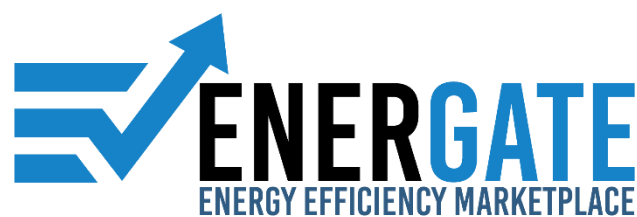




Deliverable D3.4

Guidelines for Platform Use

September 2025



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List of Abbreviations

CAPEX	Capital Expenditure
EE	Energy Efficiency
EPC	Energy Performance Certificate
ESCO	Energy Service Company
EU	European Union
FAQ	Frequently Asked Questions
HVAC	Heating, Ventilation and Air Conditioning
ICT	Information and Communication Technology
IRR	Internal Rate of Return
MCDM	Multi-Criteria Decision Making
NPV	Net Present Value
O&M	Operations and Maintenance
PDF	Portable Document Format
PPA	Power Purchase Agreement
TOPSIS	Technique for Order of Preference by Similarity to Ideal Solution

Executive Summary

The ENERGATE Energy Efficiency Marketplace, is a web platform designed to facilitate energy efficiency investments. This report aims to provide a detailed description of the platform's functionalities, as well as the guidelines to navigate and use it.

First, the registration process is presented for each of the four available user types, namely, Building Owners, Public Bodies, Implementors and Financiers. Following that, each of the functionalities offered per user is explained step-by-step, including the available buttons, input fields needed to be filled and services provided.

The Building Owner user type has the ability to insert and manage buildings into the platform, estimate potential energy consumption and CO₂ emission savings and get offers from Implementors, interested in implementing energy efficiency projects for the buildings. The Public Body profile has access to the same functionalities, with some differences in certain input fields, which reflect the legal requirements of the public sector in terms of public procurement and tendering processes.

The Implementors can be matched with private buildings and provide them with offers related to the services that will be implemented. If these offers are accepted, they can then proceed with preparing a finalised offer and find finance if needed by the end client. Public buildings are also available to view, but a direct match cannot be made through the platform if the project exceeds the tender threshold due restrictions related to procurement regulation. The Implementors can also add their own building for which finance is needed (by inserting a final offer directly) so that it can be matched with Financiers. Finally, the Implementors are able to aggregate buildings and create a new and bigger project, that is more likely to attract Financiers.

The Financiers are able to view both public and private projects prepared by the Implementors, and they can decide if they are interested to finance them or not based on a set of specific KPIs (financial, geography, technology amongst others). These projects include individual buildings or a cluster with aggregated buildings, with all the necessary financial indicators that will help Financiers decide if they want to proceed with financing them. The Financiers also have a plethora of filters available to enable, as well as a prioritisation service, to ensure that they find suitable projects to finance.

The Deliver Stage provides an on-request evaluation of the technical, financial, comfort, and environmental performance of renovation projects through an interactive dashboard. By integrating advanced analytics and results from various EU initiatives, it offers users a single, cohesive view of post-renovation impacts. This service strengthens the ENERGATE Marketplace by supporting informed decisions, easier financing, and transparent reporting for all stakeholders.

1. Introduction

The purpose of this deliverable is to provide an overview of the platform along with the services and use cases it offers, and to also provide the necessary guidelines to understand and efficiently use the platform. The deliverable is structured in a manner that enables the navigation of the platform step-by-step, and the use of the available services. The structure is the following:

- **Homepage & Registration:** In chapter 2 the welcome home page is firstly presented, including a brief description of the platform's objective. Following that, in chapter 3 the registration process is explained in detail for each user type.
- **Building Owner:** Chapter 4 details the functionalities offered to Building Owner type users. The subsections are organised in such a manner that allows the reader to follow along with the platform.
- **Public Body:** Similarly, chapter 5 describes the activities enabled for Public Bodies, highlighting the differences with Building Owners.
- **Implementors:** In chapter 6, the Implementor activities are described, focusing on the connection and interaction with other user types.
- **Financiers:** Chapter 7 describes the functionalities offered to Financiers and how they can find suitable projects through the platform.
- **Deliver Stage:** Chapter 8 details the functionalities and services for post-renovation evaluation, targeted to Implementors and Financiers, leveraging synergies with other EU projects and initiatives.

The guidelines detailed in this deliverable will also be made available in the ENERGATE platform to provide interested users with all the information they need to explore and fully utilise the platform. Additionally, explanatory videos showcasing the platform's capabilities will be accompanied by the guidelines, to further assist users in using the platform.

1.1. The ENERGATE platform in a nutshell

The ENERGATE Energy Efficiency (EE) Marketplace (hereinafter referred to as ENERGATE platform) is an ICT (Information and Communication Technology) platform that aims to facilitate communication and financial deal closure between market actors involved in energy efficiency projects for buildings. The platform enables the effective collection of project related information, financial matchmaking and aggregation of projects, while supporting investments in energy efficiency by providing services that facilitate the financing of building renovations. More information about the ENERGATE project can also be found in the official website at: <https://energate-project.eu/>, while the ENERGATE platform is hosted at: <https://energate.epu.ntua.gr>.

ENERGATE User Roles and Use Cases

The ENERGATE platform currently hosts four different user types, each having a distinct role in the platform, that are able to interact with each other through the platform's services and functionalities, with the ultimate goal of facilitating energy efficiency investments.

The following table presents the different user types of the ENERGATE platform along with their respective roles.

Table 1: ENERGATE User Roles

User Roles	Description
Building Owner	Building Owners (including various stakeholders such as asset or property managers, building administrators or real estate developers) will be able to upload their buildings on the platform, and showcase their projects in a standardised manner, thus ensuring transparency and efficiency in the dialogue with Implementors and investors.
Implementor	Implementors (stakeholders implementing energy efficiency projects in buildings i.e. ESCOs, project developers, engineering companies, architect & design companies, installers, maintenance companies, real estate companies with technical teams in-house) will be able to place their energy efficiency and renewable projects on the platform to access finance and also find possible clients, as users they interact with both Financiers and Building Owners and exchange information about projects, best practices and funding schemes to help them find the best solution for implementing specific energy efficiency projects.
Financier	Financiers will find in the ENERGATE marketplace the go-to source of pipeline of energy efficiency projects in the built environment in EU countries. Reliable, aggregated, and accurate information on future investment opportunities should facilitate the deployment of capital and monitoring its development.
Public Body	Public Bodies (mainly municipalities) and any entity subject to public procurement procedures that aim to renovate one or multiple buildings can use the ENERGATE platform to insert data relevant to buildings, explore available EU funding mechanisms that might be suitable for their energy efficiency project, inform Implementors and Financiers in the platform about the project, and aggregate projects to create project bundles.

The following diagram shows the use cases that are currently implemented by the ENERGATE platform.

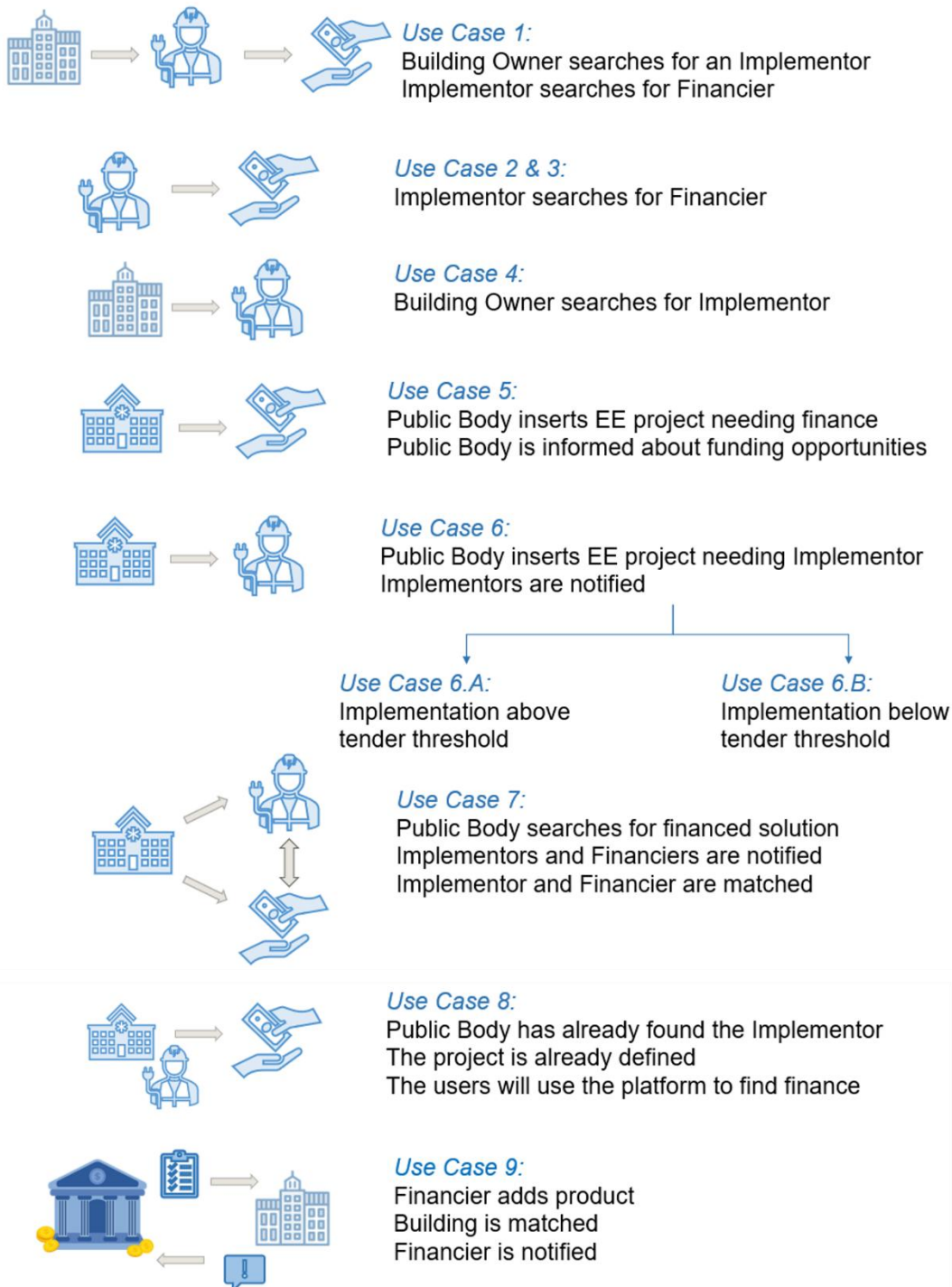


Figure 1: ENERGate Use Cases

Additionally, the use cases are analysed in the table below, including who and what is involved in each.

Table 2: ENERGATE Use Cases

Use Case ID	Description
UC1	A Building Owner searches for technical and financial support to execute a renovation project (thus, the Building Owner searches for both an Implementor and a Financier).
UC2 & 3	An Implementor (either technical expert – UC2 or real estate company with a technical team in – house – UC3) searches for financial support to renovate a building it manages or that of an external client (thus, the Implementor searches for a Financier and does not interact with Building Owners on the platform).
UC4	A Building Owner searches for technical support, but not for finance through the platform (thus, the Building Owner searches for an Implementor and the Financiers in the platform are not involved). This use case also covers the case where the Implementor that is matched with the Building Owner is an ESCo that already has an established collaboration with a financing body (thus the Implementor will find finance for the project without interacting with the Financiers on the platform).
UC5	A Public Body explores funding options through ENERGATE's repository of funding sources.
UC6	A Public Body that needs technical support makes the information about an energy efficiency project available to Implementors, in compliance with public procurement processes.
UC7	A Public Body that needs technical and financial support makes the information about an energy efficiency project available to Implementors and Financiers. Interested Implementors are matched with relevant Financiers to prepare a funded solution.
UC8	A Public Body searches for financial support to execute a project (thus, the Public Body searches for a Financier and does not interact with an Implementor in the platform).
UC9	A Financier can add specific financing tools/products and receive notifications when a Building Owner is interested (mainly valid for the banking sector). Financiers can also add financing tools for public buildings.

More information about the ENERGATE platform's user roles, use cases and user requirements is available in the relevant technical [report \(Report on Specifications for Project Entries, User Profiles, Use Cases and User Ranks\)](#).

2. Navigating the ENERGATE homepage

The homepage welcomes visitors with a visually appealing layout designed to capture attention and provide immediate insight into the website's purpose. The user can navigate the home page without registering in the platform as a user.

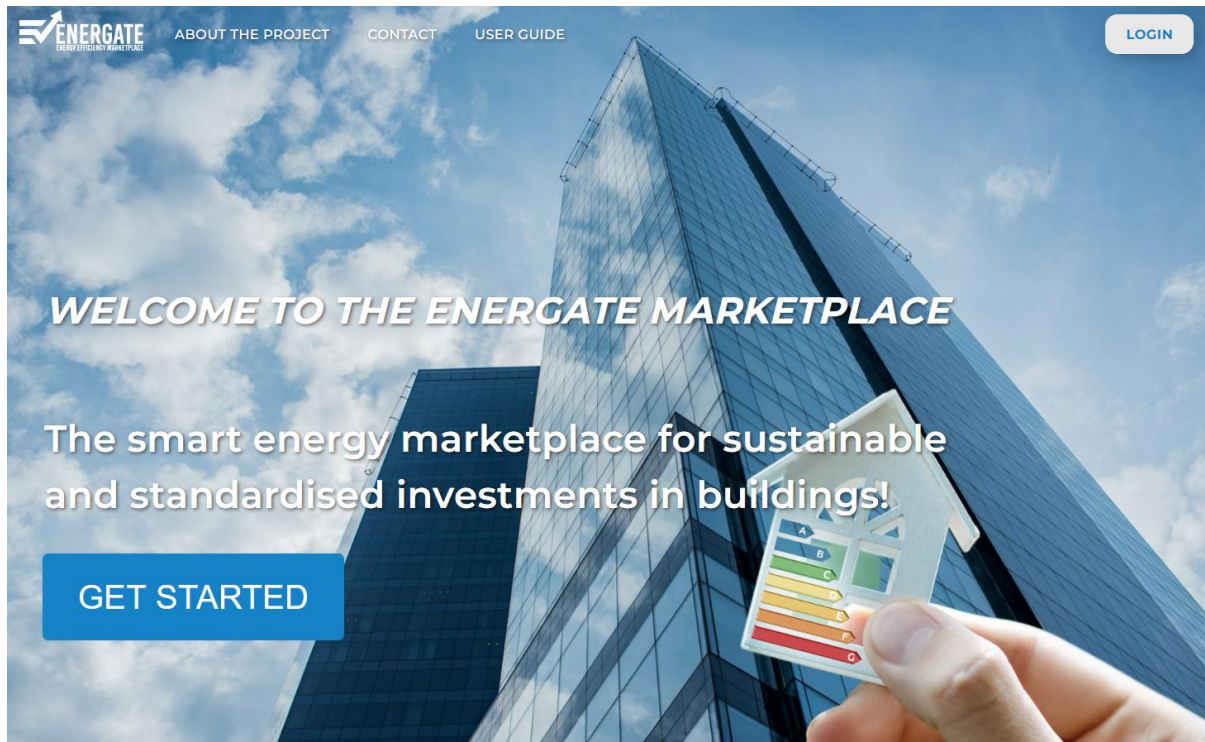
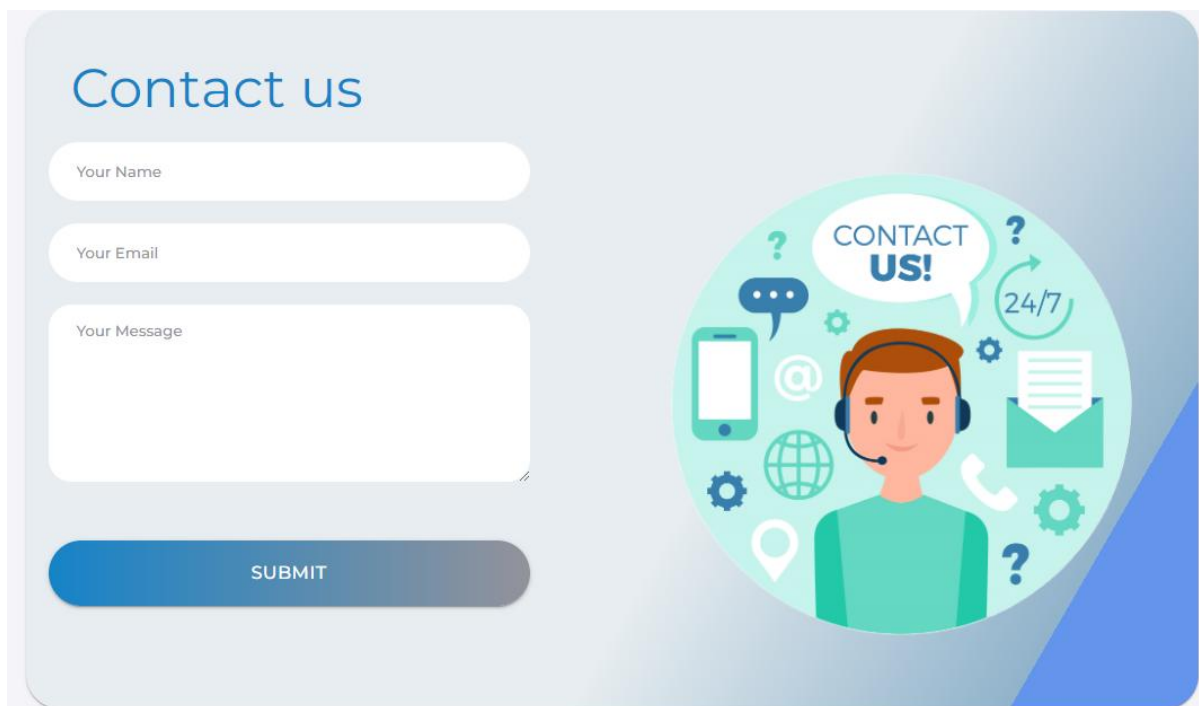


Figure 2: ENERGATE Homepage

At the top, a clean and intuitive navigation bar offers easy access to key sections of the platform, ensuring smooth exploration. The navigation bar consists of five different options:

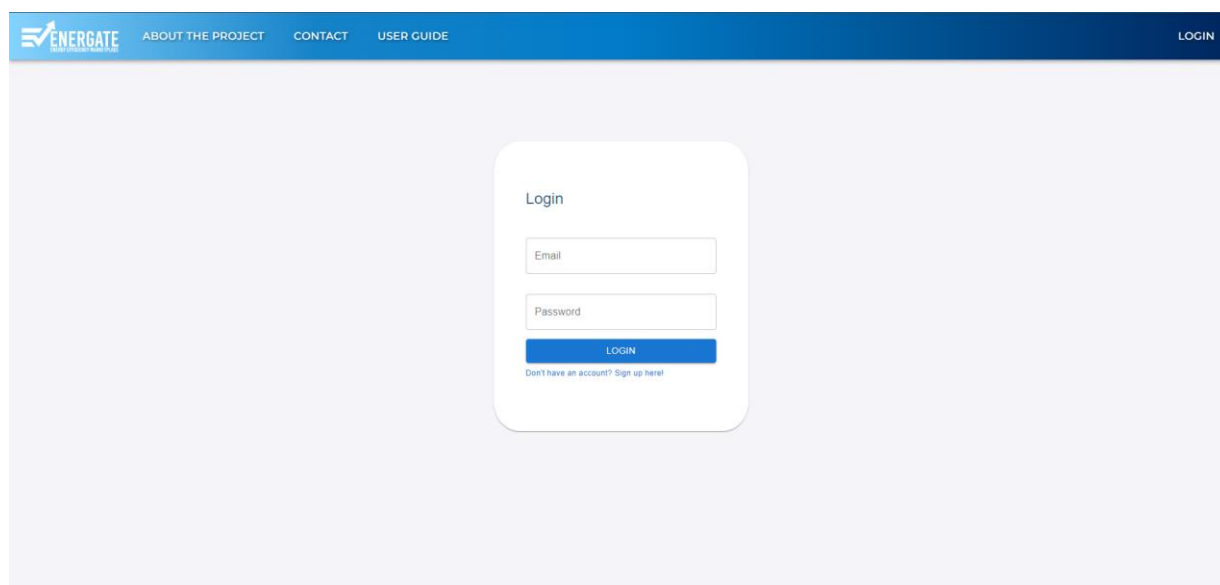
- **ENERGATE logo:** By clicking on the ENERGATE logo, the user can navigate to the homepage of the ENERGATE platform.
- **About the project:** By clicking the “About the project” option the user is re-directed to the About page of the ENERGATE project (<https://energate-project.eu/about>) that provides information related to the project objectives and expected impact.
- **Contact:** By clicking the contact option, the user can access the contact form, through which they can send an email to report problems or request additional information. The ENERGATE team will respond as soon as possible in order to resolve any problems and provide clarifications/additional information.



