Approfondimenti Quadro Logico

|Manuela Masutti|

14.04.2021

IL NUOVO QUADRO LOGICO

FOCUS SUGLI INDICATORI

Nuovo quadro logico di EuropeAid

Nel 2015, l’Unione Europea in alcuni bandi di EuropeAid ha introdotto un nuovo modello QL

	Catena dei risultati	Indicatori	Valore di base (indicare anno)	Valore corrente (indicare data)	Valore obiettivo (indicare anno)	Fonti e mezzi di verifica	Ipotesi
Obiettivo generale: impatto							
Obiettivo/i specifico/i: risultato/i (*outcome*)							
Realizzazioni e prodotti (*output*)							
Attività		**Mezzi**: Risorse necessarie per realizzare le attività (personale, attrezzature, formazione, studi/ricerche, fornitori, soluzioni operative). **Costi**: Preventivo dettagliato dei costi.					Fattori esterni al progetto

È scomparsa la riga degli Expected results, gli outputs non rappresentano più quel livello intermedio che connetteva le attività ai risultati

Novità

Gli **Obiettivi Specifici** (al plurale e non più un unico) ora sono gli **outcomes**, cioè gli effetti ottenuti dal progetto nel medio periodo; sono suddivisi in outcomes finali (Oc) e in outcomes intermedi (iOc)

La **colonna Baseline**, nella quale riportare i dati (valori di partenza) sul problema che si intende affrontare (analisi di contesto) a inizio progetto

La colonna **Current value**, e la relativa Reference date (necessaria ad aggiornare i valori in corso di progetto)

La colonna **Targets**, che non fa riferimento ai "beneficiari", **bensì al livello qualitativo o quantitativo misurabile** che si intende raggiungere **rispetto agli indicatori a fine progetto**, per ciascuno dei livelli della **Results chain** (output, outcome o impact)

Attenzione particolare alla questione di genere (richiede che tutti gli **indicatori siano disaggregati** per sesso)

Dagli outputs e nella colonna Assumptions, il QL non cambia….si concentra sui deliverables, sulle attività, le risorse necessarie, i costi da sostenere e i fattori esterni che potrebbero impattare sul legame fra outputs e outcomes

QL vs NQL

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- **Overall objective** = **Impact**
- **Intervention logic (QL) = Results chain (NQL)**

“the intervention logic tells how, in a given context, the activities will lead to the outputs, the outputs to the outcome(s) and the outcome(s) to the expected impact” (indicazione della connessione consequenziale fra activities, outputs, outcome(s) e impact)

≠

NQL il **concetto di results ora include gli output, gli outcome e l’impact**

- **outcome** definiscono la dimensione collegata al **cambiamento** (di comportamenti ecc.)
- gli “**output**” sono “i **prodotti**, i beni e i servizi che derivano dall’implementazione delle attività” o, ancora meglio, come ““i **risultati diretti/tangibili** (infrastrutture, beni e servizi) **prodotti dal progetto”**

Baseline, Current Value e Targets

Novità interessante tre nuove colonne sugli indicatori

- **Baseline** riporta **i dati (valori di partenza)** per ogni indicatore previsto nel QL
- **Targets** fa riferimento **al livello qualitativo o quantitativo misurabile e che si intende raggiungere entro un periodo di tempo da specificare o a fine progetto, rispetto agli indicatori** per ciascuno dei livelli della results chain (output, outcome e impact)
- **Current Value** dovrebbe essere **utilizzata per aggiornare i dati** di ciascun indicatore in corso di progetto, in particolare al momento della presentazione dei **rapporti intermedi e nel rapporto finale**

Queste tre nuove colonne e i relativi dati fanno riferimento a indicatori (qualitativi e quantitativi)

Il nuovo modello rende indispensabile che i progetti si basino su dati rilevati in modo rigoroso

Compilare le colonne Baseline, Current Value e Targets

La **Baseline**

- rappresenta i valori di ogni indicatore prima della realizzazione di un progetto
- indispensabile per misurare lo stato di avanzamento di un progetto
- aiuta ad identificare quale cambiamento è avvenuto per ogni livello della results chain alla fine del progetto
- utile per le valutazioni finali richieste dal finanziatore per verificare l'impatto generato o atteso dal progetto
- **utile per il monitoraggio costante dello stato di avanzamento** nel raggiungimento dei risultati

Compilare le colonne Baseline, Current Value e Targets

Il current value

è la **baseline aggiornata** e dovrà essere compilato successivamente alla presentazione del progetto

può quindi essere vuoto nel momento di presentazione ed essere riempito al momento dell’avvio del progetto e negli step di monitoraggio intermedi

Compilare le colonne Baseline, Current Value e Targets

I TARGETS

descrivono in **termini concreti** i **risultati dell'investimento** fatto dal finanziatore sul progetto

i targets sono **gli specifici e pianificati valori degli indicatori selezionati, da raggiungere:**

- **entro la fine del progetto** nel caso di **outcomes e outputs**
- **e nel lungo periodo,** con il contributo di altre azioni (interventions) di altri soggetti (partnership) e in presenza di determinate condizioni, nel caso dell'**impact**

Indicatori di ’Overall objective/Impact’

si devono utilizzare indicatori che misurano il cambiamento a lungo termine a cui il progetto contribuisce e che, idealmente**, deve essere estratto dalla strategia dei partner**

se i partner del progetto non hanno strategie chiare o indicatori misurabili e misurati già definiti, come accade nella maggior parte dei casi,

questi indicatori si possono anche **prendere in “prestito” dalle politiche a livello Paese,** facendo riferimento a **documenti e statistiche ufficiali dei ministeri** e anche ai **documenti strategici del finanziatore a sostegno delle politiche nazionali/europee**

Indicatori di outcome/obiettivo specifico

Viene chiesto di **descrivere il cambiamento generato a fine progetto**

Le scelte a livello di Obiettivo Generale possono guidare l'identificazione **degli indicatori di** outcome, che si presentano **maggiormente problematici sia in fase di definizione sia in fase di monitoraggio e valutazione**.

