



EUROPEAN CITY FACILITY
Deliverable 2.9
Online monitoring form



EUCF
European City Facility



This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement No 864212.

Version number	Date	Organisation name	Comments
V0.1	05/11/2020	adelphi	Draft
V0.2	27/11/2020	adelphi	Incorporation of comments from Consortium

Quality check	Status	Date	Comments
Quality Manager ENC	<i>Ok</i>	<i>06/07/21</i>	
Project Coordinator ENC	<i>ok</i>	<i>06/07/21</i>	

The Purpose: The purpose of the EUCF online monitoring form is to provide an overview on key figures of the results and impacts achieved through the implementation of the investment concept by beneficiaries. Moreover, the collection of data through the monitoring forms allows to identify and assess the impacts of the EUCF and collect feedback from beneficiaries on the provided support. The figures and results collected through the form will be used for impact assessment of the EUCF, as well as for drawing recommendations for future programmes.

Definitions:

EASME – Executive Agency for Small and Medium-sized Enterprises

ESCO – Energy Service Company

EU – European Union

EUCF – European City Facility

Disclaimer:

The sole responsibility of this publication lies with the author. The European Union and EASME are not responsible for any use that may be made of the information contained therein.



EUCF
European City Facility



EUROPEAN CITY FACILITY

Online monitoring form



This project has received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No 864212. The sole responsibility of this publication lies with the author. The European Union or EASME are not responsible for any use that may be made of the information contained therein.

EUCF Online monitoring form

[Title of the investment concept]

Monitoring period: [MM.YYYY – MM.YYYY]

EUCF beneficiaries are asked to notify the EUCF on the implementation of their investment concepts by submitting a simple monitoring form twice (i.e. after one and two years from the positive validation of the investment concepts). The monitoring form aims to provide the EUCF team with key figures on the progress and outcomes of the investment concept implementation which are used to assess the impacts of the EUCF.

A. Summary of the investment concept implementation¹	
Status of investment concept implementation	<p>Please indicate the current status of implementation of the investment concept.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Not started yet Since the validation of the investment concept, no activities have been undertaken to start the implementation process. <input type="checkbox"/> In planning phase Planning activities for the implementation of the investment concept are currently conducted, such as identifying and approaching suitable investors, preparing/finalising the work plan and resource allocation, etc. <input type="checkbox"/> In negotiation phase Negotiation activities for the implementation of the investment concept are currently conducted, such as consultations and meetings with potential investors, discussions on contractual agreements, etc. <input type="checkbox"/> In procurement phase Procurement activities for the implementation of the investment concept are currently conducted, such as preparation and launch of tendering procedures, analysis and selection of companies to provide goods, works or services, contracting of companies, etc. <input type="checkbox"/> In implementation phase The investment concept is currently implemented. Activities such as construction and renovation works, substitution of equipment, new installations, etc. are conducted. <input type="checkbox"/> Implemented The investment concept has been implemented by the beneficiary. No further activities are necessary for its implementation. <input type="checkbox"/> Others <p>For others, please specify</p>
Activities conducted after investment concept validation	<p>Please briefly describe the status of implementation of the investment concept and the activities conducted during the monitoring period, as well as the main milestones and achievements. The activities can be listed as bullet points, if preferred. - (max. 1,000 characters, including spaces)</p>
Total investment as approved by the municipality/local authority or grouping	EUR
Funding sources	Please indicate the composition of the total investment.

¹ All values incl. VAT, if not reclaimable.

	<i>Requested funding</i>	EUR/...%		
	<i>Own funding</i>	EUR/...%		
	<i>Other sources [please specify]</i>	EUR/...%		
	Please indicate the funding source(s) that have been used to mobilise finance for the investment concept implementation.			
	<input type="checkbox"/>	Commercial bank		
	<input type="checkbox"/>	Development bank		
	<input type="checkbox"/>	EU funding streams (e.g. European Structural and Investment Funds, H2020 Project Development Assistance, European Local Energy Assistance)		
	<input type="checkbox"/>	Energy Service Company (ESCO)		
	<input type="checkbox"/>	Others		
	In case of other funding sources, please specify			
Access to finance	How difficult do you consider the access to funding sources with the investment concept? Please use the scale from 1-5 below to state your answer.			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	1 - Very easy	2 - Easy	3 - Moderate	4 - Difficult
				5 - Very difficult
Location(s) of investment	Please state the name of the municipality(ies)/local authority(ies) where the investment project is located.			
Expected impacts after investment concept implementation	<i>Energy savings</i>			GWh/y
	<i>Renewable energy production</i>			GWh/y
	<i>Avoided CO₂ emissions</i>			tCO ₂ eq/y
	<i>Other (social, climate) impacts</i>	e.g. improved living/working conditions of citizens, reduced pollution, adaptation measures, etc.		
Replication and/or up-scaling triggered since investment concept validation	<input type="checkbox"/>	No replication and/or up-scaling effects triggered since the validation of the investment concept		
	<input type="checkbox"/>	Investment concept has triggered replication and/or upscaling effects since its validation		
	<input type="checkbox"/>	Replication and/or up-scaling effects have not been triggered yet, but are expected in the near future.		