The contact form is titled "Contact us" in a large blue font. It features three input fields: "Your Name", "Your Email", and "Your Message". Below these fields is a blue "SUBMIT" button. To the right of the form is a circular illustration of a customer service agent wearing a headset, surrounded by various icons including a smartphone, a globe, a speech bubble with "CONTACT US!", a "24/7" badge, and question marks.

Figure 3: Contact us form

- **User Guide:** The user guide option contains two sub-options:
 - **Guidelines:** On this page the user, depending on their status, i.e. whether they are a Building Owner, an Implementor, a Financier or a Public Body, can explore the ENERGATE platform functionalities and download the complete manual to facilitate navigation. There is also a link that redirects the user to a YouTube video demonstrating how the platform works.
 - **FAQ:** On this page, the user can navigate through different frequently asked questions in order to troubleshoot any minor issues.
- **Login:** By clicking the login option, the user is re-directed to the login page where they can either register as a new user of the platform or login to an existing account.



The login page has a dark blue header with the ENERGATE logo and navigation links: "ABOUT THE PROJECT", "CONTACT", "USER GUIDE", and "LOGIN". The main content area is light blue and features a white login box. Inside the box, there is a "Login" heading, an "Email" input field, a "Password" input field, and a blue "LOGIN" button. Below the button, a link reads "Don't have an account? Sign up here!".

Figure 4: Login Page

Beneath the navigation bar, there is the **“GET STARTED”** button which redirects the user to the login page, if the user has not logged in yet.

By scrolling down, the user can access basic information about the ENERGATE project. More specifically, by clicking the **“Fill Our Survey!”** button the user is being redirected to a short feedback form. The survey helps the ENERGATE team to understand the user’s experience with the platform making her better for all the users. Continuing, there is the **“About Us”** section and after that the **“What We Offer”** section that features interactive flipping cards, each representing a unique user type. This section also describes the benefits that the platform offers to each user type.

Before you go, help us improve!

Fill Our Survey!

Figure 5: “Fill Our Survey” section

What we offer

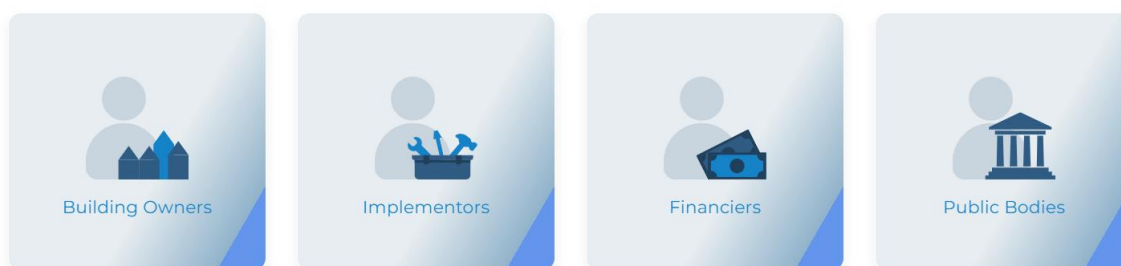


Figure 6: “What we offer” section

Supporters



Figure 7: “Supporters” section

Following the **“What we offer”** section, the **“Supporters”** section displays the organizations and entities that have provided formal **Letters of Support** for the project. These institutions recognise the value and goals of the platform and contribute to its credibility and reach. Moving on, the user can see the ENERGATE partners. By clicking on their logos, the user is redirected to each partner’s website.

12 Partners 6 Countries



Figure 8: "ENERGATE Partners" section

At the end of the home page, there is a footer, where the user can find:

- **Social Media Links:** Any website visitor can stay connected with the project through ENERGATE's social media channels, on X, LinkedIn and on YouTube.
- **Privacy Policy:** ENERGATE's privacy policy describes how the platform collects, uses, discloses, and manages a user's personal information.
- **Terms and Conditions:** The rules and guidelines that users must agree to, in order to use the ENERGATE platform, are outlined here.



Figure 9: Footer.

The user can click on either "**Privacy Policy**" or "**Terms and conditions**" and read the respective texts.

Privacy Policy

1. Introduction

The National Technical University of Athens (hereinafter, NTUA) is the coordinator of the European project: [ENERGATE](#) "Energy Efficiency Aggregation platform for Sustainable Investments" of the European Union's LIFE Programme co-funded by the European Union under project ID101076349.

The [ENERGATE Consortium](#) ("we", "us" or "our") respects the privacy of our users and makes it a priority to ensure the protection of their information. This policy ("Privacy Policy") sets forth our collection, processing, and retention practices for any information related to our ENERGATE Energy Efficiency Marketplace ("Platform") users ("you", "your" or "users") obtained and used by us in the course of providing services to our users through the Platform.

As the Platform collects personal data, it is subject to the **General Data Protection Regulation (GDPR) - Regulation (EU) 2016/679** - on the protection of natural persons with regard to the processing of personal data and on the free movement of such data.

This privacy policy discloses what information we gather and how we use it. We invite you to read these terms carefully before providing your personal data on the Platform.

This Platform respects and protects the personal data of users. As a user, you should know that your rights are guaranteed.

We have endeavoured to create a secure and reliable space and for this reason, we want to share our principles regarding your privacy:

- We never request any personal information unless it is absolutely necessary to provide the services required
- We never share personal information about our users with anybody, except to comply with the law or in case we have your express authorisation.
- We shall never use your personal data for a purpose other than that stated in this privacy policy.

It should be noted that this Privacy Policy may vary depending on legislative or selfregulatory requirements, so users are advised to review it periodically.

Personal data controller:

Decision Support Systems Laboratory, National Technical University of Athens

2. Data Collection and Process

2.1 What information does the platform collect?

If you register as a user for this Platform, you will be asked for personal data, such as your name and email address. You provide this data so that your

[CLOSE](#)

Figure 10: Privacy Policy

User Terms and Conditions

1. General Terms

The ENERGATE Energy Efficiency Marketplace (**ENERGATE marketplace** or **Platform**) is delivered by the LIFE Programm project [ENERGATE "Energy Efficiency Aggregation platform for Sustainable Investments"](#), co-funded by the European Union under project ID101076349 and coordinated by [National Technical University of Athens](#). Use of this Platform constitutes agreement with the following terms and conditions.

You agree that by accessing the ENERGATE marketplace, you have read, understood, and agree to be bound by all the terms and conditions described below. These terms apply to the entire Platform and any email or type of communication between you and the Platform. If you do not agree with all the terms and conditions, you are obliged to discontinue use of the Platform.

The services provided by the ENERGATE marketplace are intended for users who are at least 18 years old.

2. The ENERGATE Marketplace

The ENERGATE project aims to facilitate communication between market actors and upstream energy efficiency in buildings, through an ICT enabled platform, the ENERGATE marketplace. The Platform pursues to enable effective collection of project related information, business matchmaking and aggregation of projects while supporting energy efficiency investment by providing services for sustainable financing of building renovation.

We help you find the appropriate implementation and financing partners to execute an energy efficiency project (matchmaking service), while offering support in various decision-making processes. We do not represent that the matchmaking service provided by the platform is a contract or legal agreement of the parties involved. In addition, since the platform is in an experimental phase there may be errors in the automatic mechanisms and features that it provides (aggregation, matchmaking, user performance) and we are not responsible for them.

The outputs provided when using the Platform are not intended for distribution to or use by any person or entity in any jurisdiction or country where such distribution or use would be contrary to law or regulation or which would subject us to any registration requirement within such jurisdiction or country. Currently, the services of the Platform are provided for EU member states. Accordingly, the individuals who choose to access the Platform from other locations do so on their own initiative and are solely responsible for compliance with local laws, if and to the extent local laws are applicable.

Although the platform is in an experimental phase (i.e. it is developed for an EU-funded project) there are efforts to be compliant with the Web Accessibility Directive and the European Accessibility Act.

3. User Representation and Registration

CLOSE

Figure 11: Terms and Conditions

3. User registration

User registration allows individuals to create an account in the platform and gain access to personalised features and content. In order to do this, the user can follow the steps below:

1. Navigate to the ENERGATE homepage.
2. Locate the **"Login"** at the top right corner of the page.

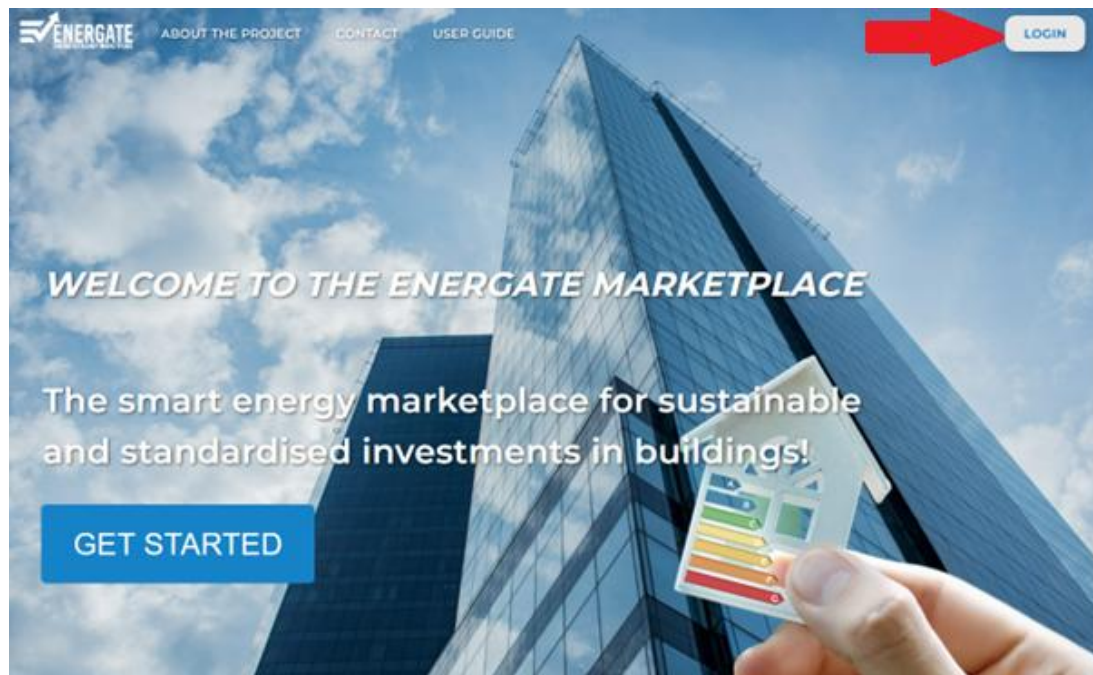


Figure 12: Selecting the login option

3. Click on the **"Don't have an account? Sign up!"** button to initiate the registration process.

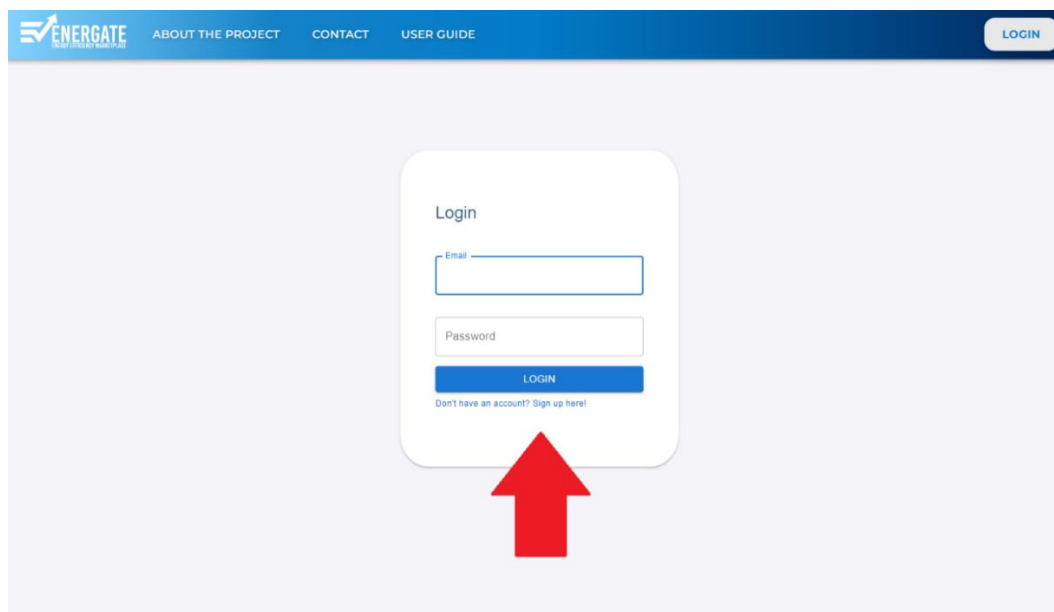


Figure 13: "Don't have an account? Sign up!" option

4. The user will then be redirected to the registration page.

Access to the ENERGate platform is protected by email and password credentials. If the user is not logged in, access to the platform is limited. Thus, the first time that the platform is used, registration is required.

Once the user logs in to the platform using their credentials, a new option, called "**My Dashboard**", appears at the top of the page in the App bar, through which the user can be redirected to the dashboard corresponding to their account type.



Figure 14: My Dashboard option

3.1. Selecting an ENERGate profile type

Once the user is redirected to the registration page, they have to select a profile between four different options:

- Building Owner
- Implementor
- Financier
- Public Body

Depending on the choice of profile, different details are requested to be filled in by the user.

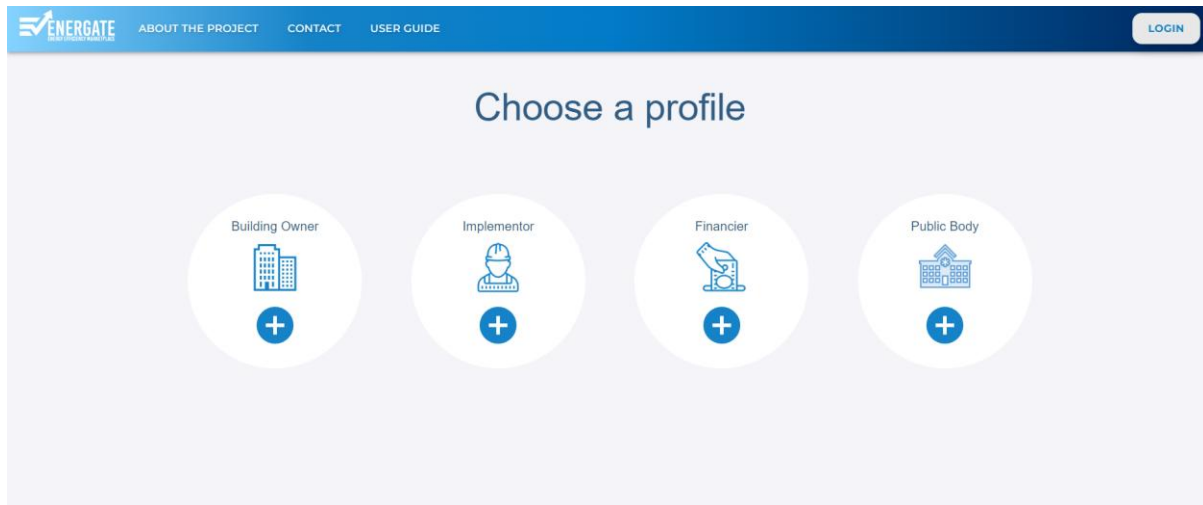


Figure 15: Profile selection

3.1.1. Building Owner Profile

If a user chooses to create a Building Owner profile, additional information is needed to create an account. This includes whether the user is looking for an Implementor or for financing sustainable energy interventions in buildings or both, and, if they are interested in complying with the EU Taxonomy guidelines and what type of projects they are interested in (EU taxonomy compliant or not).

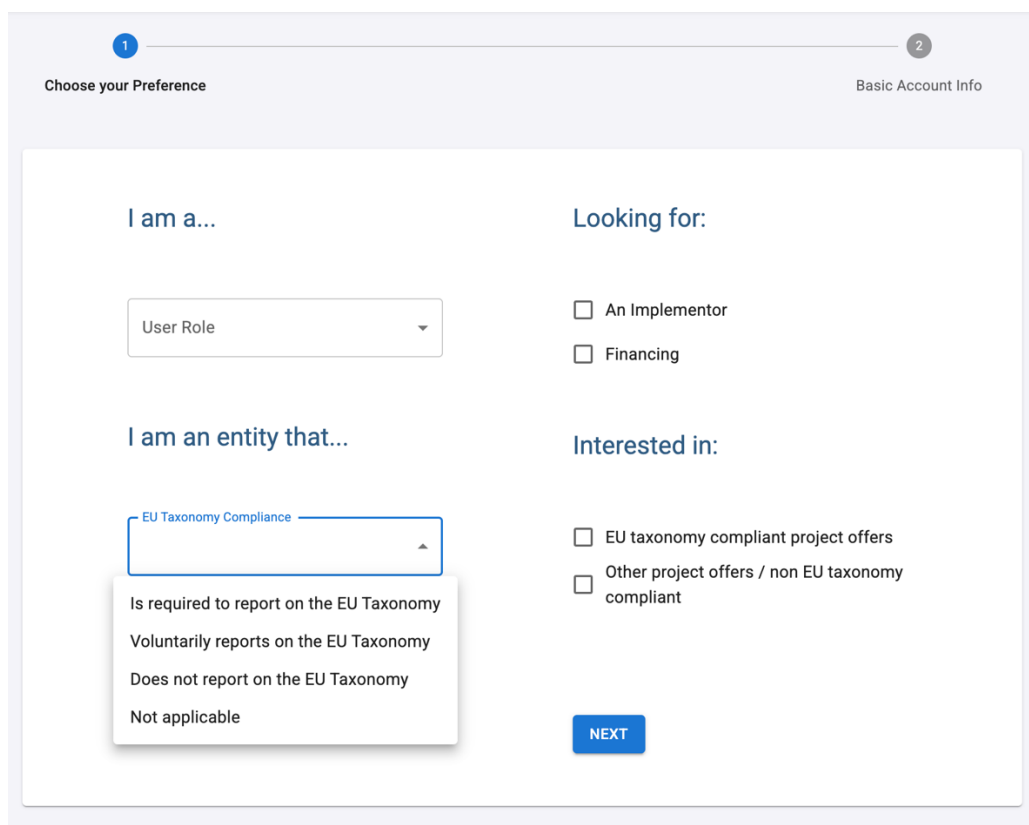


Figure 16: Building Owner user role, preferences selection

After that users need to fill in some basic account information that are being described in chapter 3.2 and then they can create their account.