Per cercare di definire bene la variabile da misurare, occorre **tenere in mente chi sono i beneficiari del cambiamento e cosa deve cambiare rispetto ai comportamenti, alle percezioni o nel sistema, entro la fine del progetto.**

Ogni outcome a prescindere dall'importo o dalla grandezza, avrà i suoi indicatori definiti su misura

Indicatori di output

viene chiesto di indicare il **grado di consegna o raggiungimento degli outputs**

Normalmente non ci dovrebbero essere grandi problemi, essendo questi **espressi principalmente con dei dati "numerici"** che si rifanno interamente alla **misurazione di quei beni e servizi che sono il prodotto (i deliverables) delle attività di progetto**

Aspetto comune ai tre livelli di indicatori specificati nel NQL: gli indicatori, se rilevante, devono essere **disaggregati per genere**

Gli indicatori possono essere quantitativi o qualitativi

Un **indicatore quantitativo**, misura variabili che possono essere espresse con dati in percentuale o in valore assoluto

Per Ind. outcome, ad esempio, si dovrebbe conoscere il dato relativo alla totalità della popolazione o al gruppo di riferimento (beneficiari intesi come generica tipologia) all'interno del quale si è identificato il gruppo di beneficiari diretti del progetto che si sta presentando

Avendo questi dati a disposizione, si dovrebbe essere in grado di elaborare **un indicatore che misuri il cambiamento previsto, confrontando le variazioni nei dati raccolti prima, durante e dopo l'azione**

Gli indicatori possono essere quantitativi o qualitativi

Un **indicatore qualitativo**, che può anche essere numerico, andrà a misurare, ad esempio, la percezione del cambiamento, le opinioni da parte del gruppo target o il livello di acquisizione di una competenza

Si dovranno allora **prevedere degli strumenti (surveys, interviste ecc.) che ne permettano la misurazione, avendo molta cura nell'individuazione della fonte di verifica (attendibile, consistente, significativa).**

gli indicatori qualitativi, sono più legati a valutazioni soggettive, devono essere tradotti in dati numerici tutte le volte che ciò è possibile e misurano aspetti quali la qualità, le opinioni, le competenze, le percezioni, l'influenza… generati dall'intervento

Fonti di verifica

Se nel vecchio QL veniva semplicemente chiesto quali fossero le **fonti di verifica**,

nel nuovo modello di QL viene richiesto anche il **metodo utilizzato per raccogliere i dati**, oltre alla **frequenza** e al **responsabile della raccolta e dell'analisi**

Un buon metodo di raccolta dati dovrebbe:

- utilizzare possibilmente una fonte preesistente e facilmente consultabile
- specificare da dove vengono presi i dati (ad es. rapporti o interviste), evitando di indicare solamente l'organizzazione o la fonte
- identificare una fonte che sia rilevante e venga incontro ai nostri bisogni
- essere affidabile, e quindi anche stabile e consistente nel tempo
- essere disponibile, con un accordo chiaro rispetto alla responsabilità dei vari partner per la raccolta dei dati e per l'invio dei rapporti periodici

ESEMPIO Tabelle di indicatori richieste dai format di H2020

TOPIC : Project Development Assistance

Topic identifier: EE-22-2016-2017

Publication date: 14 October 2015

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Types of action: CSA Coordination and support action

DeadlineModel:

Opening date: single-stage

15 March 2016 Deadline: 15 September 2016 17:00:00

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http://www.eurosportelloveneto.it/public/doc/2017/Buone%20prassi%20di%20project%20management.pdf

PUNTI DI FORZA E DEBOLEZZE DI UNA PROPOSTA PROGETTUALE:

IL PUNTO DI VISTA DEL VALUTATORE

IL PROCESSO DI VALUTAZIONE

Una proposta di successo

Qual è una proposta di successo?

Una proposta che viene finanziata

Quali proposte vengono finanziate?

Vista l'alta competizione che si è riscontrata in Horizon 2020, le proposte che vengono finanziate sono quelle che ottengono punteggi molto alti il più delle volte compresi tra

15/15 ed **14/15**

Quando si redige una proposta progettuale è molto utile pertanto conoscere bene il processo di valutazione ed i criteri di valutazione….

… è fondamentale 'mettersi nei panni' dei valutatori…..

Come vengono selezionati i valutatori dalla Commissione Europea?

I valutatori sono scelti all'interno del DATABASE di esperti della Commissione

Sono esperti indipendenti con:

competenze di alto livello, esperienza e conoscenza nelle aree rilevanti non solo tecnico scientifiche, ma anche "trasversali" (es. project management, innovazione, comunicazione, disseminazione e valorizzazione dei risultati, sostenibilità)

Per ogni proposta valutata la Commissione Europea cerca di garantire un bilanciamento di:

- Conoscenze, competenze, esperienza
- Provenienza geografica
- Genere
- Settore pubblico o privato (se rilevante)
- Turnover annuale

Come avviene il processo di valutazione

I valutatori, all'inizio del processo di valutazione sono invitati a partecipare a un WEB BRIEFING.

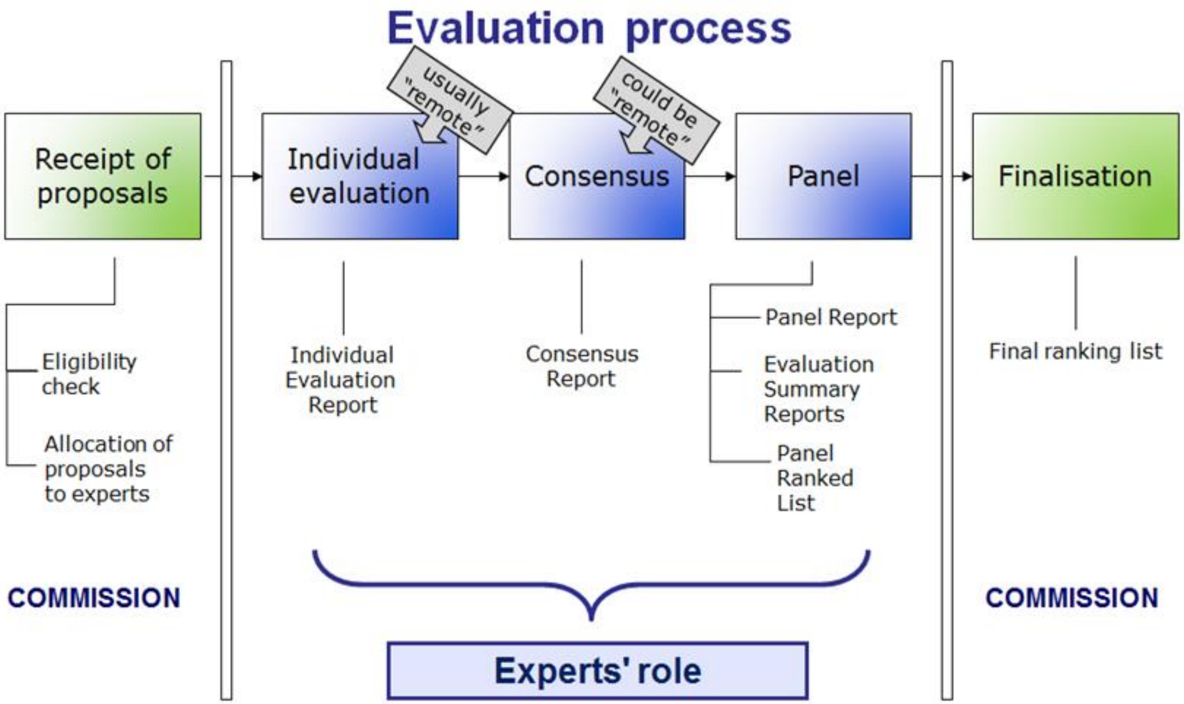
Tutto il processo di selezione degli esperti e le modalità di valutazione sono pubblici:
https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/work-as-an-expert

http://ec.europa.eu/research/participants/data/support/expert/h2020_expert-briefing_en.pdf

Parte delle informazioni che trovate in questa presentazione sono state estrapolate direttamente da materiali forniti dalla Commissione Europea

Per questo le slide successive sono in inglese

STEPS IN THE PROCESS



Come avviene il processo di valutazione

There are three main phases in the experts' involvement in the evaluation process.