	Please briefly describe the (expected) replication and/or up-scaling effects triggered by the investment concept. – (max 500 characters, including spaces)								
Deviation from investment concept	In case of any deviating information and/or figures from the validated investment concept, please briefly outline them and state the reasons. – (max 500 characters, including spaces)								
Challenges and/or barriers for investment concept implementation	<p>Please select the main challenges and/or barriers faced in the implementation of the investment concept, if any (note: more than one answer is possible).</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Difficulty in accessing funding sources</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Lack of (technical/financial) expertise/capacity of the public authority staff</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Slow and bureaucratic processes within the funding sources, municipality/ local authority or grouping, etc.</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Others</td> </tr> </table> <p>For others, please specify</p>	<input type="checkbox"/>	Difficulty in accessing funding sources	<input type="checkbox"/>	Lack of (technical/financial) expertise/capacity of the public authority staff	<input type="checkbox"/>	Slow and bureaucratic processes within the funding sources, municipality/ local authority or grouping, etc.	<input type="checkbox"/>	Others
<input type="checkbox"/>	Difficulty in accessing funding sources								
<input type="checkbox"/>	Lack of (technical/financial) expertise/capacity of the public authority staff								
<input type="checkbox"/>	Slow and bureaucratic processes within the funding sources, municipality/ local authority or grouping, etc.								
<input type="checkbox"/>	Others								

B. EUCF support											
Capacity building	<p>Could capacities (e.g. financial expertise in the field of sustainable energy) of the municipality/local authority's staff be built during the EUCF journey?</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> </tr> </table>	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No						
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No								
Further investments planned	<p>Are further investments in sustainable energy considered/planned by the municipality/local authority or grouping?</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> </tr> </table>	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No						
<input type="checkbox"/>	Yes	<input type="checkbox"/>	No								
Capacity building services provided	<p>How helpful do you consider the capacity building services provided by the EUCF during the EUCF journey so far?</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>1 - Very helpful</td> <td>2 - Helpful</td> <td>3 - Moderate</td> <td>4 - Partly helpful</td> <td>5 - Not helpful</td> </tr> </table>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 - Very helpful	2 - Helpful	3 - Moderate	4 - Partly helpful	5 - Not helpful
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
1 - Very helpful	2 - Helpful	3 - Moderate	4 - Partly helpful	5 - Not helpful							
Further capacity building services	<p>Please indicate (further) EUCF capacity building services required to support the investment concept implementation, if any (note: more than one answer is possible).</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td>(Further) Opportunities for exchange/networking with other EUCF beneficiaries</td> </tr> <tr> <td><input type="checkbox"/></td> <td>(Further) Opportunities for exchange/networking with financial actors</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Workshops/webinars on relevant topics for IC implementation</td> </tr> </table>	<input type="checkbox"/>	(Further) Opportunities for exchange/networking with other EUCF beneficiaries	<input type="checkbox"/>	(Further) Opportunities for exchange/networking with financial actors	<input type="checkbox"/>	Workshops/webinars on relevant topics for IC implementation				
<input type="checkbox"/>	(Further) Opportunities for exchange/networking with other EUCF beneficiaries										
<input type="checkbox"/>	(Further) Opportunities for exchange/networking with financial actors										
<input type="checkbox"/>	Workshops/webinars on relevant topics for IC implementation										

	<input type="checkbox"/> Additional support from country experts	
	<input type="checkbox"/> Others	
	For others, please specify	
Lessons learned/Key takeaways	Please briefly describe the main learnings acquired during the investment concept implementation. – <i>(max 500 characters, including spaces)</i>	
Feedback to the EUCF	If applicable, please provide any feedback, suggestions for improvement, etc. for the EUCF that came up during the investment concept implementation. – <i>(max 500 characters, including spaces)</i>	