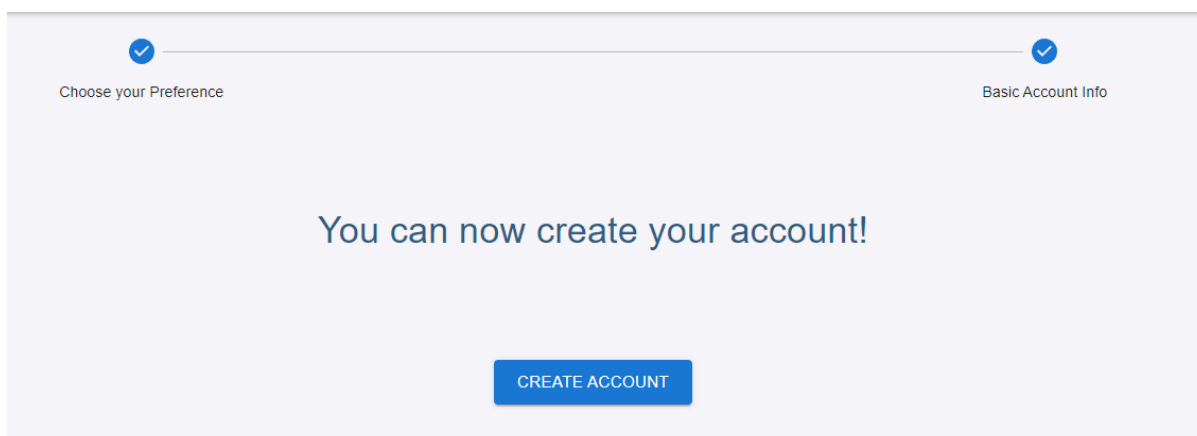


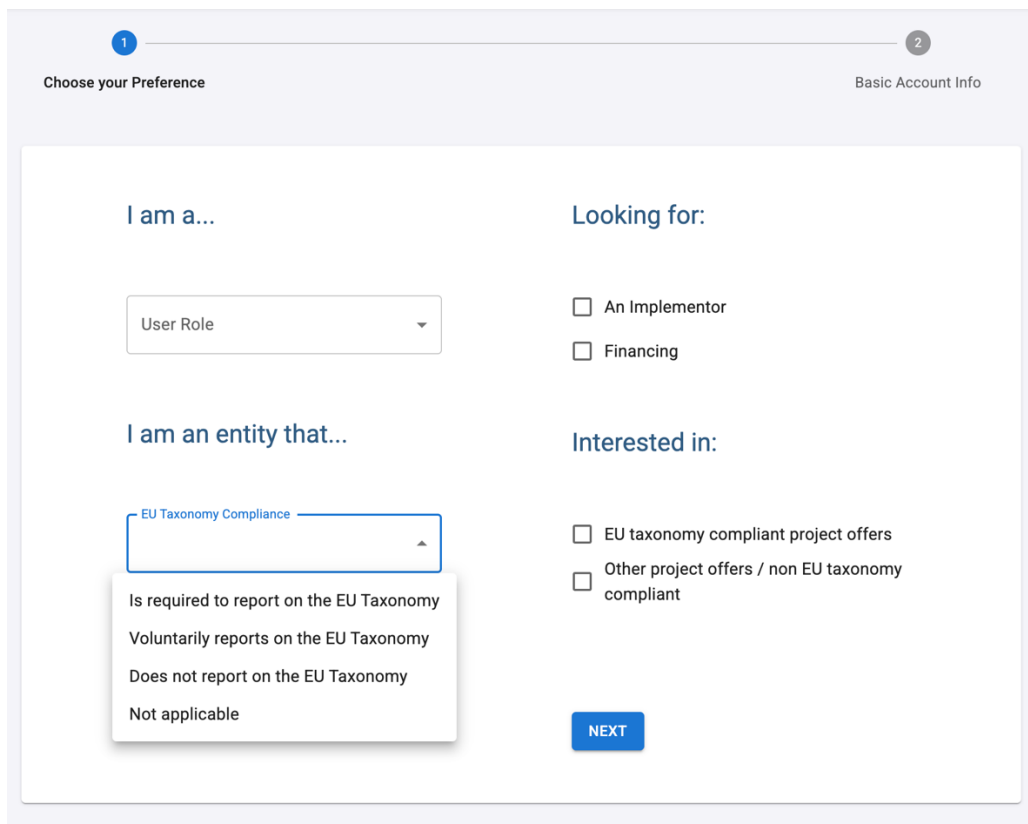
Figure 17: Account creation

After creating a user profile, the user is being redirected to the login page (Figure 13) in order to sign in and access the ENERGATE features corresponding to the user type selected.

3.1.2. Public Body Profile

If a user chooses to create a Public Body profile, the user needs to specify whether they are looking for Implementors or for financing sustainable energy interventions in buildings and

better understanding of funding programmes and initiatives and what type of projects they are interested in.



The screenshot shows a two-step process. Step 1, 'Choose your Preference', is active. It contains four sections: 'I am a...' with a 'User Role' dropdown; 'I am an entity that...' with an 'EU Taxonomy Compliance' dropdown showing options: 'Is required to report on the EU Taxonomy', 'Voluntarily reports on the EU Taxonomy', 'Does not report on the EU Taxonomy', and 'Not applicable'; 'Looking for:' with checkboxes for 'An Implementor' and 'Financing'; and 'Interested in:' with checkboxes for 'EU taxonomy compliant project offers' and 'Other project offers / non EU taxonomy compliant'. A 'NEXT' button is at the bottom right. Step 2, 'Basic Account Info', is visible in the background.

Figure 18: Public Body preferences selection

After that users need to fill in some basic account information that are being described in chapter 3.2 and then they can create their account.

3.1.3. Implementor Profile

When choosing an Implementor profile, besides the basic account information described in chapter 3.2, the user also needs to fill in their user role, whether they want to implement projects (to be matched with buildings in the ENERGate platform) or both implement and finance projects as well as whether they understand and are familiar with the EU Taxonomy guidelines and eventually can successfully and reliably execute their application to building retrofitting projects.

1

2

3

Choose your Preference
Basic Account Info
Technical Info

Are you a...?

User Role

Looking to:

☐ Finance Projects
☐ Execute Projects

I am an entity that...

EU Taxonomy Compliance

Provides EU Taxonomy compliant-related services
Does not provide EU Taxonomy compliant-related service
Not applicable

NEXT

Figure 19: Implementor preferences selection

After that users need to fill in some basic account information that are being described in chapter 3.2.

For the final step, it is necessary for the user to fill in some technical fields in order to better identify the opportunities they are interested in exploring. The additional information provided will help the user get options that better suit their profile.

Table 3: Implementor profile information.

Technical Info	Options
Technology Covered	List of energy efficiency/renewable energy measures
Years of market experience	User-defined
Years of technical experience	User-defined
Geography Covered	From these options the user can choose more than one: ○ Greece ○ Italy ○ Spain ○ Latvia ○ France ○ Austria ○ Hungary

✓

Choose your Preference

✓

Basic Account Info

3

Technical Info

Technology covered

Building Envelope

Insulation

☐ Thermal insulation of outer walls and thermal bridges
 ☐ Thermal insulation of walls
 ☐ Thermal insulation of floor
 ☐ Thermal insulation of roof

Windows

☐ Replacement of existing windows with EE windows
 ☐ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Doors

☐ Replacement of new doors with EE doors

Lighting

Light Replacement

☐ Replacement of existing light bulbs with inefficient light sources by new advanced bulbs of better light-technical characteristics and more efficient light sources

Years of market experience

Years of tech experience

Geography Covered

Greece

Italy

Spain

Latvia

France

Austria

Hungary

Figure 20: Implementor technical information

3.1.4. Financier Profile

If a user chooses to create a Financier profile, the user will need to specify their user role, their intent to finance energy efficiency projects and what type of projects they are interested in, including if they are interested in EU Taxonomy compliant projects, non-EU Taxonomy compliant projects or both. Subsequently, the user can complete the registration process and sign in to their account.

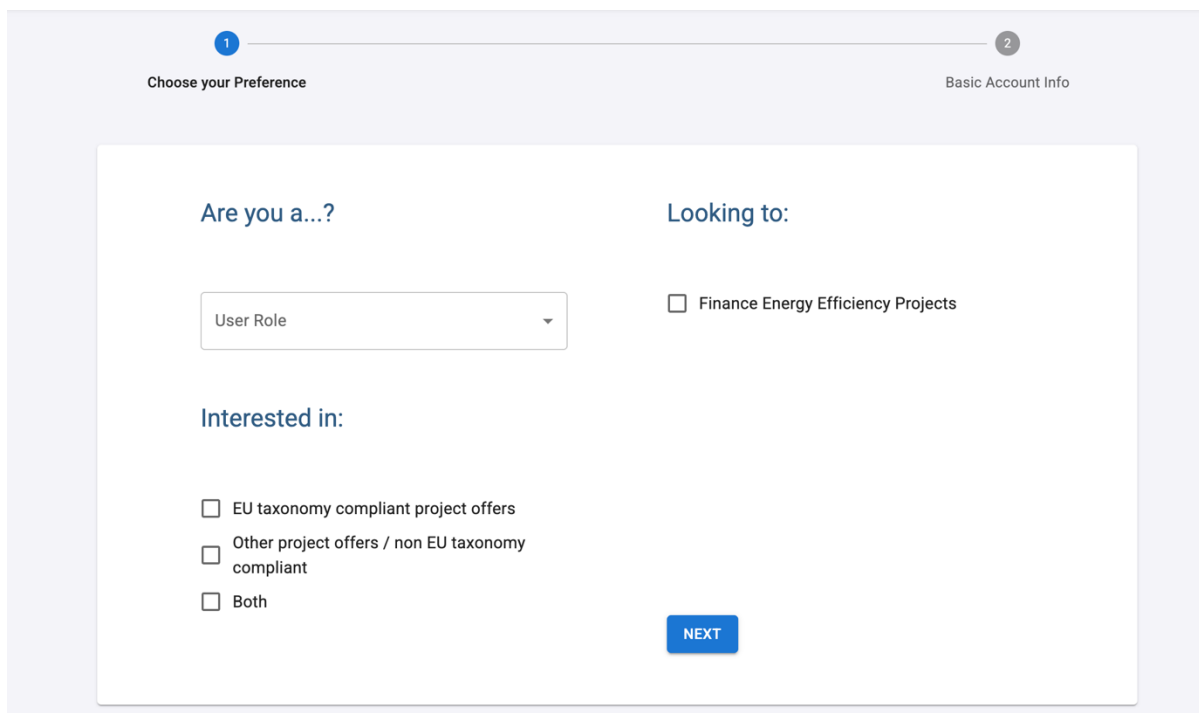


Figure 21: Financier preferences selection

After that users need to fill in some basic account information that are being described in chapter 3.2 and then they can create their account.

After creating a user profile, the user is being redirected to the login page in order to sign in and access the ENERGate features corresponding to the user type selected.

3.2. User and company information

Regardless of the account type, during the registration process the user needs to fill in some basic information, necessary for the platform's operation, such as the **company name**, **company address** and **email**, which will eventually be made available to other users during the matchmaking process. Further personal information is also required; however, such information is bound by the Privacy Policy and Terms and Conditions of the project. Overall, the information that needs to be entered can be seen in the following table:

Table 4: Basic account information.

Basic Account Information
First Name
Last Name
Username
Email address
Password
Company Name

Basic Account Information
Company Address
Country
Corporate Registration Number
VAT Number
Position in Company

The user will then be asked to provide information related to the specific user role chosen. This process can be seen in more detail in the next section. In addition, users need to accept the terms and conditions (Figure 11) of the project.

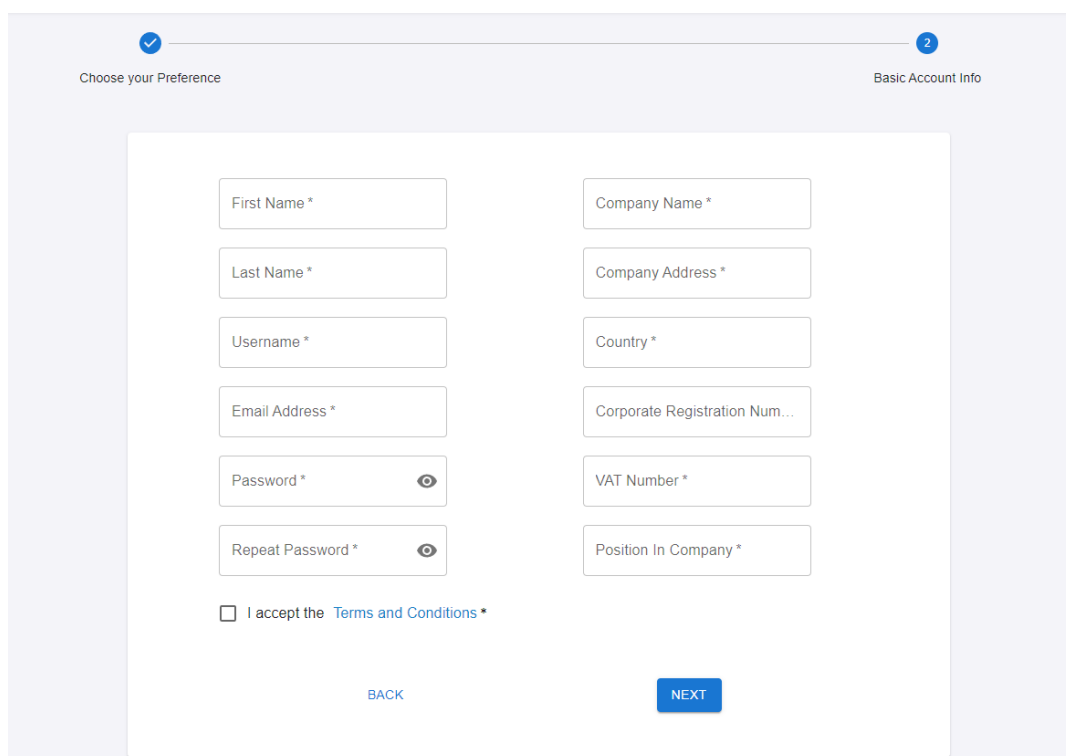


Figure 22: Basic account information

4. Building Owner

Upon logging in, Building Owners gain access to a user-friendly dashboard where they can add and manage buildings. An example of a Building Owner's dashboard is being displayed below. By clicking on the “+” button, the user can add a new building. The user also has the option to update building information, or delete it, by clicking on the three dots on a specific building.

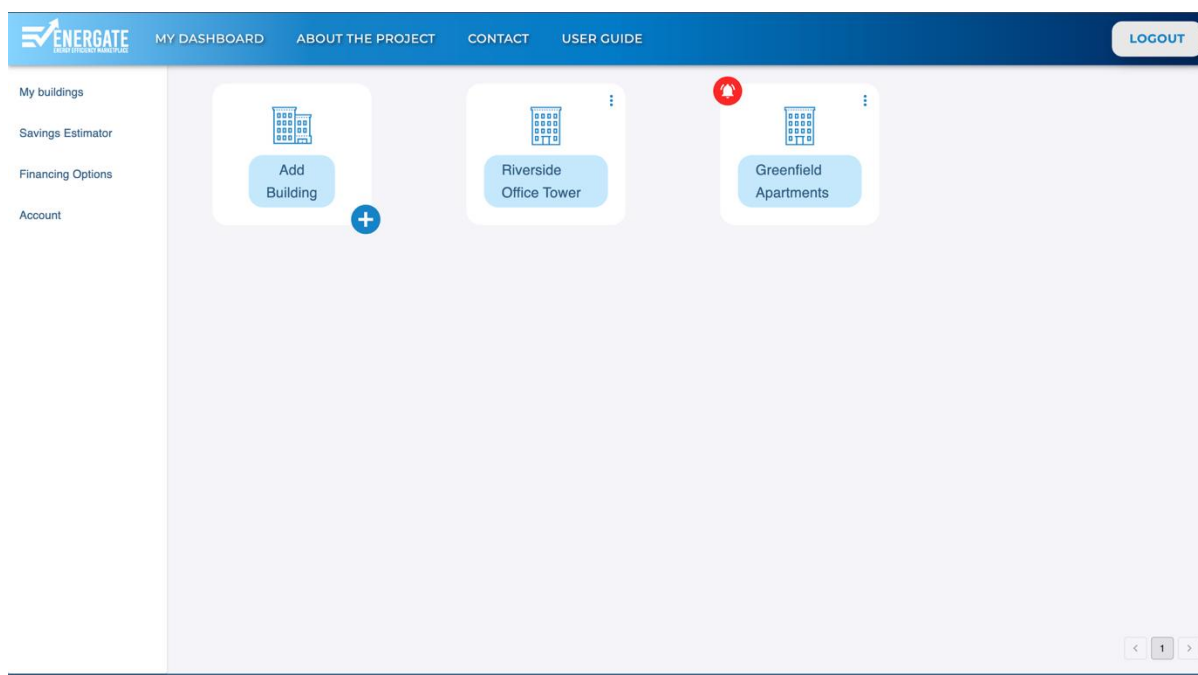


Figure 23: Building Owner dashboard

From the dashboard's left-side navigation bar, a Building Owner has three different options:

- **My buildings:** A Building Owner can add a building, review information entered for old ones and make adjustments if necessary, and check an Implementor's offer, or any other notifications related to the building.
- **Savings Estimator:** The user can access the ENERGATE Savings Estimator service and understand how different energy efficiency measures can affect their buildings to better support the decision-making process.
- **Financing options:** This section provides a list of financing options that are available to support the user's building's energy efficiency upgrades. These options are offered by Financiers such as banks and other financial institutions. Each option is designed to help Building Owners cover the costs of various energy-saving improvements.
- **Account:** The user can view their account information.

4.1. Adding a building

To add a new building, the user needs to select the add icon at the bottom right of the “**Add building**” card. After that, the user will be redirected to a page with six different tabs. The user

is requested to fill in the necessary information about the building, as described throughout this section.

4.1.1. Building Details

Starting from the Building Details tab, the Building Owner fills in the building name, description, country, province/region, climate zone in which the building is located and whether the user owns or rents the building. By hovering above the field names a small description is provided, while some fields also provide placeholders on how to fill them when clicking on them.

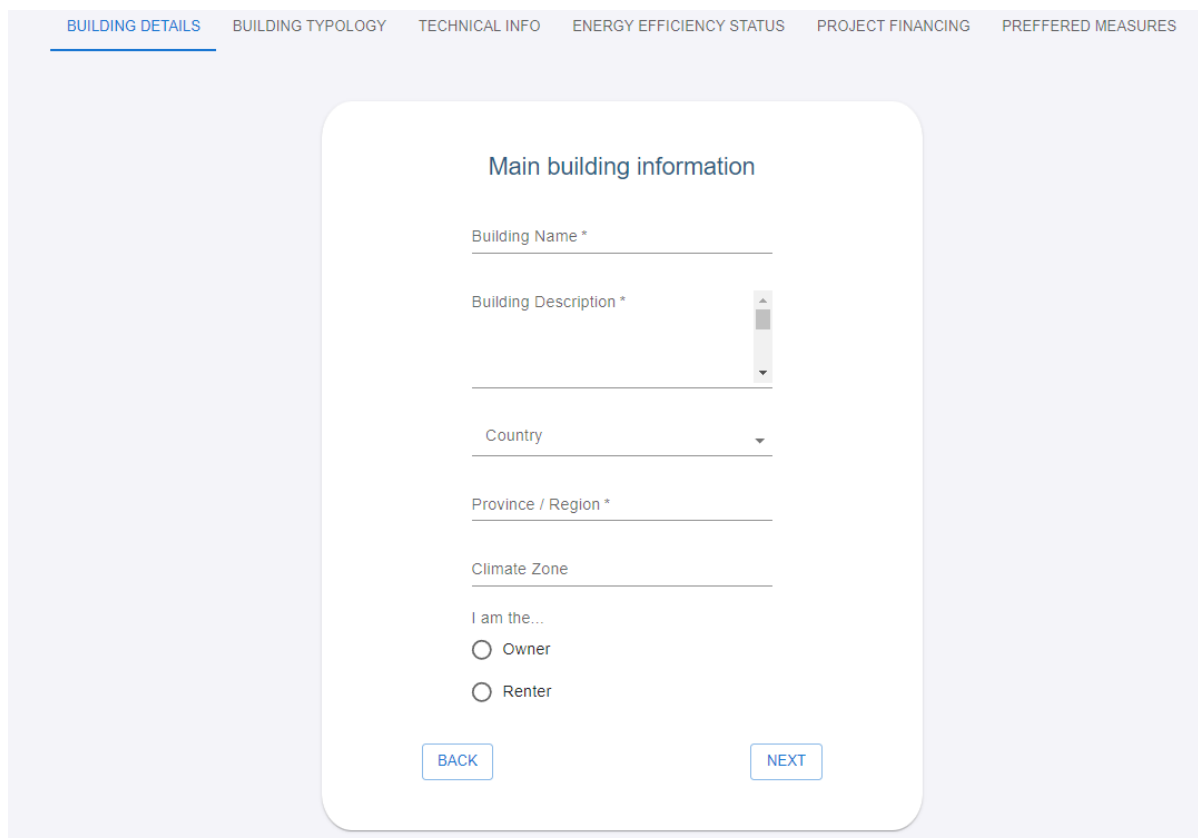


Figure 24: Building Details

4.1.2. Building Typology

Moving on to the next tab, the user needs to choose the type of building they are adding.