Before starting their work, **experts are briefed** on evaluation procedures (including remote evaluation), the topics of the relevant calls for proposals and the terms of their contracts. This briefing can be done in Brussels or remotely (e.g. web-streaming).

For each proposal, experts presents their evaluation results in an **individual evaluation report,** explaining the evaluation scores. All evaluation forms are completed online. This report can be completed and signed remotely or in Brussels.

In principle, proposals will be evaluated initially by at least three experts (in a number of cases, five or more).

STEPS IN THE PROCESS

A **consensus group** is convened in order for all the experts who assessed the proposals in question to discuss the individual evaluation reports and agree on comments and scores.

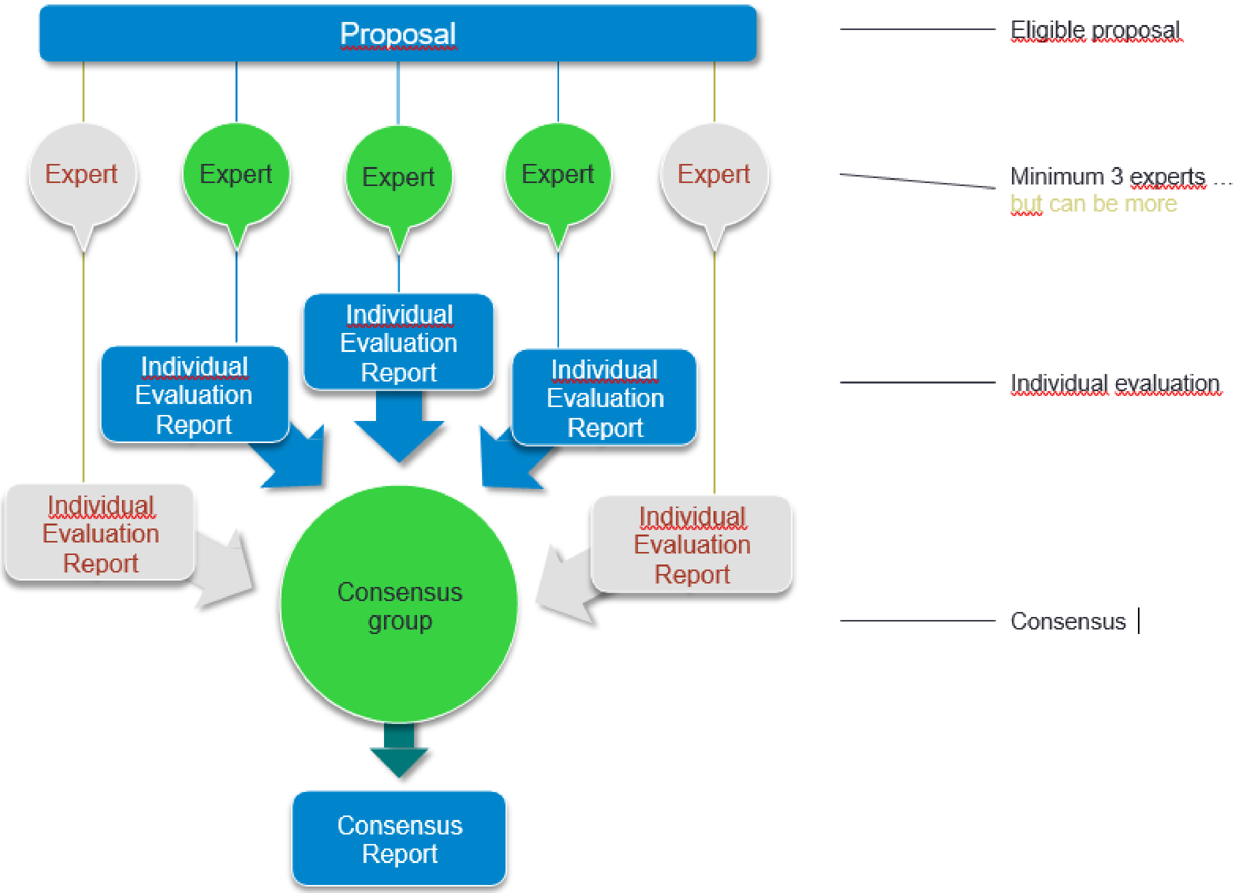
The consensus group discussion is led by a moderator (normally a Commission/Agency official), who seeks a consensus and ensures that proposals are evaluated in a fair manner and in line with the established criteria.

The consensus group discussion results in a **consensus report** including justifications of scores and dissenting views, if any.

The report is signed by the rapporteur and the experts evaluating the proposal discussed.

The discussion usually takes place in Brussels and includes experts who participated in the individual evaluation. It is also possible to convene a remote consensus group.

Evaluation Process



STEPS IN THE PROCESS

Panel review consists of reviewing all the proposals within a call, or part of a call, to:

- ensure that the consensus groups have been consistent in their evaluations;
- if necessary, propose a new set of marks or comments; and
- resolve cases where a consensus could not be reached and a minority view was recorded in the consensus report.

The panel review is led by a **panel chairperson** (normally a Commission/Agency official) who ensures fair and equal treatment of the proposals.

The panel review should result in a **panel report** which includes the **evaluation summary report** for each proposal, a list of proposals passing all thresholds, along with a final score, (**panel ranked list**) and, where necessary, the panel's recommendations for priority order in the event of equal scores, using the procedure set out in the work programme.

A rapporteur may be appointed to draft the panel report.

Admissibility, eligibility checks and additional requirements

Admissibility is checked by Commission/Agency:

– Readable, accessible and printable

– Completeness of proposal, presence of all requested forms

– Inclusion of a plan for exploitation and dissemination of results (n/a first stage of two stage proposals or unless otherwise specified in the WP)

Evaluation criteria

There are **three evaluation criteria** for full proposals:

– **Excellence** (relevant to the description of the call or topic)
– **Impact**
– **Quality and efficiency of the implementation**

The criteria are adapted to each type of action, as specified in the WP

The evaluator must refer to that text in the work programme when evaluating impact

✓ For the first stage of a two-stage procedure, only the aspects of the criteria in **bold** are evaluated

Excellence

To the extent that the proposed work corresponds to the topic description in the work programme:

- **Clarity and pertinence of the objectives**
- **Soundness of the concept, and credibility of the proposed methodology**
- **Extent that proposed work is beyond the state of the art, and demonstrates innovation potential (e.g. ground-breaking objectives, novel concepts and approaches, new products, services or business and organizational models)**
- **Appropriate consideration of interdisciplinary approaches and , where relevant, use of stakeholder knowledge and gender dimension in research and innovation content.**

Impact

- **The expected impacts listed in the work programme under the relevant topic**
- Any substantial impacts not mentioned in the WP, that would enhance innovation capacity; create new market opportunities, strengthen competitiveness and growth of companies, address issues related to climate change or the environment, or bring other important benefits for society
- Quality of proposed measures to exploit and disseminate project results (including IPR, manage data research where relevant);communicate the project activities to different target audiences

Implementation

- Quality and effectiveness of the work plan, including extent to which resources assigned in work packages are in line with objectives/deliverables
- Appropriateness of management structures and procedures, including risk and innovation management
- Complementarity of the participants and extent to which the consortium as a whole brings together the necessary expertise
- Appropriateness of allocation of tasks, ensuring that all participants have a valid role and adequate resources in the project to fulfill that role

Interpretation of the scores

0 - The proposal **fails to address the criterion** or cannot be assessed due to missing or incomplete information.

