points could affect the pay-back time of this action*

4. Project management

Describe the **human resources** involved in the action (1/2 page):

- a. *Staff attribution and assignment of responsibilities*
 - i. *who is responsible for the project implementation (which department...) (one person for economic and legal requirements, one person for project implementation).*
 - ii. *If appropriate, a working group with local stakeholders is promoted and facilitated.*
- b. *Specific needs and limitations within the project: assessment of the needed external expertise for out-sourcing of SEAP action development/supervision.*
- c. *Involvement of external stakeholders.*
- d. *Training*
 - i. *Training of stakeholders*
 - ii. *Training of internal staff*
 - iii. *Training of specific staff (i.e. auditors)*

5. Schedule

Describe the GANTT chart of the action, with the foreseen start and finish dates and summary elements, to give an idea of the work breakdown structure of the implementation plan.

| Implementation plan <i>Please use the implementation plan steps</i> | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 | Month 9 | Month 10 | Month 11 | Month 12 | Month 13 | Month 14 | Month 15 |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|----------|----------|----------|----------|----------|----------|
| 1. Fund study / Data collection | X | X | X | | | | | | | | | | | | |
| 2. Dialogue with Municipalities and data collection | X | X | X | | | | | | | | | | | | |
| 3. Application preparation | | X | X | | | | | | | | | | | | |
| 4. Obtainment of the fund | | | | X | X | | | | | | | | | | |
| 5. Feasibility study preparation | | | | | | X | X | X | | | | | | | |
| 6. Design of the tender | | | | | | | | X | X | X | X | | | | |
| 7. Awarding of the contract | | | | | | | | | | | | X | | | |
| 8. Works | | | | | | | | | | | | | X | X | X |
| 9. Monitoring | | | | | | | | | | | | | X | X | X |

6. Tender procedure

Describe the **tender procedure and procurement** (1/2 to 1 page), in case the type of action and the legislative framework request it. They are prepared and launched through the following steps:

- Exploration of possibilities for bundling and tendering works for plants / facilities / energy efficiency works
- Support from the procurement office of the municipality
- Establishment of the evaluation procedures for the selection of tenders
- Establishment of the most adequate type of tender (competitive dialogue, bid, etc.)

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7. Project Communication and Dissemination

Describe planned **communication and dissemination activities** (1/2 to 1 page), including:

- Internal communication (between different departments and stakeholders directly involved in the project and aiming at ensuring good coordination of activities)
- External communication (with the general public and aiming at promotion and dissemination of the project, obtaining feedback, etc.)

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8. Monitoring of Project Implementation

Describe **quality control, control of realized outputs** (1/2 page): highlighting the set of indicators and quality control. Following 50001 Management System example, they could be as follow:

- Xxxx
- Yyyy
- Zzzzz

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9. Final Provisions

Describe all the **final provisions** of the project (1/2 page)

- Political commitment and future developments.
- Contacts

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