BUILDING DETAILS
BUILDING TYPOLOGY
TECHNICAL INFO
ENERGY EFFICIENCY STATUS
PROJECT FINANCING
PREFERRED MEASURES

Building typology

Building Type *

Commercial Building

Commercial Building
Industrial Building
Factory / Manufacturing
Office Space
Residential
Shared Space
Accommodation / Hotel
Spa Resort
Education Facility
Healthcare Facility
Sport Facility
Other

BACK

NEXT

Figure 25: Building Typology

4.1.3. Technical Information

In the Technical Information tab, the Building Owner needs to specify if any energy efficiency interventions have already been conducted to the building and fill in for each building the year of construction and size, the number of levels, the hours of usage and occupancy levels, as well as the current Energy Performance Certificate (EPC) level, using a dropdown list. Finally, the user can upload the Energy Performance Certificate (EPC) in a PDF format.

BUILDING DETAILS
BUILDING TYPOLOGY
TECHNICAL INFO
ENERGY EFFICIENCY STATUS
PROJECT FINANCING
PREFERRED MEASURES

Technical information

Past Interventions

Building Envelope

Insulation

☐ Thermal insulation of outer walls and thermal bridges
☐ Thermal insulation of walls
☐ Thermal insulation of floor
☐ Thermal insulation of roof

Windows

☐ Replacement of existing windows with EE windows
☐ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Doors

☐ Replacement of new doors with EE doors

Lighting

Light Replacement

☐ Replacement of existing light bulbs with inefficient light sources by new advanced bulbs of better light-technical characteristics and more efficient light sources
☐ Application of manual dimmers

Control / Automation

Year of Construction *

Building Size (m²) *

Number of Levels *

Hours of Usage *

Occupancy Levels *

Current EPC Level *

Upload Energy Performance Certificate (EPC)

 Upload or drop a file right here PDF

no files uploaded yet

Figure 26: Technical Information

4.1.4. Energy Efficiency Status

Transitioning to the Energy Efficiency Status tab, the user needs to specify some additional fields. These fields include: the type of heating and cooling used in the building, as well as data concerning the energy consumption of the building, in particular, the consumption of electricity, heating and cooling.

BUILDING DETAILS
BUILDING TYPOLOGY
TECHNICAL INFO
ENERGY EFFICIENCY STATUS
PROJECT FINANCING
PREFERRED MEASURES

Current Technology

Type of Heating (Year Installed-Model) *

Type of Cooling (Year Installed-Model) *

Current Energy Bill

Electricity * Kwh

Heating * Kwh

Cooling * Kwh

BACK

NEXT

Figure 27: Energy Efficiency Status

4.1.5. Project Financing

In the Project Financing Tab, the user has to select if they want to explore funding opportunities for the renovation of the building, and if so, what kind of funding is preferred.

BUILDING DETAILS
BUILDING TYPOLOGY
TECHNICAL INFO
ENERGY EFFICIENCY STATUS
PROJECT FINANCING
PREFERRED MEASURES

Preferred Project Financing

Type of Financing

☒ No Finance Needed

☐ Financed Solution

☐ As a Service

☐ Energy Performance Contract (EPC)

☐ On-Bill

☐ Bank Loan

☐ Operating Lease

☐ Applying for subsidies

BACK NEXT

Figure 28: Project Financing

The different options provided for financing projects are explained below.

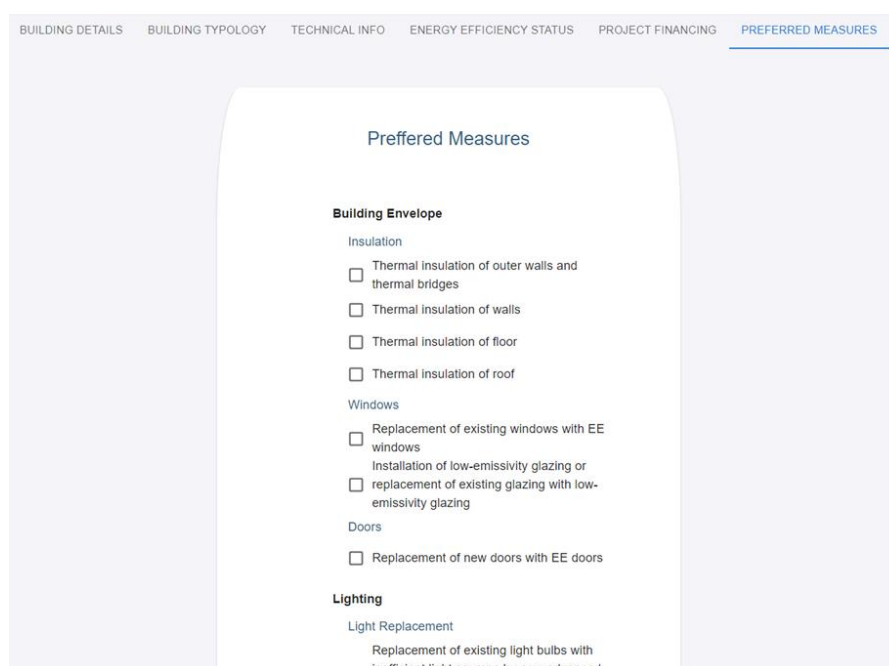
Table 5: Financing options

Financing options	Description
As a Service	Business model where services are provided on a subscription or pay-per-use basis.
Energy Performance Contract (EPC)	Agreement where an energy service company implements energy-saving measures in client facilities, recovering the investments through the savings.
On-Bill	A financing mechanism where energy efficiency upgrades or renewable energy projects are funded by a utility or energy provider, with repayment made through the customer's utility bill based on energy savings.
Bank Loan	Borrowed funds from a financial institution, typically repaid with interest over time, used for various purposes such as business investments, personal expenses, or project financing.
Operating Lease	Lease where the lessee uses an asset for a period, with the lessor retaining ownership and responsibility for maintenance.

Financing options	Description
Applying for subsidies	A subsidy in financing refers to financial assistance or support provided by the government, organisations, or institutions to help reduce the cost of goods, services, or projects. This assistance can take various forms, such as direct cash payments, tax reductions, low-interest loans, or grants, and is often aimed at encouraging certain activities, investments, or sectors that serve public or economic interests.

4.1.6. Preferred Measures

Finally, in the Preferred Measures Tab, the Building Owner can select all the energy efficiency/renewable energy measures that they are interested in implementing for the specific building.



Preferred Measures

Building Envelope

Insulation

- ☐ Thermal insulation of outer walls and thermal bridges
- ☐ Thermal insulation of walls
- ☐ Thermal insulation of floor
- ☐ Thermal insulation of roof

Windows

- ☐ Replacement of existing windows with EE windows
- ☐ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Doors

- ☐ Replacement of new doors with EE doors

Lighting

Light Replacement

Replacement of existing light bulbs with inefficient light sources by new advanced

Figure 29: Preferred Measures

By selecting the **“Add Building”** button at the end of this tab the user can finalise the addition of the building. The building is then added at the dashboard as shown in Figure 23.

4.2. Updating & deleting a building

Last but not least, the user can delete a building or update any of the building’s information, by using the top right icon of the building’s card.

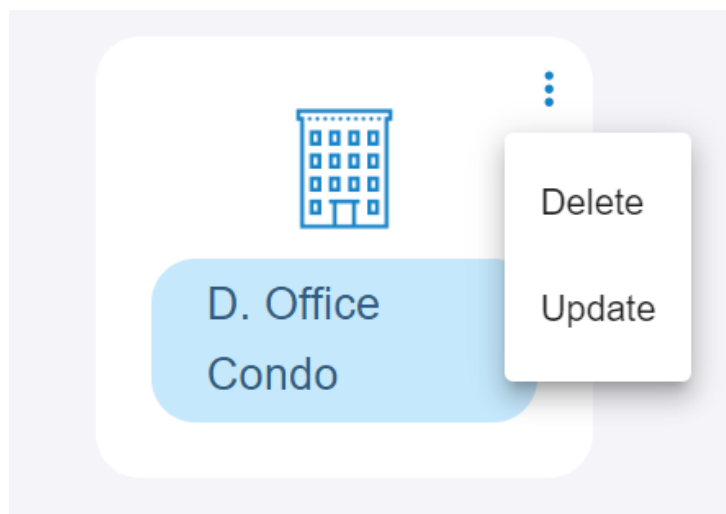


Figure 30: Delete or update a building

4.3. Savings Estimator

By clicking on **“Savings Estimator”** in the left-side navigation bar, the user is redirected to a page that contains two services, the **“Potential renovations”** service, where they can examine how different energy efficiency/renewable energy measures affect buildings, and the **“Similar buildings”** service, where they can see what energy renovation actions have already been taken along with their benefits to similar buildings to theirs. The first service enables the user to choose different measures and get the estimated energy consumption and CO₂ savings. More information regarding the service can be found in this paper¹

The user is first requested to select the building for which the service will be applied to Figure 31.

← Buildings

Select the building you want to check for renovations

D. Office Condo

D. Apartment Building

< 1 >

Figure 31: Selection of buildings in Savings Estimator service

When selecting a building the user can then choose the energy efficiency/renewable energy measures to be applied, in order to then, get the results.

¹ [ML-Based Decision Support System for Energy Efficiency Retrofits](#)

POTENTIAL RENOVATIONS

←

Potential Renovations

☐ Renovation of the building's enclosing structures

☐ Heat supply renovation

☐ Ventilation system renovation

☐ Energy efficient lighting

☐ Wood chips, biomass pellets and straw boiler house

☐ Technological equipment

☐ Solar collector system

☐ Energy sources with heat pumps

☐ Internal engineering networks

☐ Solar power

CANCEL

SUBMIT

Figure 32: Choosing energy efficiency measures for the selected building

After choosing the preferred measures, the results are presented in the right side of the page, as can be seen in Figure 33. More specifically, the user gains insight into estimated energy and CO₂ reductions that can be achieved if these energy efficiency measures/renewable energy installations are applied to the building. This can help the user select appropriate measures for their buildings based on energy saving/renewable production targets.

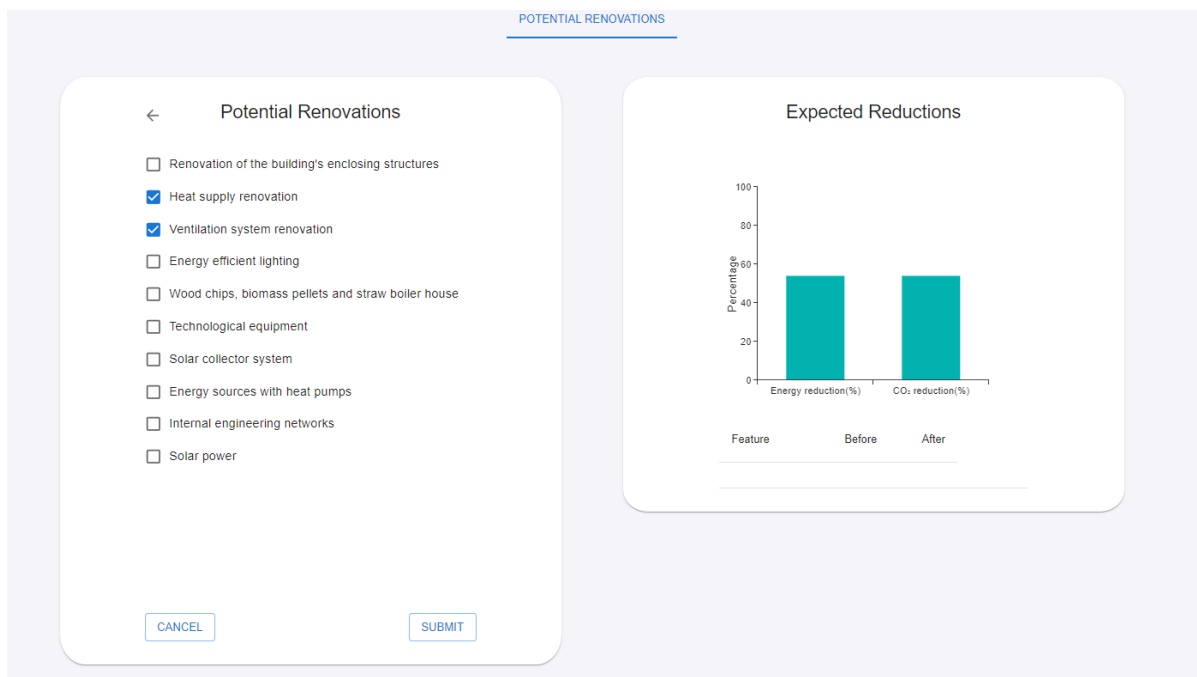


Figure 33: Savings Estimator service results.

Regarding the “Similar buildings” service, the user is first requested to select the building for which the service will be applied to.

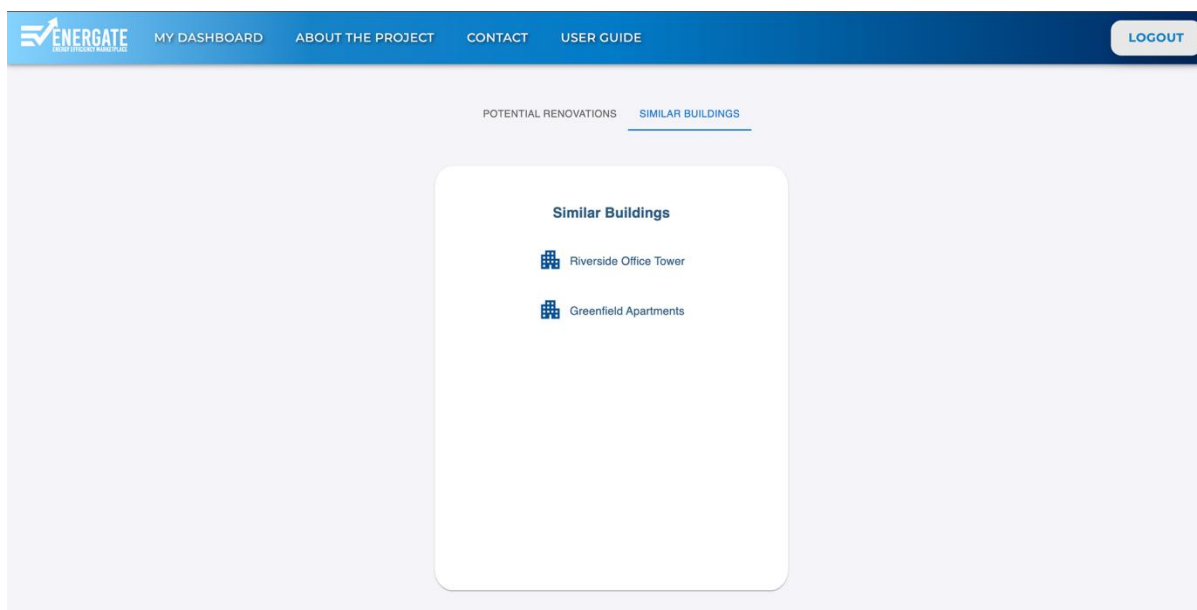


Figure 34: Similar Buildings service

After that, the users gain access to the 10 most similar buildings to the one they work on, based on shared characteristics such as location, construction year, size, and energy usage.

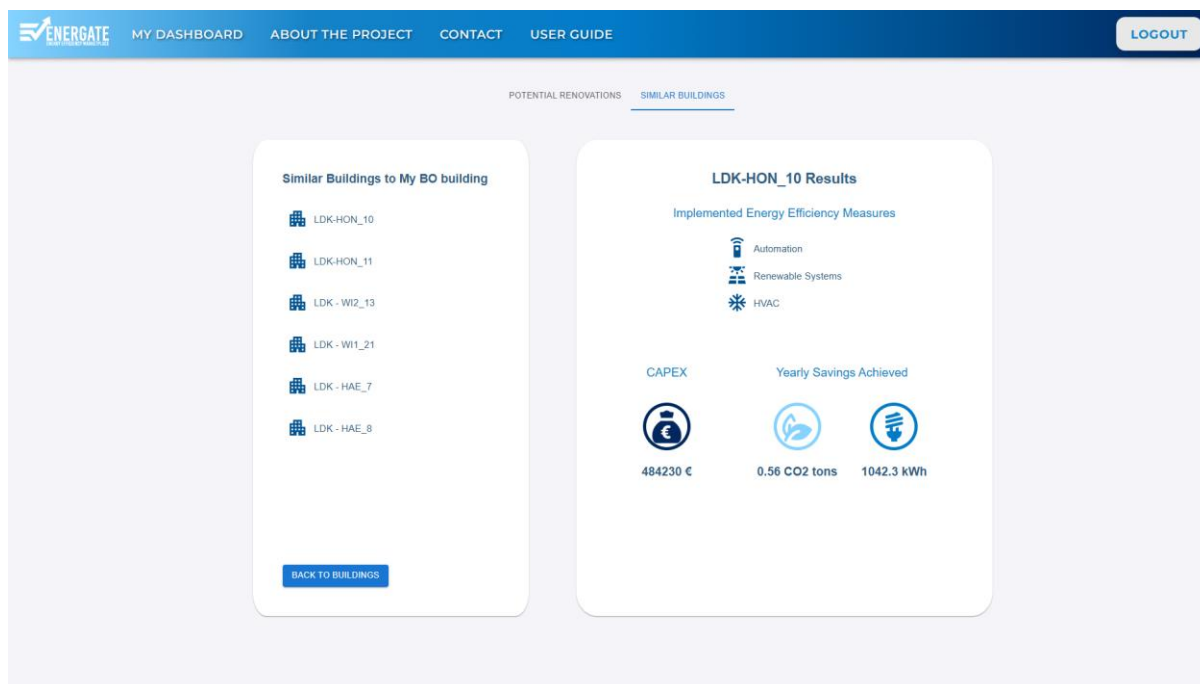


Figure 35: Results presented for a specific similar building

4.4. Notifications

If an Implementor is interested and makes an offer for a building inserted by the Building Owner, then a notification icon appears on the top left side of the building card. The user is also notified via email about new offers for their buildings, in order not to miss any of them and always be updated.

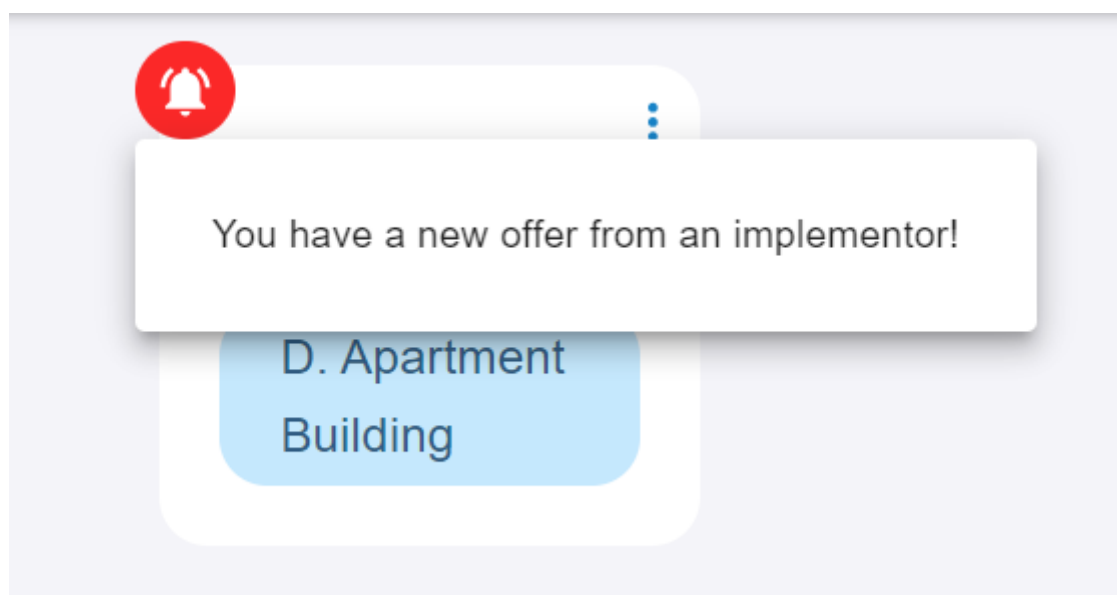
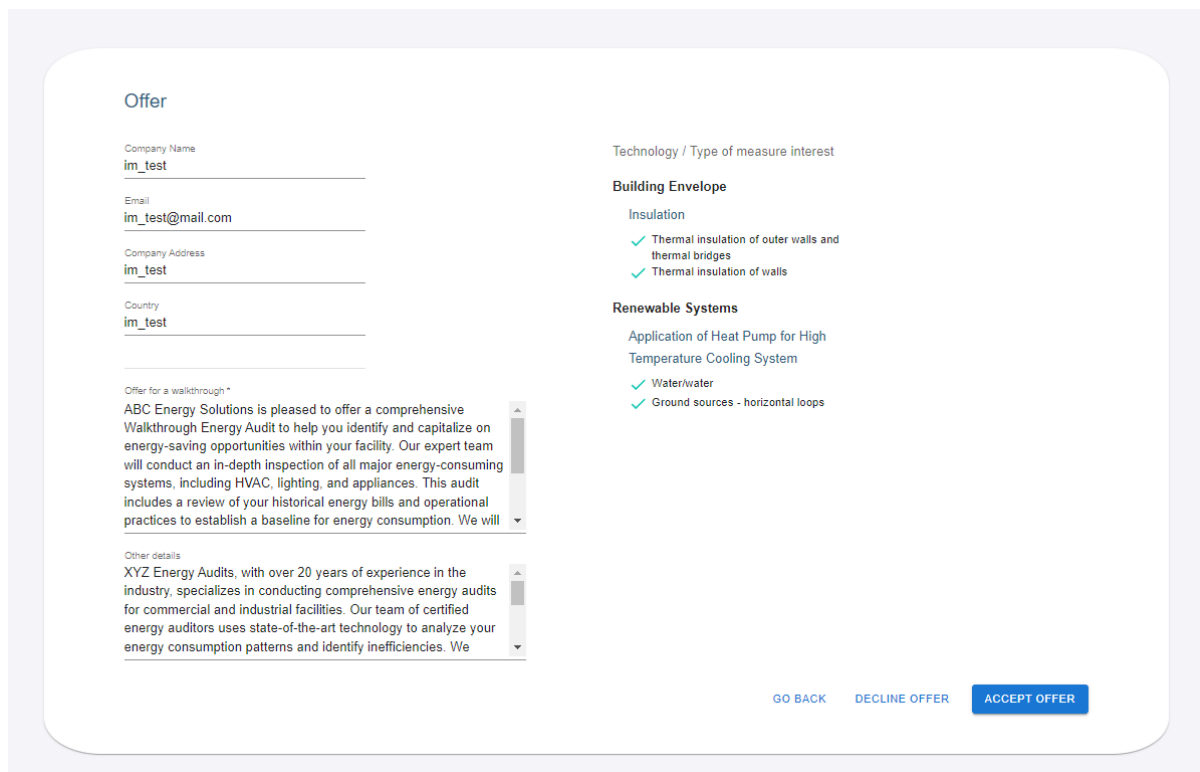


Figure 36: Implementor offer notification.