1- **Poor**. The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 - **Fair**. The proposal broadly addresses the criterion, but there are significant weaknesses.

3 - **Good**. The proposal addresses the criterion well, but a number of shortcomings are present.

4 - **Very Good**. The proposal addresses the criterion very well, but a small number of shortcomings are present.

5 - **Excellent**. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Pertanto

I valutatori devono:

- Valutare l'eccellenza sulla base di quanto previsto WP
- Valutare l'impatto sulla base di quanto previsto dal WP
- Valutare l'implementazione sulla base di quanto previsto dal WP
- Valutare una proposta così com'è
- Rispettare i punti previsti dai tre Criteri nella valutazione
- Utilizzare gli score secondo il loro significato

Suggerimenti base

- Predisporre un abstract chiaro (i valutatori lo leggono per primo)
- Scrivere una proposta sintetica, chiara e leggibile
- Usare elenchi puntati e una chiara suddivisione dei paragrafi
- Nella descrizione dei WPs "andare subito al punto" e se utile usare anche rappresentazioni grafiche
- Chiedere a un collega che non ha partecipato alla progettazione e scrittura di leggere la proposta sulla base degli Evaluation Form per individuare i punti deboli e gli aspetti mancanti

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IL NUOVO QUADRO LOGICO

FOCUS SULLE ATTIVITA’ e BUDGET

Come si ricava il budget?

Partiamo dalla descrizione delle attività del QL

E' importante **descrivere l'attività** in modo da rendere evidente **l'importanza dell'attività rispetto al risultato da raggiungere**:

Attività (formazione, incontro, convegno, costruzione di un database, sviluppo di uno studio/documentazione specialistica ecc..)

Durata:
Data di inizio:
Luogo:
Budget:
Staff coinvolto (partner/esperti) :
Contributo al risultato/outcome n°:
Output dell'attività:

Esempio

Attività 1: workshop

Durata: 4 giorni

Data di inizio: Mese 3 del progetto (come riportato nel GANTT)

Luogo: Trieste oppure workshop online

Budget: 1.800 euro (include eventuali viaggi, affitto sale, traduzioni ecc.)

Staff coinvolto (partner/esperti): staff del progetto (coordinatore del progetto/project manager, esperto tecnico, amministrazione), 1 esperto esterno, 2 traduttori

Contributo al risultato n°:

Output dell'attività: report

I mezzi e i costi

Le risorse umane e fisiche

per ogni singola attività si indicano le risorse di cui si potrà avere bisogno

Facciamo un esempio di queste due tipologie di risorse

A1.1. Realizzare una ricerca sulle cause più frequenti di fallimento di start-up in un determinato territorio.

Le *risorse umane* richieste potrebbero essere:

- 1 ricercatore senior per 2 mesi;
- 1 ricercatore junior per 1 mese;

Le *risorse fisiche* potrebbero configurarsi in:

- 1 PC portatile per 2 mesi;
- 1 mezzo per 15 giorni;
- bibliografia e report vari acquistati da banche dati specialistiche;
- fotocopie (circa 1000 copie).

I mezzi e i costi

Le risorse finanziarie

il progetto analizzerà per **ogni singola risorsa descritta (fisica o umana)** quale sarà il suo **costo** per **stabilire il costo di ogni singola attività o workpackge**

L'insieme dei **costi previsti per *tutte* le attività ci darà il valore monetario del progetto** nel suo insieme.

Tali dati raccolti saranno indispensabili per redigere il budget finale del progetto che sarà compilato in accordo le linee guida e i formulari predisposti dagli enti finanziatori (ogni programma di finanziamento europeo ha proprie linee guida e formulari).

Strumenti e diagrammi base per preparare il budget, ma che sanno utili anche per la gestione e il monitoraggio del progetto

Gli strumenti di gestione che possono aiutare alla definizione del budget

- il diagramma dei tempi, cronogramma o diagramma di Gantt
- il diagramma delle risorse umane
- il diagramma delle risorse fisiche
- il diagramma delle risorse finanziarie

Il diagramma delle risorse umane

Questo strumento consente di mostrare le risorse umane che il progetto ha pianificato di utilizzare per ogni singola attività e per unità di tempo.

Attività Unità di tempo	1° mese	2° mese	3° mese	4° mese
Realizzazione seminario iniziale	5 gg. esperto formazione 2 gg. logista 15 gg. segreteria	10 gg. esperto formazione 10 gg.segreteria		
Preparazione e lancio corso xgiovani		10 gg. esperto formazione 15 gg. sociologo-pedagogo 15gg. segreteriacontroparte		
Erogazione formazione giovani			8 gg. formatore 8 gg. esperto formazione 8 gg. tutor	4 gg. formatore 4 gg. tutor
Acquisto equipaggiamento scuola	5 gg. logista			
Preparazione programmi E selezione dei docenti			5 gg. esperto formazione 16gg.Esperti di settore 8 gg. segreteria	
Realizzazione seminario finale				2 gg. esperto formazione 2 gg. esperto di settore 2 gg. logista 15 gg. segreteria

Il diagramma delle risorse fisiche

risorse fisiche: acquisto di beni o servizi includendo sia materiali, merci, beni mobili e immobili, sia affitti, utenze, servizi bancari, ristorazione e altro.