The Building Owner can see the offer by selecting the option **“You have a new offer from an Implementor”**.



Offer

Company Name
im_test

Email
im_test@mail.com

Company Address
im_test

Country
im_test

Technology / Type of measure interest

Building Envelope

Insulation

- ✓ Thermal insulation of outer walls and thermal bridges
- ✓ Thermal insulation of walls

Renewable Systems

Application of Heat Pump for High Temperature Cooling System

- ✓ Water/water
- ✓ Ground sources - horizontal loops

Offer for a walkthrough *

ABC Energy Solutions is pleased to offer a comprehensive Walkthrough Energy Audit to help you identify and capitalize on energy-saving opportunities within your facility. Our expert team will conduct an in-depth inspection of all major energy-consuming systems, including HVAC, lighting, and appliances. This audit includes a review of your historical energy bills and operational practices to establish a baseline for energy consumption. We will

Other details

XYZ Energy Audits, with over 20 years of experience in the industry, specializes in conducting comprehensive energy audits for commercial and industrial facilities. Our team of certified energy auditors uses state-of-the-art technology to analyze your energy consumption patterns and identify inefficiencies. We

GO BACK DECLINE OFFER ACCEPT OFFER

Figure 37: Building Owner offer information

Each offer includes some personal information about the Implementor, so that they can be contacted to propose an inspection of the building and find out more details about them and the offer if necessary. This information includes:

- Company Name
- Email
- Company Address
- Country

The initial offer fields are detailed in the table below:

Table 6: Initial offer information

Fields	Description
Offer for a walkthrough	This refers to the on-site inspection of the building that the Implementor will conduct. During this walkthrough, the Implementor will look at the various building systems such as lighting, HVAC, insulation, and other components to identify opportunities and appropriate energy efficiency/renewable energy measures to propose. The goal of the walkthrough is to enable the Implementor to formulate a more detailed offer that can help reduce energy consumption, lower utility costs, and enhance the overall building performance. If the Implementor deems it necessary, a detailed energy audit can be undertaken

Fields	Description
	at this stage, as long as this is agreed prior to the visit with the Building Owner.
Other details	This is a free text field where the Implementor can add any additional information about the company, and their experience and expertise.
Similar Projects in the Implementor's Portfolio (PDF)	A document or file can be uploaded showcasing similar energy-saving projects undertaken by the entity, providing a reference or comparison point.
Energy Efficiency Measures	In this section, the Implementor chooses from a dropdown list the energy efficiency/renewable energy measures that they cover and think need to be implemented in the specific building, based on the preliminary data provided for the building.

After the bilateral communication of the Building Owner and the Implementor (email exchange, walkthrough/ inspection etc.) the Building Owner will either accept or reject the offer in the platform (Figure 37).

After an offer has been accepted and the building is matched with the Implementor, the Building Owner can review the offer by clicking on the green icon on the top left corner of the building card, as seen in Figure 38.

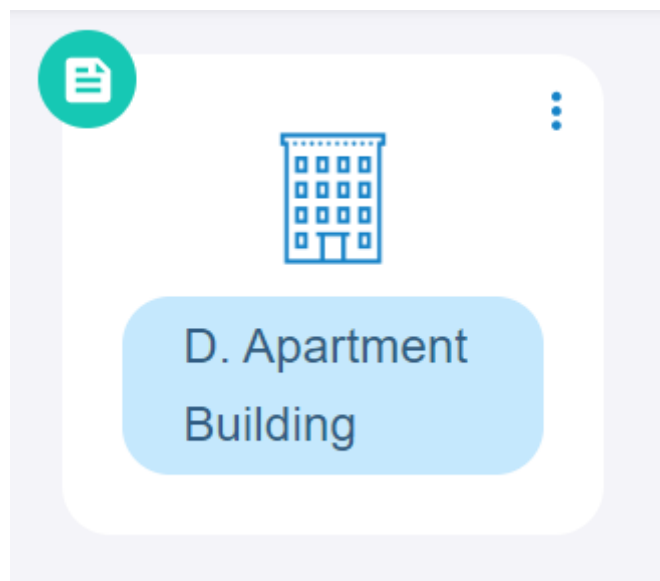


Figure 38: Detailed offer icon

When clicking on the icon, the user is redirected to a new page containing two tabs, the initial offer, and the finalised offer, once it has been added by the Implementor.

INITIAL OFFER

FINAL OFFER

Initial Offer

Company Name

im_test

Email

im_test@mail.com

Company Address

im_test

Country

im_test

Technology / Type of measure interest

Building Envelope

Insulation

✓ Thermal insulation of outer walls and thermal bridges

✓ Thermal insulation of walls

Renewable Systems

Application of Heat Pump for High Temperature Cooling System

✓ Water/water

✓ Ground sources - horizontal loops

Offer for a walkthrough *

ABC Energy Solutions is pleased to offer a comprehensive Walkthrough Energy Audit to help you identify and capitalize on energy-saving opportunities within your facility. Our expert team will conduct an in-depth inspection of all major energy-consuming systems, including HVAC, lighting, and appliances. This audit includes a review of your historical energy bills and operational practices to establish a baseline for energy consumption. We will

Other details

XYZ Energy Audits, with over 20 years of experience in the industry, specializes in conducting comprehensive energy audits for commercial and industrial facilities. Our team of certified energy auditors uses state-of-the-art technology to analyze your energy consumption patterns and identify inefficiencies. We

GO BACK

Figure 39: Initial offer

INITIAL OFFER

FINAL OFFER

1

2

Step One

Step Two

Offer Finalization 1/2

Technology / Type of measure interest

Building Envelope

Insulation

✓ Thermal insulation of outer walls and thermal bridges

✓ Thermal insulation of walls

Windows

✓ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Project's details for which finance is needed

Country

Greece

Province / Region

Athens

Climate Zone

B

Energy Savings Assessment

Building Envelope

Electricity savings *

9000

KWh/year

Thermal savings *

1000

KWh/year

Total (Electricity) *

9000

KWh/year

Total (Thermal) *

1000

KWh/year

Investment - Upfront Payment Needed

10000

€

Estimated CO2 Abatement *

100

tCO₂/year

Measurement & Verification Protocol

DOWNLOAD

Energy Class after Implementation *

B

Payback Period (years)

Payback Period for building envelope *

10

NEXT

Figure 40: Final offer step one

At the final offer step one tab, the Building Owner is being provided with information regarding the finalised offer from the Implementor. These fields are:

Table 7: Final offer information

Fields	Description
Project details for which finance is needed	The Implementor fills in the project details for which finance is to be provided.
Energy Savings Assessment (kWh/year) • Building Envelope • Lighting • HVAC, heat pumps, automation etc. • Photovoltaics	An evaluation of the expected annual energy savings from the project, measured in kilowatt-hours per year, is provided. The values that are being displayed are only the values that correspond to each measure category. For example, at Figure 40 the Implementor has selected only measures relating to the building envelope. That is why only these energy assessment values are being displayed.
Estimated CO₂ Abatement (tCO₂/year)	The projected reduction in carbon dioxide emissions as a result of the implementation of the projects is provided.
Measurement and Verification Protocol	(File) The methodology, standards and verification frequency/schedules that will be used to verify energy savings and the performance of the project is provided.
Energy Class After implementation	The anticipated energy efficiency classification of the building(s) or facility after the project is completed.
Investment-Upfront payment needed (€)	The initial investment or upfront payment required by the Building Owner, if applicable, to start the project.
Payback Period (years) • Building Envelope • Lighting • HVAC, heat pumps, automation etc. • Photovoltaics	The time it will take for the cost savings of the project to cover the initial investment costs.

INITIAL OFFER FINAL OFFER

✓
Step One

2
Step Two

Offer Finalization 2/2

Final offer for the project _____

Type of contract proposed

☐ Power Purchase Agreement

☐ As a Service

☐ Energy Performance Contract (EPC)

☐ Operating Lease

☒ Other

Stage of project

☒ Implementation

☐ Operational

☐ Incipient / Design

Construction Finance

☐ Bridge Loan

☒ Own Funds

☐ Other

Contribution by End Client

40 _____ %

[BACK](#)

Figure 41: Final offer step two

Table 8: Final offer step two "Type of contract"

Type of contract proposed	Description
Power Purchase Agreement	A Power Purchase Agreement (PPA) is a legal contract between an electricity producer (often a renewable energy company) and a buyer (typically a utility, large corporation, or government entity). The agreement outlines the terms for the sale and purchase of electricity, including the price, quantity, and duration of the contract.
As a service	Business model where services are provided on a subscription or pay-per-use basis.
Energy Performance Contract	Agreement where an energy service company implements energy-saving measures in client facilities, recovering the investment through the savings generated.
Operating Lease	Lease where the lessee uses an asset for a period, with the lessor retaining ownership and responsibility for maintenance.

Table 9: Final offer step two "Stage of the project"

Stage of the project	Description
Implementation	This stage is when the project moves from planning to action. The project is actively being built, developed, or installed. This is where the physical work happens, and resources are deployed to make the project a reality.
Completed	The project is fully completed and the building/installation is now functioning as intended. It is in regular use and is producing the expected outcomes.
Incipient/Design	This stage involves the early planning and design of the project. The project is still at the conceptual phase, where key aspects such as feasibility, technical requirements, scope, and design are being developed.

Table 10: Final offer step two "Construction Finance"

Construction Finance	Description
Bridge Loan	A bridge loan is a short-term loan designed to provide temporary financing until a more permanent funding source becomes available or an existing obligation is removed. It provides immediate funding for construction or operational needs until long-term financing is secured or other funds (such as revenues from the project) become available.
Own Funds	This refers to the use of the project developer's or owner's own financial resources to fund the construction. Instead of taking out loans, the developer finances the project using internal capital, company reserves, or own funds.

4.5. Financial Products

By clicking on "**Financial Products**" the user can access the available Financial Products added by Financiers to support and fund the energy efficiency upgrades of their buildings. Financial Products refers to a range of financial products and instruments that are developed and offered by Financiers (such as banks, green investment funds, credit unions, and public financing bodies) with the specific aim of enabling Building Owners to invest in energy efficiency upgrades.

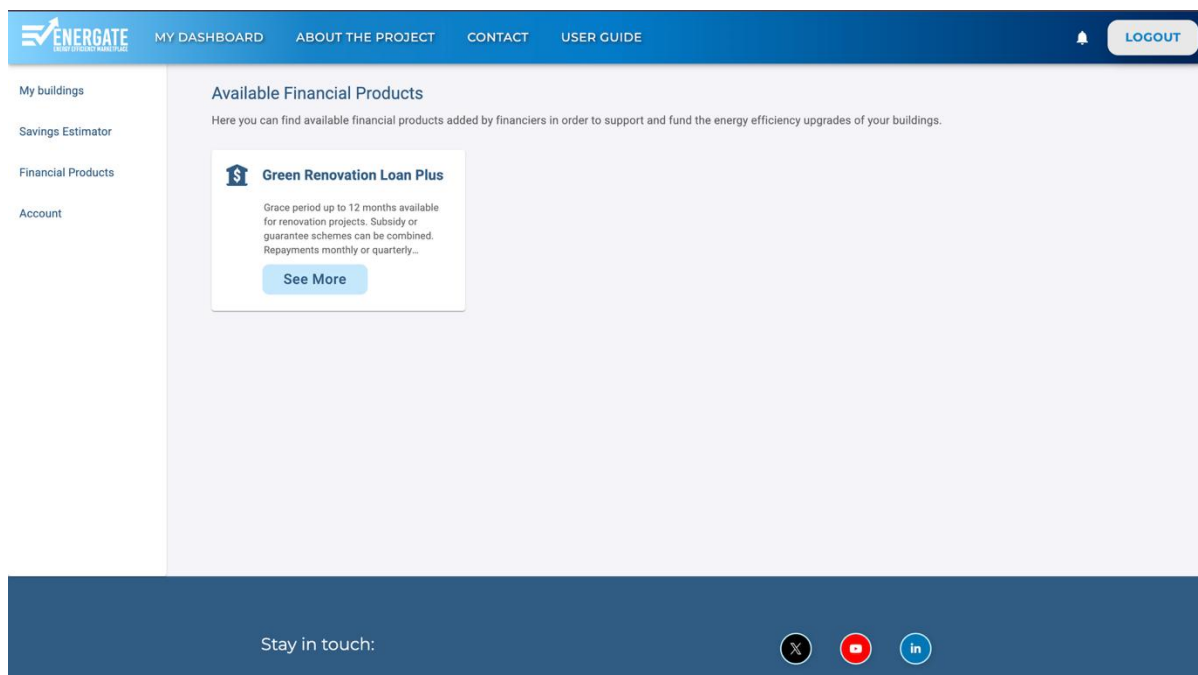


Figure 42: Available Financial Products

By selecting the “**See More**” button the Building Owner can access further information about that specific Financial Product and choose which building needs to be financed with that funding solution. The matched buildings appear as checkboxes and the Building Owners can select which building project they want to fund. After they select the building they want to finance, the Financier gets notified for the Building Owner’s interest (Figure 45).

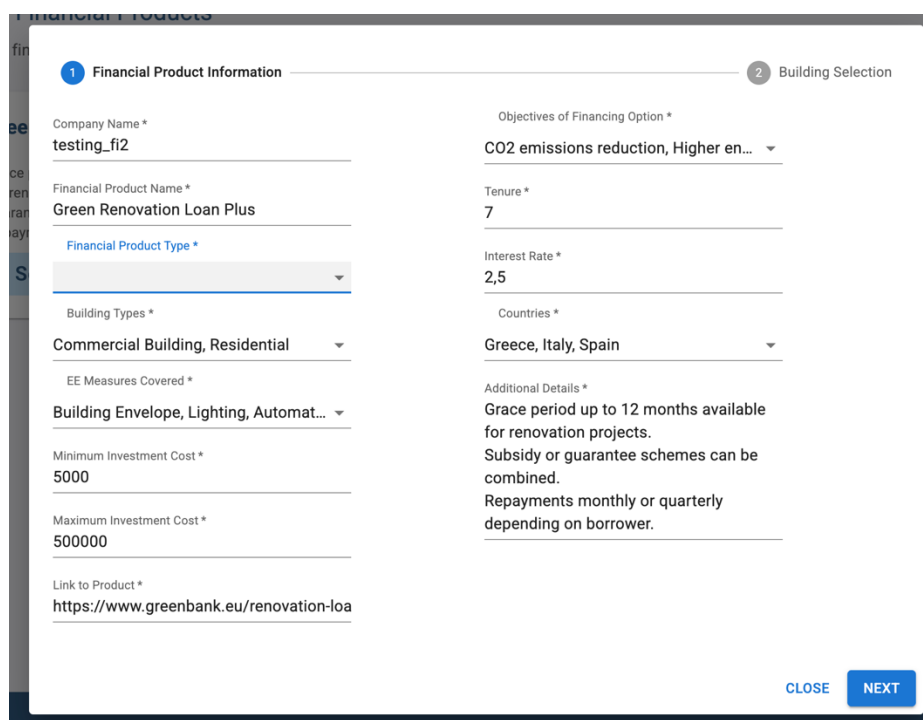


Figure 43: Further information for a Financial Product

✓ Financial Product Information

2 Building Selection

Select the buildings you would like to finance

☐


Central Offices

☐


1

CLOSE

BACK

Figure 44: Matched buildings for a Financial Product

✓ Financial Product Information

✓ Building Selection

Notify the financier that you are interested!

SAVE AND NOTIFY

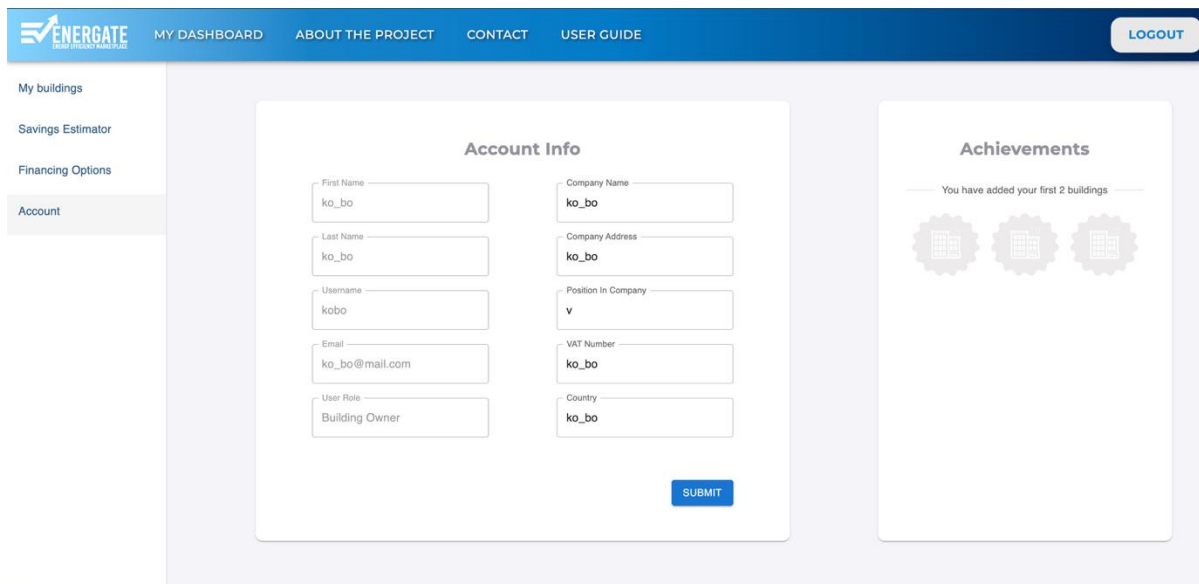
CLOSE

BACK

Figure 45: Notify the Financier

4.6. Building Owner account information

Using the left-side navigation bar the user can check their account information by selecting the “**Account**” option.