Unità di tempo/attività	mese 1	mese 2	mese 3	mese 4
Realizzazione seminario iniziale		1 sala per 3 giorni 90 coperti pranzo + 90 break caffè materiale cartaceo e informatico di supporto in 30 set		
Preparazione e lancio corso x giovani		Redazione programma formativo e documentazione da distribuire		
Erogazione formazione giovani			1 aula attrezzata x 9 gg. caffè x 120 unità	1 aula attrezzata x 3 gg. Macchina caffè x 60 unità materiale cartaceo e informatico 20 set
Affitto materiale scuola	10 computer con relativa connessione internet 1pacchetto di assistenza tecnica annuale 1 scanner 1 server			
Preparazione programmi x docenti				
Realizzazione seminario finale				1 sala per 2 giorni 60 coperti pranzo + 60 coffee break materiale cartaceo e informatico di supporto in 30 set

Il diagramma delle risorse finanziarie

Prima è necessario **reperire il costo unitario delle risorse descritte nei diagrammi precedenti**

In questa tabella si quantifica in termini monetari gli input che il progetto ha pianificato di utilizzare per ogni singola attività e per unità di tempo

Attività/ Unità di tempo	**1° mese**	**2° mese**	**3° mese**	**4° mese**	**Totale per attività**	**% sul totale**
Realizzazione seminario iniziale	costi risorse umane + fisiche	costi risorse umane + fisiche				
Preparazione e lancio corso x giovani	costi risorse umane + fisiche	costi risorse umane + fisiche				
Erogazione formazione giovani						
Affitto materiale scuola						
Preparazione programmi x docenti						
Realizzazione seminario finale						
Totale per mese						

Il budget

il budget è uno strumento che, insieme al cronogramma, va predisposto contestualmente alla proposta di progetto;

non esiste una tipologia di budget standard: ogni ente finanziatore richiede una propria tipologia budget.

Esistono però due approcci possibili, largamente utilizzati e richiesti, il **“budget per attività” e il “budget per capitoli di spesa”**

Il budget per capitoli di spesa è tipologia di budget più comune e utilizzata

Le linee guida del finanziatore prescelto, in particolar modo i costi ammissibili e non ammissibili di ogni singolo *item*, fungeranno da guida per discriminare l’allocazione delle risorse all’interno di ogni *item*

(ESEMPIO H2020)

Participant	Country	(A) Direct personnel costs/€	(B) Other direct costs/€	(C) Direct costs of sub-contracting/€	(D) Direct costs of providing financial support to third parties/€	(E) Costs of inkind contributions not used on the beneficiary's premises/€	(F) Indirect Costs/€ (=0.25(A+B-E))	(G) Special unit costs covering direct & indirect costs	(H) Total estimated eligible costs/€ (=A+B+C+D+F+G)	(I) Reimburse-ment rate	(J) Max. grant / € (=H*I)	(K) Requested grant / €
		0	0	0	0	0	0	0	0	100	0	0
Total		0	0	0	0	0	0	0	0		0	0

CATEGORIE DI COSTO

- **spese dirette del personale**
- **costi diretti dei subcontratti**; Il sub-contratto è un accordo tra un beneficiario e un terzo: “per svolgere una parte del lavoro del progetto senza una diretta supervisione e senza subordinazione”
- **altri costi diretti**
- **costi indiretti:** sono i costi della struttura del beneficiario di natura tecnica, amministrativa e logistica

verificare sempre:

- le spese ammissibili
- eventuali parametri di costo da rispettare
- criteri per l’imputazione di costi generali
- il costo del project management di regola non deve superare il 10% del costo totale del progetto

Summary of staff effort

	WPn	WPn+1	WPn+2	Total Person Months per Participant
Participant Number/Short Name				
Participant Number/Short Name				
Participant Number/Short Name				
Total Person Months				

‘Other direct cost’ items (travel, equipment, infrastructure, other goods and services)

Participant Number/Short Name	Cost (€)	Justification
Travel		
Equipment		
Other goods and services		
Total		

Direct cost of Sub-contracting

Participant Number/Short Name	Cost (€)	Justification
Total sub-contracting		

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ESEMPIO CALL H2020 – IMPATTO ed INDICATORI

http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/4099-ee-22-2016-2017.html

TOPIC : Project Development Assistance

Topic identifier: EE-22-2016-2017
Publication date: 14 October 2015

Types of action:	CSA Coordination and support action		
DeadlineModel:	single-stage	**Deadline:**	15 September 2016 17:00:00
Opening date:	15 March 2016		

Time Zone : (Brussels time)

Horizon 2020H2020 website
Pillar: Societal Challenges
Work Programme Year: H2020-2016-2017
Work Programme Part: 'Secure, Clean and Efficient Energy'
Call : H2020-EE-2016-2017 Call budget overview

Topic Description

Specific Challenge:

As underlined in the Investment Plan for Europe, there is continued need for building a solid and transparent pipeline of sustainable energy investment projects to help the EU unlock additional investments and in order to demonstrate their financial viability and attractiveness, in particular, to private investors. Whilst there is already a significant pipeline of large scale renewable energy projects, investors and lenders need to gain more confidence on investment projects related to energy efficiency which are still seen as risky and fragmented. EU added value can be obtained in particular where projects introduce innovation to the market regarding project aggregation and financing solutions minimising transaction costs and engaging the private finance community as well as where projects demonstrably remove legal, administrative and other market barriers for mainstreaming large scale sustainable energy investment schemes.

Scope:

Project Development Assistance (PDA) will be provided to public and private project promoters such as public authorities or their groupings, public/private infrastructure operators and bodies, energy service companies, retail chains, estate managers and services/industry. The aim of the action is thus to build technical, economic and legal expertise needed for project development and leading to the launch of concrete investments.

The proposed investments will be launched before the end of the action which means that projects should result in signed contracts (or launched tendering procedures as appropriate) for sustainable energy investments to that effect, e.g. construction works, energy performance contracts, turnkey contracts.

The PDA focusses on the sectors of existing public and private buildings; street lighting; retrofitting of existing district heating/ cooling; energy efficiency in urban transport (such as transport fleets, the logistics chain, e-mobility, modal change and shift) in urban/sub-urban agglomerations and other densely populated areas and energy efficiency in industry and services.

Whilst proposals may address investments into distributed, small-scale renewable energy sources in combination with energy efficiency, the main focus should lie on capturing untapped high energy efficiency potentials.

Proposals should have an exemplary/showcase dimension in their ambition to reduce energy consumption and/or in the size of the expected investments. Proposals should also deliver organisational innovation in the financial engineering (e.g. on-bill financing schemes, guarantee funds, or factoring funds) and/or in the mobilisation of the investment programme (e.g. bundling, pooling or stakeholder engagement). Innovation should be demonstrated taking into account the state-of-the-art.

In addition, proposals should demonstrate a high degree of replicability and include a clear action plan to communicate experiences and results towards potential replicators across the EU.

This PDA facility focuses on small and medium-sized energy investments of at least EUR 7.5 million to EUR 50 million[1].

The Commission considers that proposals requesting a contribution from the EU of between EUR 0.5 and 1.5 million would allow this specific challenge to be addressed appropriately. Nonetheless, this does not preclude submission and selection of proposals requesting other amounts.

Expected Impact:

Proposed actions are expected to demonstrate the impacts listed below (**wherever possible, use quantified indicators and targets**):

- Delivery of a series of sustainable energy investment projects and innovative financing solutions and/or schemes;
- Every million Euro of Horizon 2020 support should trigger investments worth at least EUR 15 million.
- Primary energy savings, renewable energy production and investments in sustainable energy triggered in the territory of participating parties by the project within its duration (respectively in GWh/year and million Euro of investments per million Euro of EU funding),
- Demonstration of innovative and replicable investment financing solutions, documenting feedback/uptake from potential replicators.