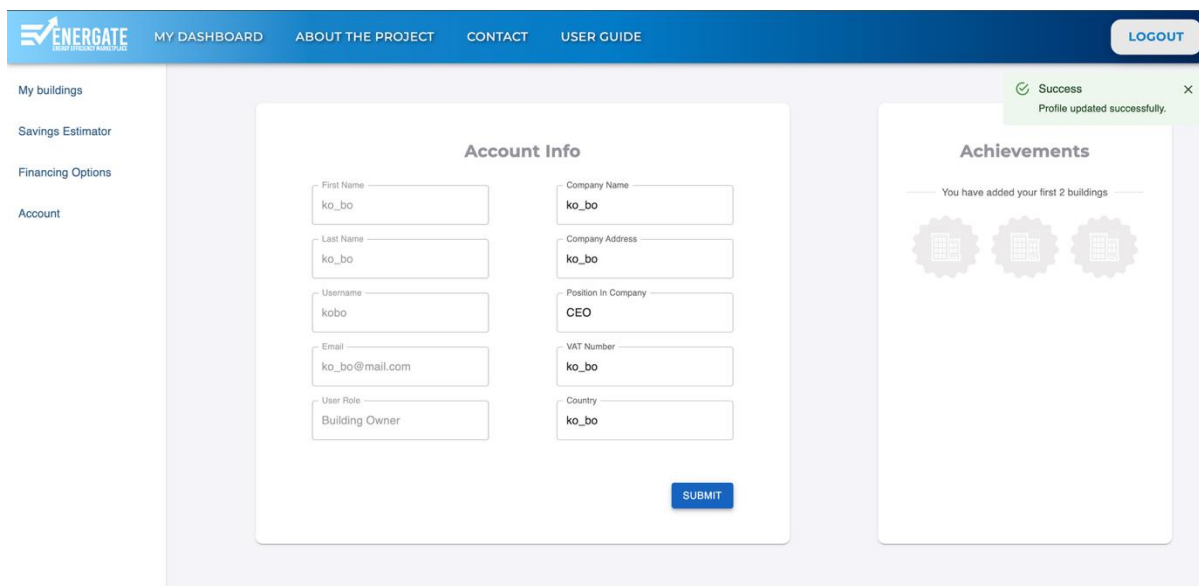
The screenshot shows the 'Account Info' section of the user dashboard. The left sidebar has 'Account' selected. The main content area contains a form with the following fields:

Account Info	
First Name ko_bo	Company Name ko_bo
Last Name ko_bo	Company Address ko_bo
Username kobo	Position In Company v
Email ko_bo@mail.com	VAT Number ko_bo
User Role Building Owner	Country ko_bo

A 'SUBMIT' button is located at the bottom right of the form. To the right of the form is an 'Achievements' section titled 'You have added your first 2 buildings' with three gear icons.

Figure 46: Building Owner account information

The user can also update any of the fields that are being displayed and submit the updated information.



This screenshot shows the same 'Account Info' form as in Figure 46, but with a 'Success' message at the top right: 'Success Profile updated successfully.' The 'Position In Company' field now contains 'CEO' instead of 'v'. The 'SUBMIT' button is still present at the bottom right of the form.

Figure 47: Building Owner profile update

There is also some extra information on the account tab regarding the achievements of a user.

The “**Achievements**” section rewards Building Owners for their contributions and engagement on the platform. These visual badges are automatically awarded as the Building

Owners complete key milestones and help them track their impact and activity. Below are the main use cases tied to achievements:

Table 11: Type of achievements

Badges/Notifications	Description
Total Buildings Added	As the user adds buildings to the platform, badges will be awarded based on their total number of buildings: • 5 buildings • 10 buildings • 20+ buildings
Performance percentile	Building Owners will receive a badge if their number of buildings places them among the top-performing users: • Top 5% • Top 10% • Top 20%
Match alert (informative)	When a Building Owner adds a building that aligns with an Implementor's country and coverage area, a notification will be triggered.

5. Public Body

Upon logging in, Public Bodies gain access to dashboard where they can add and manage buildings. An example of a Public Body's dashboard is being displayed below. By clicking on the “+” button, the user can add a new building. The user also has the option to update the building information, or delete it, by clicking on the three dots on the specific building.

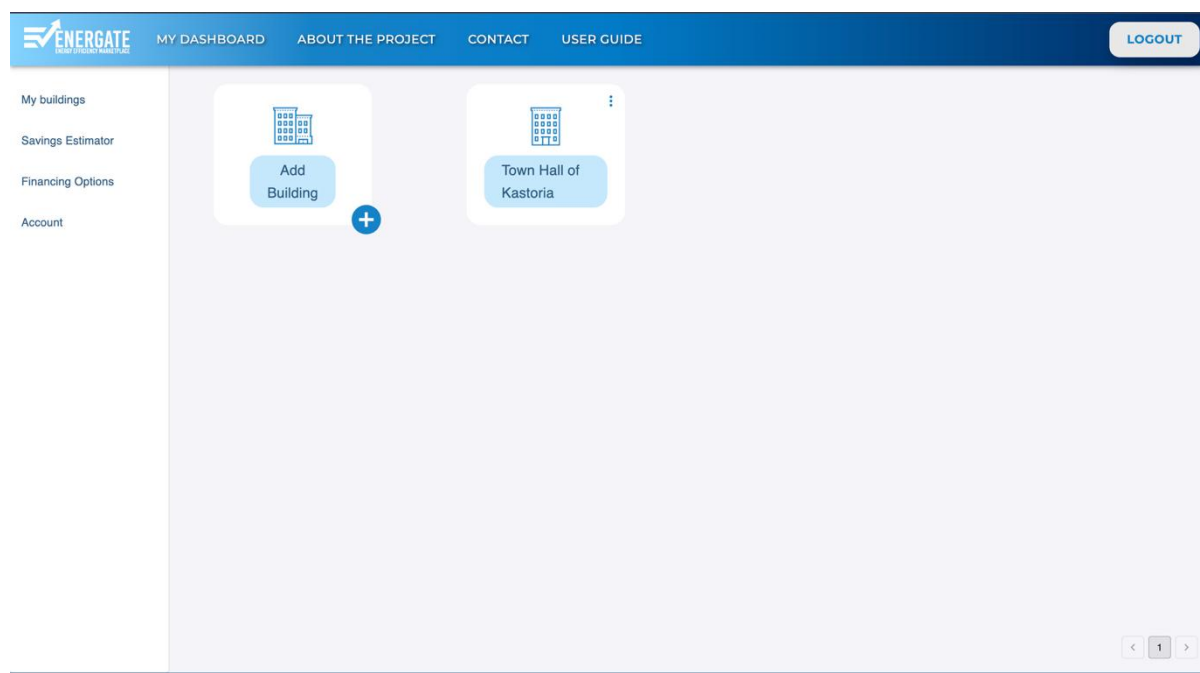


Figure 48: Public Body dashboard

The dashboard provided to the Public Bodies has the same four options as the Building Owner that can be accessed through the side drawer:

- My buildings: Here Public Bodies can add a building, review the old ones and make adjustments, if necessary.
- Savings Estimator: The user can access the ENERGATE Savings Estimator and understand how different energy efficiency measures can affect their buildings, to better support the decision-making process.
- Financing Options: This section provides a list of financing options that are available to support the user's building's energy efficiency upgrades. These options are offered by Financiers such as banks and private institutions. Each option is designed to help Public Bodies cover the costs of various energy-saving improvements.
- Account: Here the user can view their account information.

5.1. Adding a building

To add a new building, the user needs to select the add icon at the bottom right of the “**Add building**” card. After that, the user will be redirected to a page with six different tabs, similarly

to the Building Owner case. The user is then requested to fill in the necessary information about the building, as described throughout this section.

5.1.1. Building Details

Starting off with the Building Details tab, a Public Body needs to fill in the building details as described in chapter 4.1.1 with the addition of the Project Link. Since the Public Bodies cannot directly assign Implementors through the platform if a project exceeds the tender threshold², the projects web address is required to enable Implementors and Financiers to find more information about the project outside the platform.

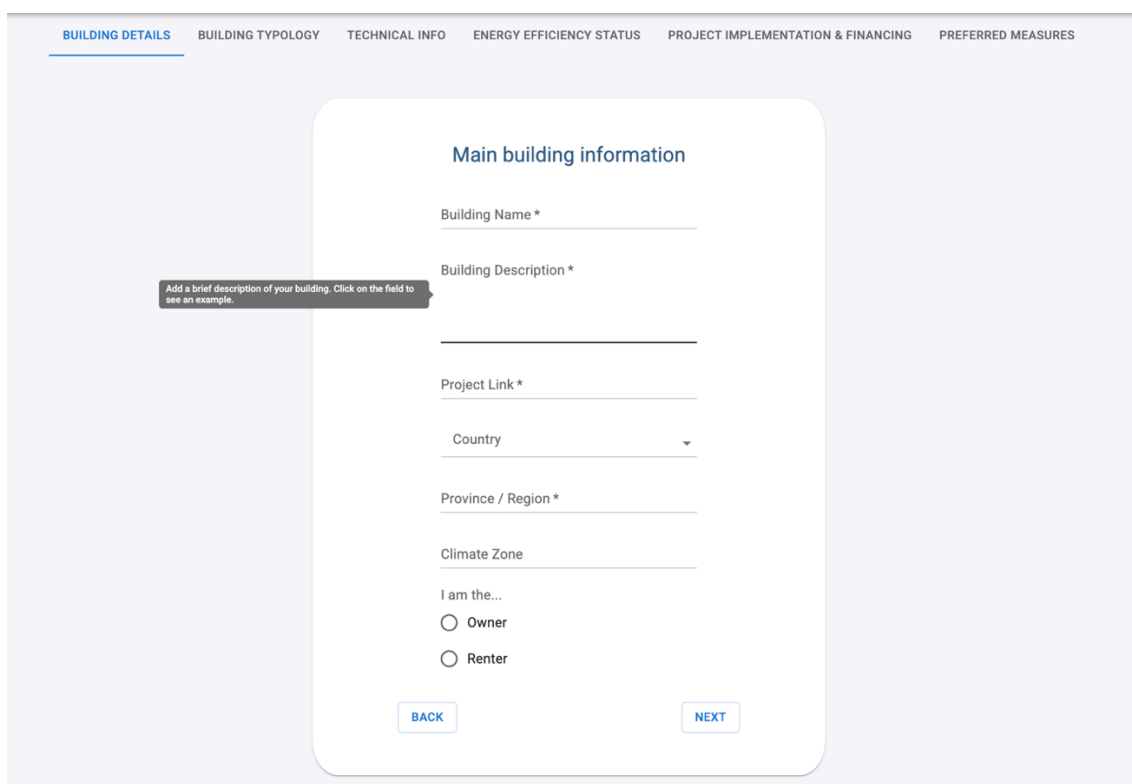


Figure 49: Building Details

² The “tender threshold” refers to an amount of CAPEX, predefined for each country, above which a Public Body/ Municipality cannot directly assign a project to a technical team. Instead, a public procurement must take place, where different Implementors participate, and the one who provides the most promising offer is awarded with the project. This process is standardised, and due to legal limitations, it needs to be carried out through the official channels of the Public Body, thus it is facilitated through the platform but not conducted directly. Projects that are below the tender threshold, on the other hand, can be directly assigned to Implementors. In this case, the ENERGate platform can support direct matched between Public Bodies and Implementors.

5.1.2. Building Typology

Progressing to the next tab, Building Typology, the user needs to choose only the type of building they are adding. The options are different than those of the Building Owner case, since they are addressed to public buildings.

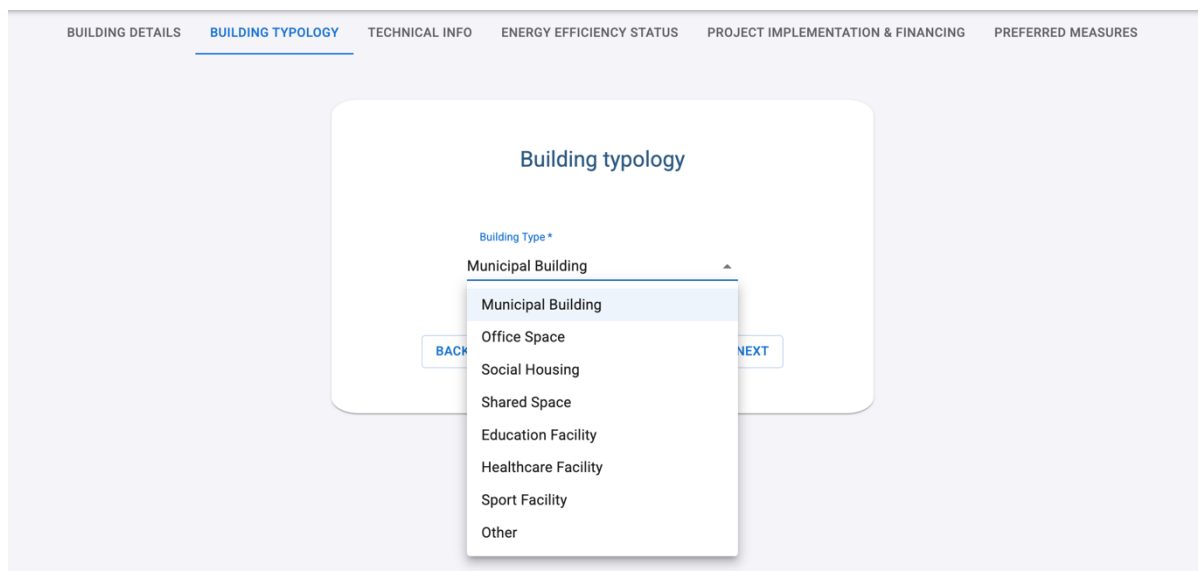


Figure 50: Building Typology

5.1.3. Technical Info & Energy Efficiency Status

The “**Technical Info**” and “**Energy Efficiency Status**” tabs are the same with the ones for the Building Owner. An analysis of them is contacted in [Chapters 4.1.3](#) and [4.1.4](#).

5.1.4. Project Implementation & Financing

In the “**Project Implementation & Financing**” Tab, the user has to select if they already have an Implementor that has undertaken the project, whether the project costs will be above or below the tender threshold, if financing is required or not, and if they are interested in any of the available EU funding solutions.

BUILDING DETAILS
BUILDING TYPOLOGY
TECHNICAL INFO
ENERGY EFFICIENCY STATUS
PROJECT IMPLEMENTATION & FINANCING
PREFERRED MEASURES

Project Implementation & Financing

Project's Implementation & Costs

An implementor has already undertaken this project

☐ Yes
☒ No

The project costs are expected to...

☐ Be below the tender threshold
☐ Be above the tender threshold

Type of Financing

☒ No Finance Needed
☐ Need Financing

☐ EU Funding

- ☐ European Regional Development Fund (ERDF) ⓘ
- ☐ European Social Fund PLUS (ESF+) ⓘ
- ☐ European Agricultural Fund for Rural Development (EAFRD) ⓘ
- ☐ Public sector Loan Facility under Just Transition Fund (PSLF) ⓘ
- ☐ Connecting Europe Facility (CEF) ⓘ
- ☐ EU renewable energy financing mechanism ⓘ
- ☐ European Energy Efficiency Fund ⓘ

Figure 51: Project Implementation & Financing

The user has three questions to answer regarding the:

- Project's Implementation & Costs
- The expected project costs relatively with the tender threshold
- Type of Financing

Starting from the Project's Implementation & Costs, Public Bodies need to specify whether a contractor/Implementor (e.g., ESCO or construction firm) is already engaged for this project. This helps the platform decide if it should skip Implementor-matching or prepare it for you. The options here are:

- **Yes** – An Implementor is already engaged. The platform will skip Implementor-matching and proceed to the Financier-matching process.
- **No** – You haven't engaged an Implementor yet. The platform will enable Implementor-matching in later steps.

If users select 'Yes', they must enter the Implementor's company name already engaged on the project.

Note: If 'Yes' is selected, the project costs are automatically set to Above the tender threshold.

Project's Implementation & Costs

An implementor has already undertaken this project

☒ Yes

☐ No

Please specify the implementor's company

Project costs are automatically set to be **above** the tender threshold.

Figure 52: An Implementor has already undertaken the project

If the users select “**No**” on the previous section they now need to specify whether the project expected costs will be above or below the tender threshold-the cost level that triggers formal public-procurement procedures. The options here are two:

- Be below the tender threshold
- Be above the tender threshold

The project costs are expected to...

☒ Be below the tender threshold

☐ Be above the tender threshold

Figure 53: Expected Project Costs

Depending on what they choose this will affect their next steps:

- If “**Below the tender threshold**” is selected, Implementors can submit an offer in the platform.
- If “**Above the tender threshold**” is selected, Implementors can only express interest.

Regarding the Type of Financing, Public Bodies have three different options:

- No Finance Needed
- Need Financing
- EU Funding

If the user selects the EU funding, a list of different EU funding options appears, allowing the Public Body to access relevant information and indicate preferences. These options are:

Table 12: EU Funding options

EU Funding
European Regional Development Fund (ERDF)
European Social Fund Plus (ESF+)
European Agricultural Fund for Rural Development (EAFRD)

EU Funding
Public sector Loan Facility under Just Transition Fund (PSLF)
Connecting Europe Facility (CEF)
EU renewable energy financing mechanism
European Energy Efficiency Fund (EEEF)
European Local ENergy Assistance (ELENA)
Recovery and Resilience Facility (RRF)
Cohesion Fund (CF)

Next to each option there is a “**See more**” tab. The user can click on this and find more information about each EU funding option. For example, for the **European Regional Development Fund (ERDF)** the following information is provided:

Funding Information

The **European Regional Development Fund (ERDF)** provides funding to public and private bodies in all EU regions to reduce economic, social and territorial disparities. The Fund supports investments through dedicated national or regional programmes.

Possible requirements to apply:

- Energy audit
- Coherent financial plan, cost - benefit analysis
- Estimated budget and timeline
- Alignment with the goals of the ERDF and relevant regulation.

You are advised to contact local managing authorities for more information.

You can visit the following links for more information:

- [About the ERDF](#)
- [The European Regional Development Fund / Cohesion Fund | fi-compass](#)
- [ERDF website](#)
- [Energy-efficiency-model_0.pdf \(fi-compass.eu\)](#)
- [The Cohesion policy legislative package 2021-2027](#)

CLOSE

Figure 54: European Regional Development Fund information:

5.1.5. Preferred Measures

The “Preferred Measures” tab is the same with the one in [Chapter 4.1.6](#) for the Building Owner.

5.2. Updating & deleting a building

The user can delete a building or update any of the building’s information added previously, by using the top right icon of the building’s card, similarly to [Chapter 4.2](#).

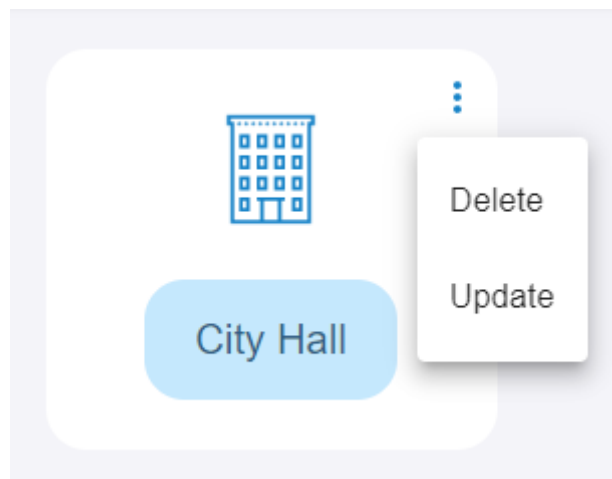


Figure 55: Updating or deleting a building

5.3. Savings Estimator

By clicking on “[Savings Estimator](#)” in the side drawer, the user is redirected to the potential renovations service, where they can examine how different energy efficiency measures affect their buildings. This is the same service described in [Chapter Error! Reference source not found.](#), and it offers the same functionalities for the public buildings.

5.4. Notifications

If an Implementor is interested and makes an offer for a building inserted by the Public Body, then a notification icon appears on the top left side of the building card. The user is also notified via email about new offers for their buildings, in order to not miss any of them and always be updated.