ESEMPIO TEMPLATE

Proposal template
(technical annex)

Coordination and support actions

For Call: H2020-EE-2016-CSA
Topic EE-22 (Project Development Assistance)

- *This document must contain only the cover page and sections 1, 2 and 3 of the proposal. It is subject to the page limit indicated below.*
- *Note: Sections 4 and 5 of the proposal (see separate template) must be uploaded to the submission system as a separate document. It is not subject to page limit.*
- *Note: For Topic EE-22 proposals may be submitted by only one legal entity established in a Member State or associated country.*

Please follow the structure of this template when preparing your proposal. It has been designed to ensure that the important aspects of your planned work are presented in a way that will enable the experts to make an effective assessment against the evaluation criteria. Sections 1, 2 and 3 each correspond to an evaluation criterion for a full proposal.

Please be aware that proposals will be evaluated as they were submitted, rather than on their potential if certain changes were to be made. This means that only proposals that successfully address all the required aspects will have a chance of being funded. There will be no possibility for significant changes to content, budget and consortium composition during grant preparation.

Page limit: The cover page, and sections 1, 2 and 3, together should not be longer than 50 pages. All tables in these sections must be included within this limit. The **minimum font size allowed is 11 points**. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers).

The page limit will be applied automatically; therefore you must remove this instruction page before submitting.

If you attempt to upload a proposal longer than the specified limit, before the deadline you will receive an automatic warning, and will be advised to shorten and re-upload the proposal. After the deadline, any excess pages will be overprinted with a 'watermark', indicating to evaluators that these pages must be disregarded.

Please do not consider the page limit as a target! It is in your interest to keep your text as concise as possible.

Check for Frequently Asked Questions (FAQ) in the relevant section of the Participant Portal.

COVER PAGE

Acronym

Title of Proposal

List of participants

Participant No *	Participant organisation name	Country
1 (Coordinator)		
2		
3		

* Please use the same participant numbering as that used in the administrative proposal forms.

Table of contents

1. Excellence

Your proposal must address topic EE-22 "Project Development Assistance" set out in the work programme of the H2020 Energy Efficiency Call for proposals.

⚠ *This section of your proposal will be assessed only to the extent that it is relevant to that topic.*

1.1 Objectives

- Describe the specific objectives for the project[1], which should be clear, measurable, realistic and achievable within the duration of the project. Objectives should be consistent with the expected exploitation and impact of the project (see section 2). Describe strategic objectives that the investments will contribute to after the end of the project (paving the way for further projects using the same approach etc.). Explain what will be the added value of the project development assistance (PDA) grant, and what would happen if your project did not get European support.

1.2 Relation to the work programme

- Indicate the work programme topic to which your proposal relates, and explain how your proposal addresses the specific challenge and scope of that topic, as set out in the work programme. Explain how your proposal will deliver organisational innovation in the financial engineering and/or the mobilisation of the investment programme. Innovation should be demonstrated taking into account the state-of-the-art. Explain the exemplary/showcase dimension of your proposal.

- Demonstrate how your proposal involves relevant target groups and key actors.

⚠ *Letters of Support from your target groups and key actors supporting your proposal or demonstrating interest in the project's results can be uploaded in the corresponding Annex of the electronic submission system.*

1.3 Concept and methodology, quality of the coordination and support measures

- Describe and explain the overall concept underpinning the project. Describe the main ideas, models or assumptions involved.

- Describe previous activities which your proposal will build on, such as similar investment projects as well as inventories, audits, feasibility studies, market studies, business plans, commitments of financing institutions, local energy action plans (e.g. Sustainable Energy Action Plans) etc. related to your proposed investment scheme. If applicable, describe any national or international research and innovation activities which will be linked with the project, especially where the outputs from these will feed into the project.

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[1] The term 'project' used in this template equates to an 'action' in certain other Horizon 2020 documentation.

- Describe and explain the overall methodology.

- Describe which specific needs the proposed action addresses. Explain how the proposed action is embedded in the local planning or in the corporate strategy. Depending on the nature of your project, describe the starting point, the geographical boundary, the population, the assets or the stakeholders concerned etc.

⚠ *You may wish to enclose documents presenting the background of your project, such as a Sustainable Energy Action Plan, corporate strategy, feasibility studies, surveys etc. They can be uploaded in the corresponding Annex 'Background documents' of the electronic submission system.*

- Where relevant, describe how sex and/or gender analysis is taken into account in the project's content.

⚠ *Sex and gender refer to biological characteristics and social/cultural factors respectively. For guidance on methods of sex / gender analysis and the issues to be taken into account, please refer to http://ec.europa.eu/research/swafs/gendered-innovations/index_en.cfm?pg=home.*

2. Impact

2.1 Expected impacts

⚠ *Please be specific, and provide only information that applies to the proposal and its objectives. Wherever possible, use quantified indicators and targets.*

- Describe how your project will contribute to the expected impacts set out in the work programme, under the relevant topic.

- Quantify the impact of your project within its duration on the basis of the indicators provided in the table below:

Project Performance Indicator	Quantification	Measurement unit
Investments in sustainable energy triggered (in the territory of participating parties) by the PDA project within its duration[2]		EUR
Total requested funding		EUR
Leverage factor[3]		

[2] Investment costs should only refer to energy investments, i.e. investments which are directly related to or required for energy savings and/or renewable energy generation. Investment costs should include VAT only for entities which cannot reclaim it.
[3] Total cost of (planned) sustainable energy investments divided by total requested funding. Every million Euro of Horizon 2020 support should trigger investments worth at least EUR 15 million.

Project Performance Indicator	Quantification	Measurement unit
Energy savings triggered (in the territory of participating parties) by the project within its duration		Primary energy savings triggered (GWh/year)
Renewable energy production triggered (in the territory of participating parties) by the project within its duration		Renewable energy production triggered (GWh/year)
Building capacities and skills		Number of people with increased capacity

⚠ *Explain in a concise, yet robust manner, your baselines, benchmarks and assumptions for the estimates. Your estimates must relate to this project only; the impact of other initiatives should not be taken into account.*

⚠ *Regarding the conversion from final energy consumption into primary energy consumption: for savings in kWh electricity you may apply a default coefficient of 2.5 reflecting an estimated 40% average EU generation efficiency. You may apply a different coefficient at national/regional level provided that it can be justified.*

⚠ *Data need to be given in the requested units i.e. gigawatt hours of primary energy per year (GWh/year) for primary energy savings and renewable energy produced. If needed, the IEA energy unit converter can be used to do the necessary conversions (http://www.iea.org/stats/unit.asp).*

- Include in the work plan (section 3 of this template) a specific task for monitoring the performance indicators.
- Provide a detailed description for each type of investment in terms of background, nature and expected results and complete table 2.1a; this table shows the minimum elements to provide, but should be adapted depending on the nature of your proposed investments.
- Specify which evidence you plan to provide for the investments at the end of the project (table 2.1b).
- Describe how your proposed action will build and retain technical, economic and legal expertise within your/participating organisation(s).
- In case you need to use additional indicators to measure the impact of your action, please indicate them and provide for each of them the targets by the end of the action.
- Describe any barriers/obstacles, and any framework conditions (such as regulation and standards), that may determine whether and to what extent the expected impacts will be achieved. (This should not include any risk factors concerning implementation, as covered in section 3.2.).