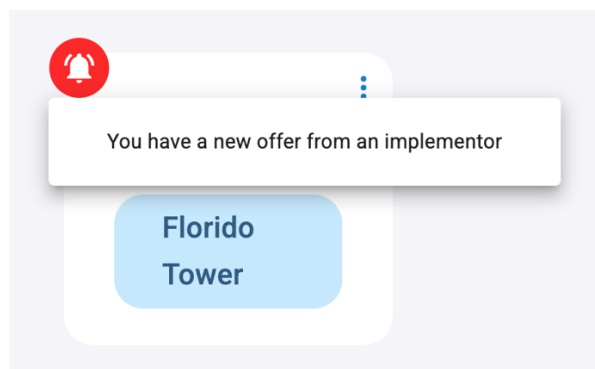


Figure 56: Implementor offer notification

The Public Body can see the offer by selecting the option ***“You have a new offer from an Implementor”***.

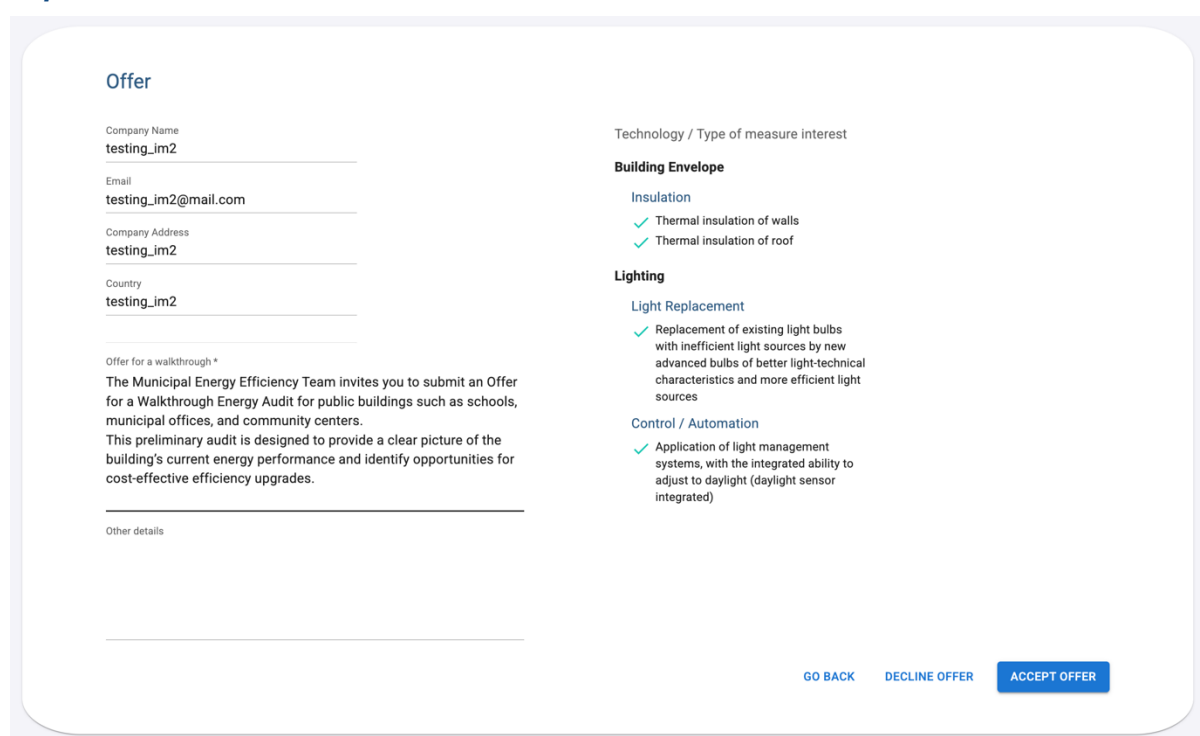

 The form is titled "Offer". It contains two main sections. The left section is for company details: Company Name (testing_im2), Email (testing_im2@mail.com), Company Address (testing_im2), and Country (testing_im2). Below this is a section for a walkthrough offer, which includes a paragraph about the Municipal Energy Efficiency Team inviting the user to submit an offer for a Walkthrough Energy Audit for public buildings. The right section is titled "Technology / Type of measure interest" and contains two sub-sections: "Building Envelope" with "Insulation" (checked for thermal insulation of walls and roof) and "Lighting" with "Light Replacement" (checked for replacement of existing light bulbs) and "Control / Automation" (checked for application of light management systems). At the bottom right are three buttons: "GO BACK", "DECLINE OFFER", and "ACCEPT OFFER".

Figure 57: Initial Offer

Each offer includes some personal information about the Implementor, so that they can be contacted to propose an inspection of the building and find out more details about them and the offer if necessary. This information includes:

- Company Name
- Email
- Company Address
- Country

The initial offer fields are described in Table 6.

After the bilateral communication of the Public Body and the Implementor (email exchange, walkthrough/ inspection etc.) the Public Body will either accept or reject the offer in the platform (Figure 57)

After an offer has been accepted and the building is matched with the Implementor, the Public Body can review the offer by clicking on the green icon on the top left corner of the building card, as seen in Figure 58.

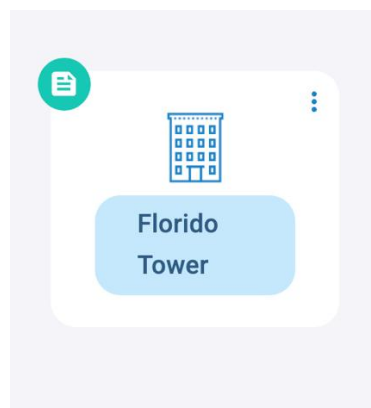


Figure 58: Detailed offer icon

When a Public Body has already found an Implementor for their building they can receive offer from a Financier as it is being analysed in [Chapter 7.3](#). After the Financier uploads their term sheet the Public Body receives a notification.

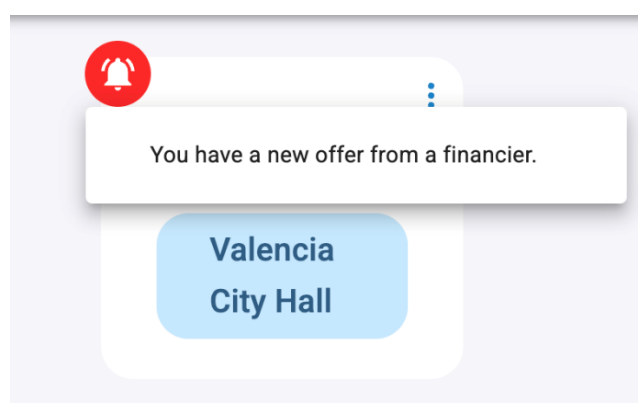


Figure 59: Financier offer

By clicking the “**You have a new offer from a Financier**” the user can download the term sheet the Financier provided and choose to accept or to decline it.

Financier Offer

Download the financier's term sheet here:

DOWNLOAD

GO BACK
DECLINE OFFER

ACCEPT OFFER

Figure 60: Financier offer (2)

5.5. Public Body Financing Options

By clicking on “**Financing Options**” the user can access the available Financing Options added by Financiers in order to support and fund the energy efficiency upgrades of their buildings. This is the same service described in **Chapter 4.5**, and it offers the same functionalities for the public buildings.

5.6. Public Body account information

Using the side drawer the user can check their account information by selecting the “**Account**” option.



[MY DASHBOARD](#)
[ABOUT THE PROJECT](#)
[CONTACT](#)
[USER GUIDE](#)



LOGOUT

My buildings
 Savings Estimator
 Financing Options
Account

Account Info

First Name test testing_pb3	Organisation Name testing_pb3
Last Name testing_pb3	Organisation Address testing_pb3
Username testing_pb3	Position in Organisation testing_pb3
Email testing_pb3@mail.com	VAT Number testing_pb3
User Role Region	Country testing_pb3

SUBMIT

Figure 61: Public Body account information

The user can also update any of the fields that are being displayed and submit the updated information.


[MY DASHBOARD](#)
[ABOUT THE PROJECT](#)
[CONTACT](#)
[USER GUIDE](#)
LOGOUT

[My buildings](#)
[Savings Estimator](#)
[Financing Options](#)
[Account](#)

Account Info

First Name testing_pb3	Organisation Name testing_pb3
Last Name testing_pb3	Organisation Address testing_pb address
Username testing_pb3	Position in Organisation testing_pb3
Email testing_pb3@mail.com	VAT Number testing_pb3
User Role Region	Country testing_pb3

SUBMIT

Success
 Profile updated successfully.

Figure 62: Public Body profile update

6. Implementor

6.1. Private Buildings

As soon as an Implementor logs in to the platform using their credentials, they are redirected to the main dashboard. The default dashboard for an Implementor shows matched buildings. The matched buildings are being divided into two categories, Private Buildings and Public Buildings. By choosing one of these two categories, the Implementor can see the corresponding buildings' details.

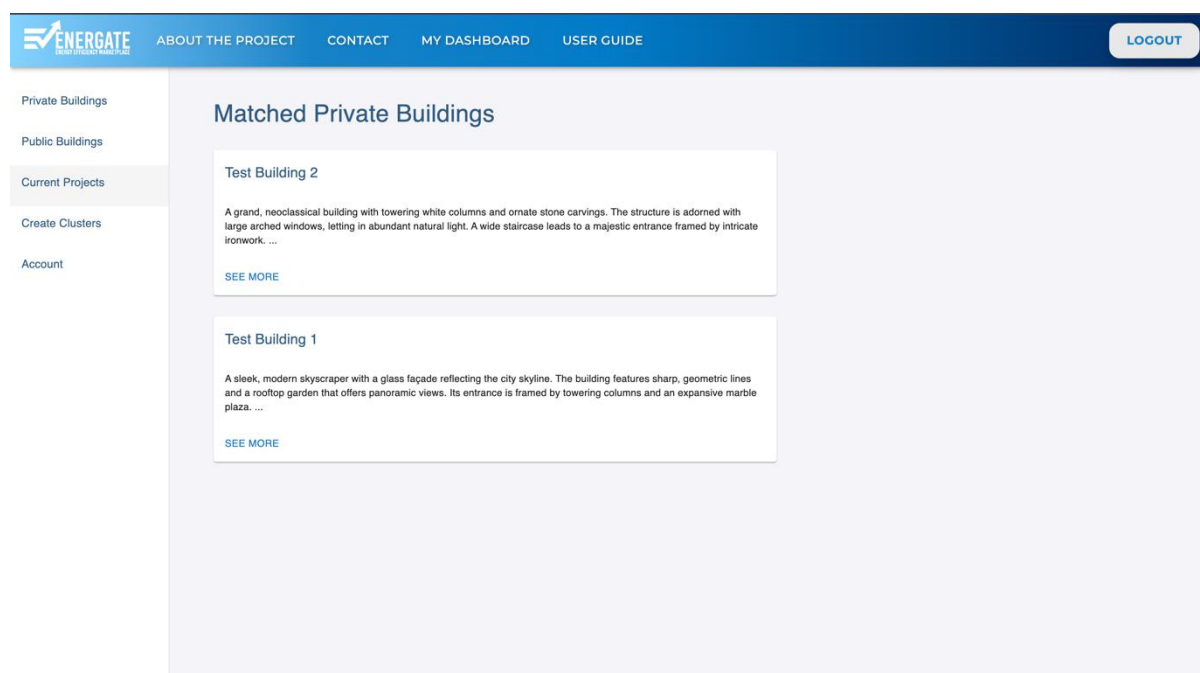


Figure 63: Implementor main dashboard

6.2. Public Buildings

Implementors can open Public Buildings from the left navigation drawer to act on candidate public projects. The page is organised into two tabs based on the **tender threshold**:

- Below Tender Threshold
- Above Tender Threshold

6.2.1. Below Tender Threshold buildings

For the buildings that are listed in the Below Tender Threshold tab Implementors can submit an Offer for the project. For the offer process please go to **Chapter 6.3**.

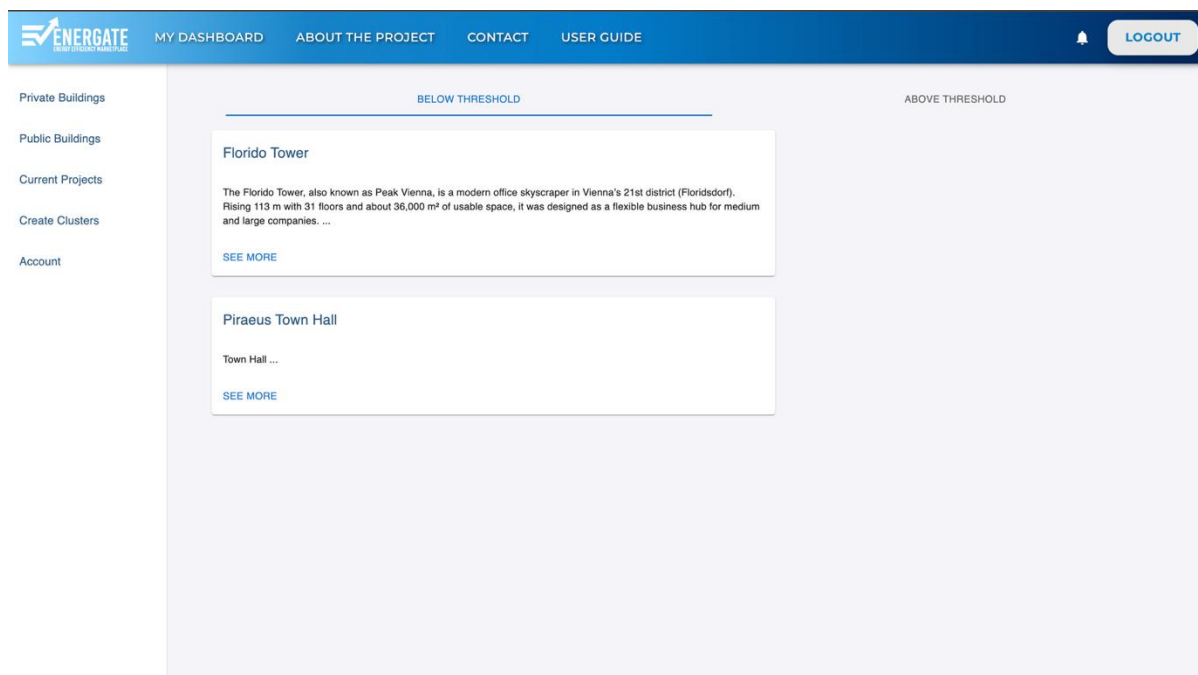


Figure 64: Below Threshold buildings

When Implementors reach the “**Desired Measures & EPC**” tab, they have the option to submit an offer for the building. For the offer submission go to **Chapter 6.3**.

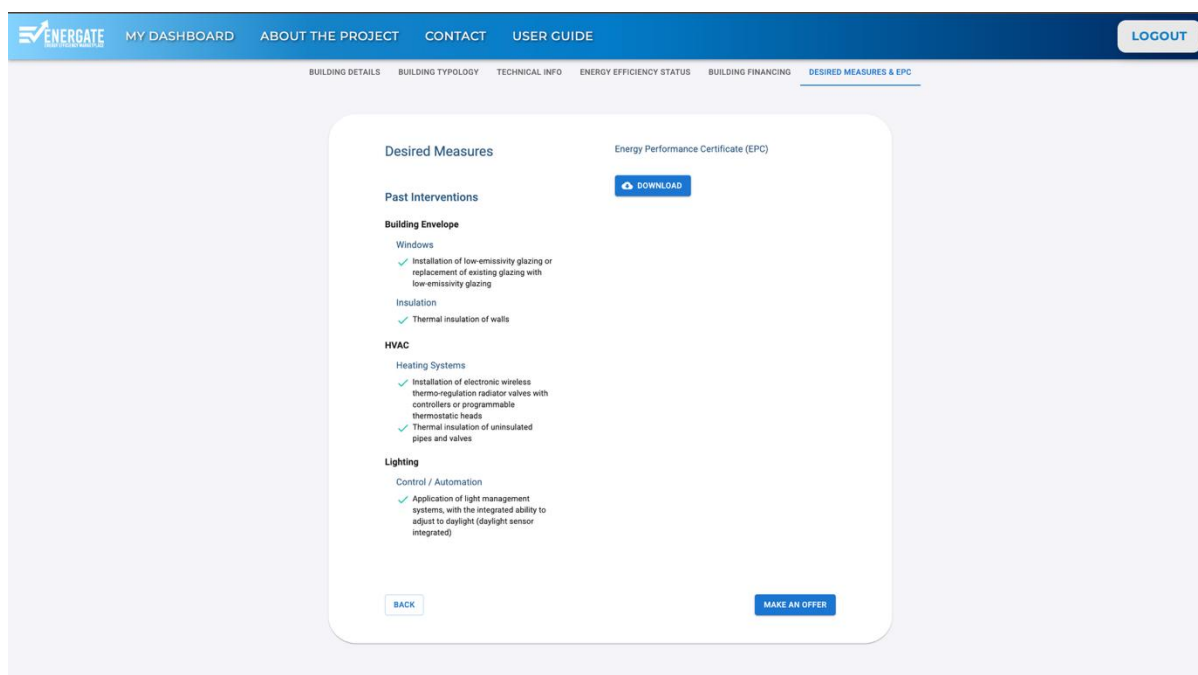


Figure 65: Offer for a Public Building

6.2.2. Above Tender Threshold Buildings

For the buildings that are listed in the Above Tender Threshold tab Implementors can Express Interest only. This makes the Implementor visible to Financiers, who can review which Implementors have expressed interest and choose to cooperate with one of them.

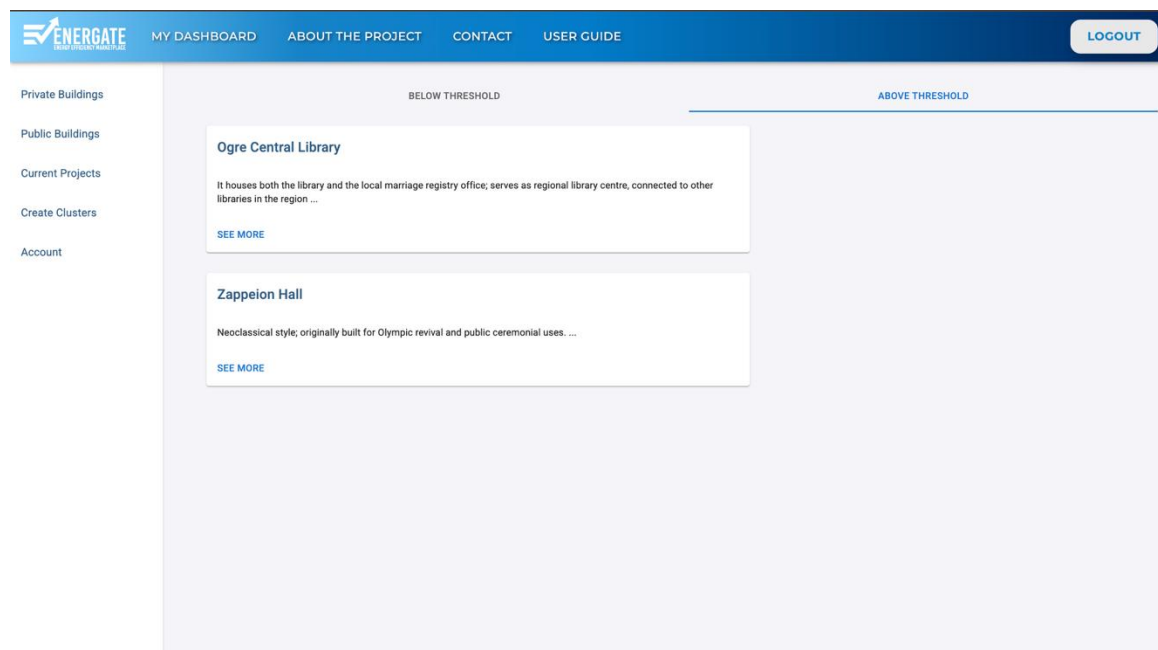


Figure 66: Above Threshold buildings

When Implementors reach the “**Desired Measures & EPC**” tab, they have the option to express their interest about that building by selecting the button “***I am interested***” at the bottom right corner.