Table 2.1a: Detailed description of the proposed investments

⚠ *If you address several investment sectors[4], you may adapt this table and/or provide separate tables.*

Investment sector: (please specify)											
#	*Location (area, town…)*	*Type of investment[5]*	*Description of the investment*	*Quanti-fication[6]*	*Total surface (m^2)[7]*	*Current energy consump-tion[8]*	*Energy savings (%)*	*Renewable energy production (MWh/year)[9]*	*Other quantifications[10]*	*Payback time*	*Energy investment costs (thousands €)[11]*
1											
2											
3											
4											
5											
6											
…											
	Total/average										

[4] The PDA focuses on sectors of existing public and private buildings; street lighting; retrofitting of existing district heating/cooling; energy efficiency in urban transport (such as transport fleets, the logistics chain, e-mobility, modal change and shift) in urban/sub-urban agglomerations and other densely populated areas and energy efficiency in industry and services.

[5] Specify the type of investment, e.g. investment in lamps, controllers, types of buildings, power generation, network refurbishment, smart metering, IT, vehicle charging station etc. Use a separate row in the table for each type of investment.

[6] Specify the number of investments and an appropriate unit, e.g. x number of lamps, schools, meters etc.

[7] Complete only if your investments target buildings.

[8] Specify current level of energy consumption together with an appropriate measurement unit, e.g. x kWh/m²/a for buildings; x MWh/year, …

[9] Only if applicable

[10] Please specify as appropriate, e.g. installed power capacity; number of charges by consumers per year; number of customers; load shedding capacity; …

[11] Only include investment costs which are directly related or required to realise the energy savings and/or renewable energy generation.

Table 2.1b: Evidence of the investments

#	Type of investment	Evidence of the investment	Actor issuing the evidence	Related deliverable number(s)
1				
2				
...				

2.2 Measures to maximise impact

a) Dissemination and exploitation of results

- Proposals should demonstrate a high degree of replicability and include a clear action plan to communicate experiences and results towards potential replicators across the EU.

- Provide a draft '**plan for the dissemination and exploitation of the project's results'**. Please note that such a draft plan is an admissibility condition, unless the work programme topic explicitly states that such a plan is not required.

- Show how the proposed measures will help to achieve the expected impact of the project.

- The plan should be proportionate to the scale of the project, and should contain measures to be implemented both during and after the end of the project.

- Explain how you will document the key steps in your process towards the planned energy investments and make them available and ready to use for potential replication.

⚠ *Your plan for the dissemination and exploitation of the project's results is key to maximising its* ***impact****. This plan should describe, in a concrete and comprehensive manner, the* ***area*** *in which you expect to make an impact and* ***who*** *are the potential users of your results. Your plan should also describe* ***how*** *you intend to use the appropriate channels of dissemination and interaction with potential users.*

⚠ *Consider the full range of potential users and uses, including research, commercial, investment, social, environmental, policy-making, setting standards, skills and educational training where relevant.*

⚠ *Your plan should give due consideration to the possible* ***follow-up*** *of your project, once it is finished. Its exploitation could require additional investments, wider testing or scaling up. Its exploitation could also require other pre-conditions like regulation to be adapted, or value chains to adopt the results, or the public at large being receptive to your results.*

- Include a business plan where relevant.

- If you will take part in the pilot on **Open Research Data**[12], include information on how the participants will manage the research data generated and/or collected during the project, in particular addressing the following issues:[13]

    - What types of data will the project generate/collect?

    - What standards will be used?

[12] Certain actions under Horizon 2020 participate in the 'Pilot on Open Research Data in Horizon 2020'. All other actions can participate on a voluntary basis to this pilot. Further guidance is available in the H2020 Online Manual on the Participant Portal.

[13] For further guidance on research data management, please refer to the H2020 Online Manual on the Participant Portal.

- How will this data be exploited and/or shared/made accessible for verification and re-use? If data cannot be made available, explain why.
- How will this data be curated and preserved?

⚠ *You will need an appropriate consortium agreement to manage (amongst other things) the ownership and access to key knowledge (IPR, data etc.). Where relevant, these will allow you, collectively and individually, to pursue market opportunities arising from the project's results.*

⚠ *The appropriate structure of the consortium to support exploitation is addressed in section 3.3.*

- Outline the strategy for **knowledge management and protection**. Include measures to provide **open access** (free on-line access, such as the 'green' or 'gold' model) to peer-reviewed scientific publications which might result from the project[14].

⚠ *Open access publishing (also called 'gold' open access) means that an article is immediately provided in open access mode by the scientific publisher. The associated costs are usually shifted away from readers, and instead (for example) to the university or research institute to which the researcher is affiliated, or to the funding agency supporting the research.*

⚠ *Self-archiving (also called 'green' open access) means that the published article or the final peer-reviewed manuscript is archived by the researcher - or a representative - in an online repository before, after or alongside its publication. Access to this article is often - but not necessarily - delayed ('embargo period'), as some scientific publishers may wish to recoup their investment by selling subscriptions and charging pay-per-download/view fees during an exclusivity period.*

b) Communication activities

- Describe the proposed communication measures for promoting the project and its findings during the period of the grant[15]. Measures should be proportionate to the scale of the project, with clear objectives. They should be tailored to the needs of different target audiences, including groups beyond the project's own community. Where relevant, include measures for public/societal engagement on issues related to the project.

3. Implementation

3.1 Work plan – Work packages and deliverables

Please provide the following:

- brief presentation of the overall structure of the work plan;
- timing of the different work packages and their components (Gantt chart or similar);

[14] Open access must be granted to all scientific publications resulting from Horizon 2020 actions. Further guidance on open access is available in the H2020 Online Manual on the Participant Portal.

[15] For further guidance on communicating EU research and innovation guidance for project participants, please refer to the H2020 Online Manual on the Participant Portal.

- detailed work description, i.e.:
    - a description of each work package (table 3.1a)
    - a list of work packages (table 3.1b);
    - a list of major deliverables (table 3.1c);
- description of how the investment scheme will be organised, what actors you will involve and their roles. Include an explanation on the legal relationships between them and how you will secure their participation. Describe how you will finance the investment (equity, debt, tax rebates, grants, …) and provide key financial performance indicators. Describe how you will procure works and services;
- graphical presentation of the components showing how they inter-relate (Pert chart or similar).

Give full details. Base your account on the logical structure of the project and the stages in which it is to be carried out. Include details of the resources to be allocated to each work package. The number of work packages should be proportionate to the scale and complexity of the project. Resources assigned to work packages should be in line with their objectives and deliverables.

You should give enough detail in each work package to justify the proposed resources to be allocated and also quantified information so that progress can be monitored, including by the Commission.

You are advised to include a distinct work package on 'Management' (see section 3.2), and to give due visibility in the work plan to 'dissemination and exploitation' and 'communication activities', either with distinct tasks, or possibly distinct work packages.

You will be required to include an updated (or confirmed) plan for 'dissemination and exploitation' in both the mid-term and final reports. (This does not apply to topics where a draft plan was not required.) This should include a record of activities related to dissemination and exploitation that have been undertaken, and those still planned. A report of completed and planned communication activities will also be required.

If your project is taking part in the Pilot on Open Research Data[16], you must include a 'data management plan' as a distinct deliverable within the first 6 months of the project. A template for such a plan is given in the guidelines on data management in the H2020 Online Manual. This deliverable will evolve during the lifetime of the project in order to present the status of the project's reflections on data management.

Definitions:

'Work package' means a major sub-division of the proposed project.

[16] Certain actions under Horizon 2020 participate in the 'Pilot on Open Research Data in Horizon 2020'. All other actions can participate on a voluntary basis to this pilot. Further guidance is available in the H2020 Online Manual on the Participant Portal.

'Deliverable' means a distinct output of the project, meaningful in terms of the project's overall objectives, and constituted by a report, a document, a technical diagram, a software etc.

3.2 Management structure and procedures

- Describe the organisational structure and the decision-making (including a list of milestones (table 3.2a)).

  Definitions:
  'Milestones' means control points in the project that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development.

- Explain why the organisational structure and decision-making mechanisms are appropriate to the complexity and scale of the project.

- Describe, where relevant, how effective innovation management will be addressed in the management structure and work plan.

Innovation management is a process which requires an understanding of both market and technical problems, with a goal of successfully implementing appropriate creative ideas. A new or improved product, service or process is its typical output. It also allows a consortium to respond to an external or internal opportunity.

- Describe any critical risks, relating to project implementation, that the stated project's objectives may not be achieved. Detail any risk mitigation measures. Please provide a table with critical risks identified and mitigating actions (table 3.2b).

3.3 Consortium as a whole

The individual members of the consortium are described in a separate section 4. There is no need to repeat that information here.

- Describe the consortium. How will it match the project's objectives, and bring together the necessary expertise? How do the members complement one another (and cover the value chain, where appropriate)? In what way does each of them contribute to the project? Show that each has a valid role, and adequate resources in the project to fulfil that role.

- If applicable, describe the industrial/commercial involvement in the project to ensure exploitation of the results and explain why this is consistent with and will help to achieve the specific measures which are proposed for exploitation of the results of the project (see section 2.2).

- **Other countries and international organisations**: If one or more of the participants requesting EU funding is based in a country or is an international organisation that is not automatically eligible for such funding (NB: entities from Member States of the EU, from Associated Countries and from one of the countries in the exhaustive list included in General Annex A of the work programme are automatically eligible for EU funding), explain why the participation of the entity in question is essential to carrying out the project.

3.4 Resources to be committed

⚠ *Please make sure the information in this section matches the costs as stated in the budget table in section 3 of the administrative proposal forms, and the number of person months shown in the detailed work package descriptions.*

Please provide the following:

- a table showing number of person months required (table 3.4a);
- a table showing 'other direct costs' (table 3.4b) for participants where those costs exceed 15% of the personnel costs (according to the table in section 3 of the administrative proposal forms);
- if applicable, a table showing subcontracting costs (table 3.4c).

Tables for section 3.1

Table 3.1 a: Work package description

For each work package:

Work package number		**Lead Beneficiary**					
Work package title							
Participant number							
Short name of participant							
Person months per participant:							
Start month				End month			

Objectives

Description of work (where appropriate, broken down into tasks), lead partner and role of participants Task n.1 Task n.2 Task n.x Role of participants:

Deliverables (brief description and month of delivery)

Table 3.1 b: List of work packages

Work package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person Months	Start Month	End month
				Total months		

Table 3.1 c: List of Deliverables[17]

Deliverable (number)	Deliverable name	Work package number	Short name of lead participant	Type	Dissemination level	Delivery date (in months)

KEY

Deliverable numbers in order of delivery dates. Please use the numbering convention <WP number>.<number of deliverable within that WP>.

For example, deliverable 4.2 would be the second deliverable from work package 4.

Type:

Use one of the following codes:

R: Document, report (excluding the periodic or final report)
DEC: Websites, patents filing, market studies, press & media actions, videos, etc.
OTHER: Software, technical diagram, etc.

Dissemination level:

Use one of the following codes:

PU = Public, fully open, e.g. web
CO = Confidential, restricted under conditions set out in Model Grant Agreement
CI = Classified, information as referred to in Commission Decision 2001/844/EC.

Delivery date

Measured in months from the project start date (month 1)

[17] If your action is taking part in the Pilot on Open Research Data, you must include a data management plan as a distinct deliverable within the first 6 months of the project. This deliverable will evolve during the lifetime of the project in order to present the status of the project's reflections on data management. A template for such a plan is available on the Participant Portal (Guide on Data Management).

Tables for section 3.2

Table 3.2 a: List of milestones

Milestone number	Milestone name	Related work package(s)	Due date (in months)	Means of verification

KEY
Due date
Measured in months from the project start date (month 1)

Means of verification
Show how you will confirm that the milestone has been attained. Refer to indicators if appropriate. For example: a laboratory prototype that is 'up and running'; software released and validated by a user group; field survey complete and data quality validated.

Table 3.2b: Critical risks for implementation

Description of risk (indicate level of likelihood: Low/Medium/High)	Work package(s) involved	Proposed risk-mitigation measures

Definition critical risk:

A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.

Level of likelihood *to occur:* **Low/medium/high**

The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.

Tables for section 3.4

Table 3.4a: Summary of staff effort

Please indicate the number of person months over the whole duration of the planned work, for each work package, for each participant. Identify the work-package leader for each WP by showing the relevant person-month figure in bold.

	WPn	WPn+1	WPn+2	Total Person Months per Participant
Participant Number/Short Name				
Participant Number/Short Name				
Participant Number/Short Name				
Total Person Months				

Table 3.4b 'Other direct cost' items (travel, equipment, infrastructure, other goods and services)

Please complete the table below for each participant if the sum of the costs for' travel', 'equipment', and 'other goods and services' exceeds 15% of the personnel costs for that participant (according to the budget table in section 3 of the proposal administrative forms).

Participant Number/Short Name	Cost (€)	Justification
Travel		
Equipment		
Other goods and services		
Total		

Table 3.4c Direct cost of Sub-contracting[18]

If applicable, please complete the table below for each participant (according to the budget table in section 3 of the proposal administrative forms).

Participant Number/Short Name	Cost (€)	Justification

[18] For reference: Annotated Model Grant Agreement, Article 13 (http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf)

Total sub-contracting		