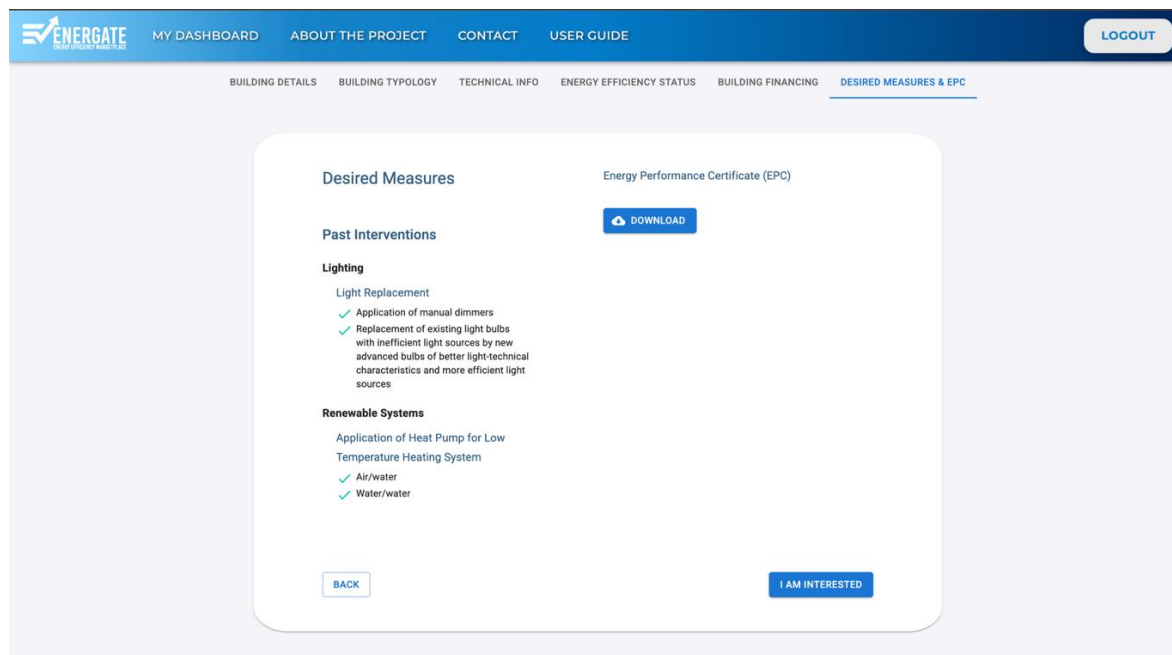


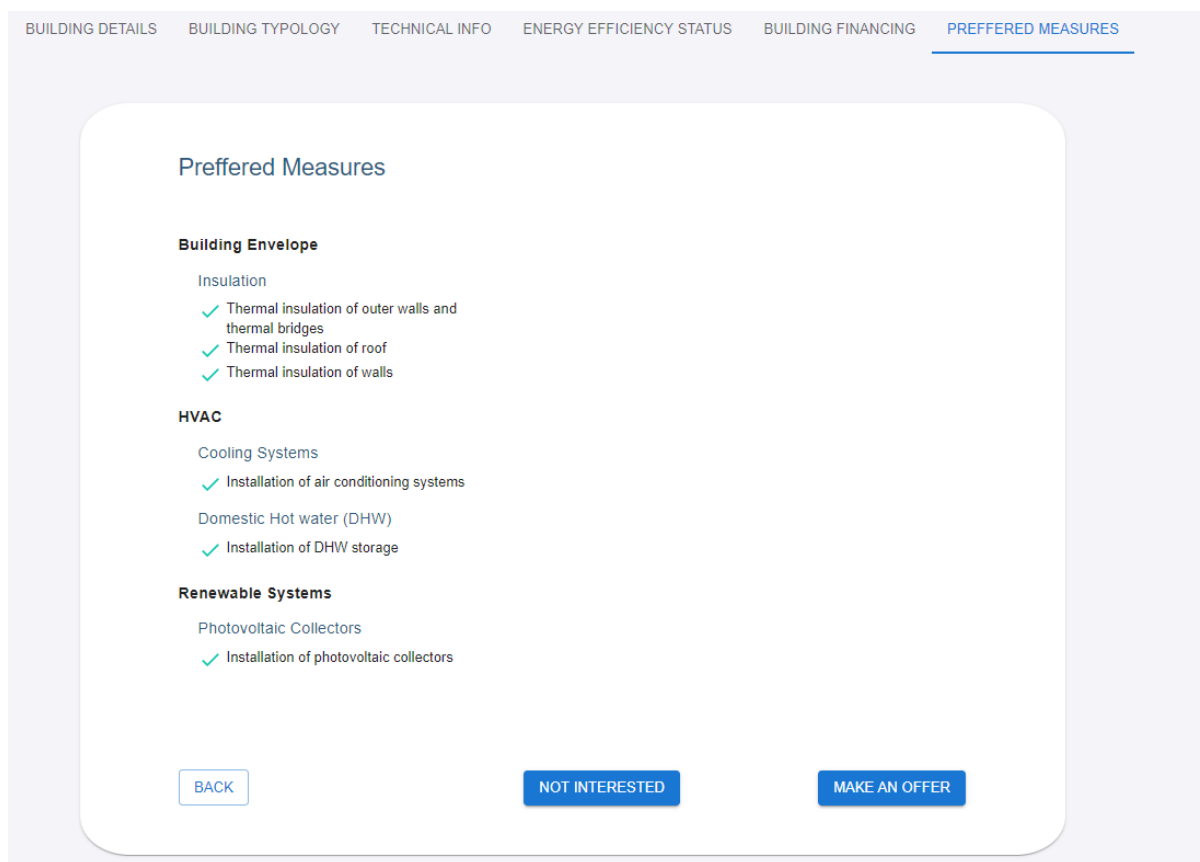
Figure 67: Express Interest

Note: For above-threshold projects, any cooperation is informational and non-binding until the formal procurement process concludes.

6.3. Preparing an offer

By clicking on the **“See more”** option on a building card, the Implementor can view the building more extensively and decide if they want to create an offer. More specifically, the user is redirected to a new page, where the building information, as filled in by the Building Owner, is presented. The user can inspect the building’s information from the tabs: Building Details, Building Typology, Technical Info, Energy Efficiency Status, Building Financing and Preferred Measures.

When the Implementor reaches the final tab, “Preferred Measures”, the user can select whether they want to make an offer for this specific building.



Preferred Measures

Building Envelope

Insulation

- ✓ Thermal insulation of outer walls and thermal bridges
- ✓ Thermal insulation of roof
- ✓ Thermal insulation of walls

HVAC

Cooling Systems

- ✓ Installation of air conditioning systems

Domestic Hot water (DHW)

- ✓ Installation of DHW storage

Renewable Systems

Photovoltaic Collectors

- ✓ Installation of photovoltaic collectors

Buttons: BACK, NOT INTERESTED, MAKE AN OFFER

Figure 68: Deciding whether to prepare an offer

If the user chooses the **“Make an offer”** option, they are redirected to the first offer form. In this form the Implementor fills in the following information:

Table 13: Offer information

Offer Information
Offer for a walkthrough
Other details
Similar Projects in your Portfolio (PDF)
Energy Efficiency Measures

The above fields are explained in more detail in the table below.

Table 14: Offer information explanation

Fields	Description
Offer for a walkthrough	This refers to the on-site inspection of the building that the Implementor will conduct. During this walkthrough, the Implementor will look at the various building systems such as lighting, HVAC, insulation, and other components to identify opportunities and appropriate energy efficiency/renewable energy measures to propose. The goal of the walkthrough is to enable the Implementor to formulate an accurate offer that can help reduce energy consumption, lower utility costs, and enhance the overall building performance. If the Implementor deems it necessary, a detailed energy audit can be undertaken at this stage, as long as this is agreed prior to the visit with the Building Owner.
Other details	This is a free text field where the Implementor can add any additional information about the company, and their experience and expertise.
Similar Projects in your Portfolio (PDF)	A document or file can be uploaded showcasing similar energy-saving projects undertaken by the entity, providing a reference or comparison point.
Energy Efficiency Measures	In this section, the Implementor chooses from a dropdown list the energy efficiency/renewable energy measures that it covers and thinks need to be implemented in the specific building, based on the preliminary data provided for the building.

Offer

Offer for a walkthrough audit *

ABC Energy Solutions is pleased to offer a comprehensive Walkthrough Energy Audit to help you identify and capitalize on energy-saving opportunities within your facility. Our expert team will conduct an in-depth inspection of all major energy-consuming systems, including HVAC, lighting, and appliances. This audit includes a review of your historical energy bills and operational practices to establish a baseline for energy consumption. We will

Other details

Similar projects in your portfolio



no files uploaded yet

Technology / Type of measure interest

Building Envelope

Insulation

- ☐ Thermal insulation of outer walls and thermal bridges
- ☐ Thermal insulation of walls
- ☐ Thermal insulation of floor
- ☐ Thermal insulation of roof

Windows

- ☐ Replacement of existing windows with EE windows
- ☐ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Doors

- ☐ Replacement of new doors with EE doors

Lighting

Light Replacement

- ☐ Replacement of existing light bulbs with inefficient light sources by new advanced bulbs of better light-technical characteristics and more efficient light

Figure 69: Implementor's initial offer

After filling in the necessary fields, the Implementor can submit their offer for that specific building by selecting the **“Make an offer”** option. After that the user will need to wait for the approval by the Building Owner. If the Building Owner or the Public Body accepts the Implementor's offer, then the building under consideration is moved to the **“Current Projects”** tab. If the Building Owner or the Public Body rejects the Implementor's offer, then this specific building reappears in the **“Matched Buildings”** (Figure 63) tab and then the Implementor can make a new offer if deemed appropriate.

6.4. Current projects & notifications

When clicking on the **“Current Projects”**, the Implementor can view the offers that have been accepted by Building Owners or Public Bodies. This can be seen in Figure 70.

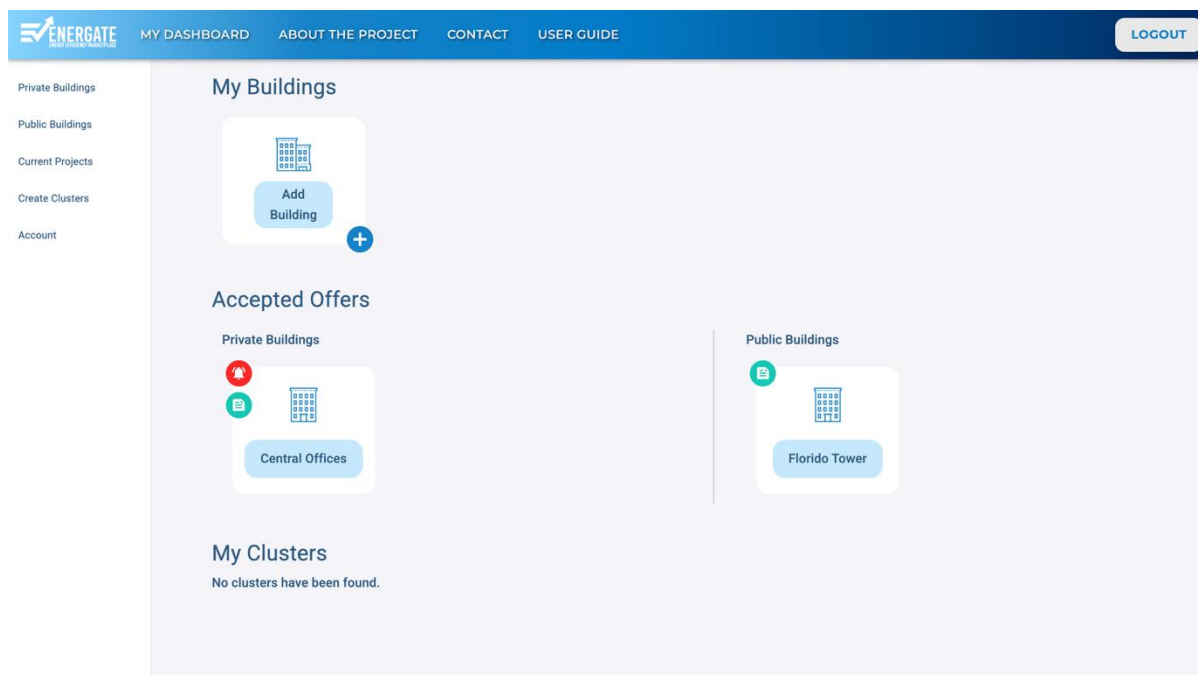


Figure 70: Current Projects

When an offer is first accepted, if this offer concerns an offer that has been made to a Public Body the detailed offer appears by clicking the top left icon at the corresponding Public Building card.

6.5. Offer finalisation

If this offer concerns an offer that has been made to a Building Owner, the Implementor gets a notification to finalise the offer, as can be seen in Figure 71. The final offer (complete and detailed offer) is needed to provide technical details on the proposed interventions, and it is expected to follow the walkthrough to the building. This is a key step to prepare the project for the Financier.

IMPORTANT NOTE: *This is the Final offer made to the Building Owner based on the results of the walkthrough and the interventions the Building Owner is interested in pursuing. The Implementor will not have the opportunity to change the Final offer after submitting it.*

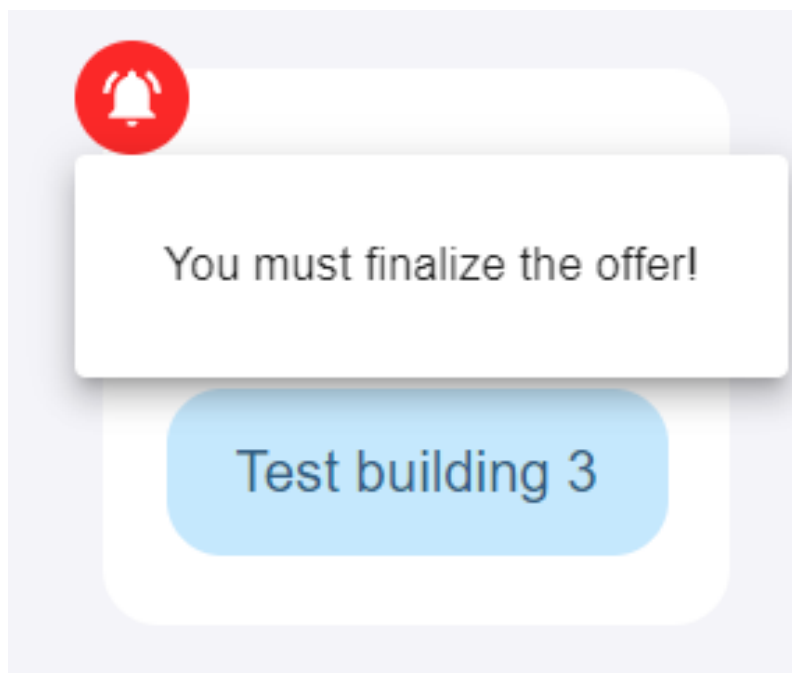


Figure 71: Finalise the offer notification.

By selecting the **“You must finalize the offer”** option, the Implementor is redirected to a new page in order to fill in the necessary information. This information can be seen in detail in the table below:

Table 15: Finalised offer information

Fields	Description	Visible To
Project details for which finance is needed	Free text field where the Implementor can fill in the project details for which finance needs to be provided.	Building Owners, Financiers
Energy Savings Assessment (kWh/year) • Building Envelope • Lighting • HVAC, heat pumps, automation etc. • Photovoltaics	An evaluation of the expected annual energy savings from the project, measured in kilowatt-hours per year, is provided.	Building Owners, Financiers
Estimated CO₂ Abatement (tCO₂/year)	The projected reduction in carbon dioxide emissions as a result of the implementation of the projects, is provided.	Building Owners, Financiers
Measurement and Verification Protocol	(Upload file) The methodology and standards that will be used to verify energy savings and the performance of the project is provided.	Building Owners, Financiers

Fields	Description	Visible To
Energy Class After implementation	The anticipated energy efficiency classification of the building(s) or facility after the project is completed.	Building Owners, Financiers
Reduction in O&M • Building Envelope • Lighting • HVAC, heat pumps, automation etc. • Photovoltaics	The expected decrease in operation and maintenance costs resulting from the implementation of the project.	Financiers
CAPEX • Building Envelope • Lighting • HVAC, heat pumps, automation etc. • Photovoltaics	The capital expenditure required for the implementation of the project.	Financiers
Investment-Upfront payment needed	The initial investment or upfront payment required to start the project.	Building Owners, Financiers
Energy Price (electricity) (€/KWh)	This is the cost per kilowatt-hour for electricity.	Financiers
Energy Price (thermal) (€/KWh)	The cost per kilowatt-hour for thermal energy, (heating).	Financiers
Inflation Rate (%)	The expected annual percentage increase in general prices, impacting future energy costs and savings. This affects the long-term value of cash flows in economic evaluations like NPV or IRR.	Financiers
Discount Rate (%)	The discount rate is used to calculate the present value of future savings. A higher rate reduces the impact of future savings on the current financial analysis.	Financiers
Emission Factor (electricity) (tCO₂/MWh)	This value will help calculate CO ₂ emission reductions from electricity. Lower values indicate cleaner electricity sources and greater environmental benefits.	Financiers
Emission Factor (thermal) (tCO₂/MWh)	This value is used to estimate CO ₂ emission reductions from thermal energy savings, helping assess the environmental impact of the project.	Financiers

Fields	Description	Visible To
Access to subsidies	• Yes (If the Implementor has access to subsidies a new text field opens up to fill in the subsidy name.) • No	Financiers

IMPORTANT NOTE:

- As shown in Figure 72, some fields are mandatory, and others are optional. The mandatory fields have a (*) icon.
- The list at the left presents Energy Efficiency Measures. Depending on the categories of measures the Implementor chooses, the corresponding text fields are enabled, so that the user does not have to fill them all in. Initially the text fields corresponding to energy efficiency/renewable energy measures are all disabled, until a selection is made.

Offer Finalization 1/2

Technology / Type of measure interest

Building Envelope

Insulation

- ☒ Thermal insulation of outer walls and thermal bridges
- ☒ Thermal insulation of walls
- ☐ Thermal insulation of floor
- ☐ Thermal insulation of roof

Windows

- ☐ Replacement of existing windows with EE windows
- ☐ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing

Doors

- ☐ Replacement of new doors with EE doors

Lighting

Light Replacement

- ☐ Replacement of existing light bulbs with inefficient light sources by new advanced bulbs of better light-technical characteristics and more efficient light sources
- ☐ Application of manual dimmers

Control / Automation

- ☐ Application of light management systems, with the integrated ability to adjust to daylight (daylight sensor integrated)
- ☐ Application of presence detectors

Automation

Supervision / Management / Control

- ☐ Energy Management System (meters, network)
- ☐ Installation of monitoring and visualisation systems for energy and water consumption
- ☐ Installation of supervision, management and control systems for individual control
- ☐ Installation of systems for supervision, management and regulation of peak loads

HVAC

Heating System Upload your measurement and verification protocol.

- ☐ Installation of thermostatic radiator valves
- ☐ Installation of electronic wireless thermostatic radiator valves with controllers or programmable thermostatic heads
- ☐ Installation of manual balance or overflow valve
- ☐ Thermal insulation of uninsulated pipes and valves

Domestic Hot water (DHW)

- ☐ Installation of equipment for water heating
- ☐ Replacement of equipment for water heating
- ☐ Installation of flow regulators
- ☐ Installation of DHW storage

Project's details for which finance is needed

Pipeline size

Country
Italy

Province / Region
1

Cimate Zone
1

Energy Savings Assessment

Building Envelope

Electricity savings *
1 KWh/year

Thermal savings *
1 KWh/year

Lighting

Electricity savings * KWh/year

Heating,Ventilation and Air Conditioning, Heat Pumps, Automation etc

Electricity savings * KWh/year

Thermal savings * KWh/year

Photovoltaic

Renewable energy production * KWh/year

Total (Electricity) *
1 KWh/year

Total (Thermal) *
1 KWh/year

Estimated CO2 Abatement *
1 tCO₂/year

Upload Measurement & Verification Protocol *

 Upload or drop a file right here PDF

no files uploaded yet

Energy Class after Implementation *

Reduction in operation and maintenance costs

Reduction for building envelope * €

Reduction for lighting * €

Reduction for HVAC, etc * €

Reduction for photovoltaic * €

CAPEX

Capex for building envelope * €

Capex for lighting * €

Capex for HVAC/ etc. * €

Capex for photovoltaic * €

Investment - Upfront Payment Needed * %

Energy Price (Electricity) (€) *
0.2031 €/KWh 

Energy Price (Thermal) (€) *
0.0884 €/KWh 

Inflation Rate *
1.9 % 

Discount Rate *
%

Emission Factor (Electricity) *
0.284 tCO₂/MWh 

Emission Factor (Thermal) *
tCO₂/MWh 

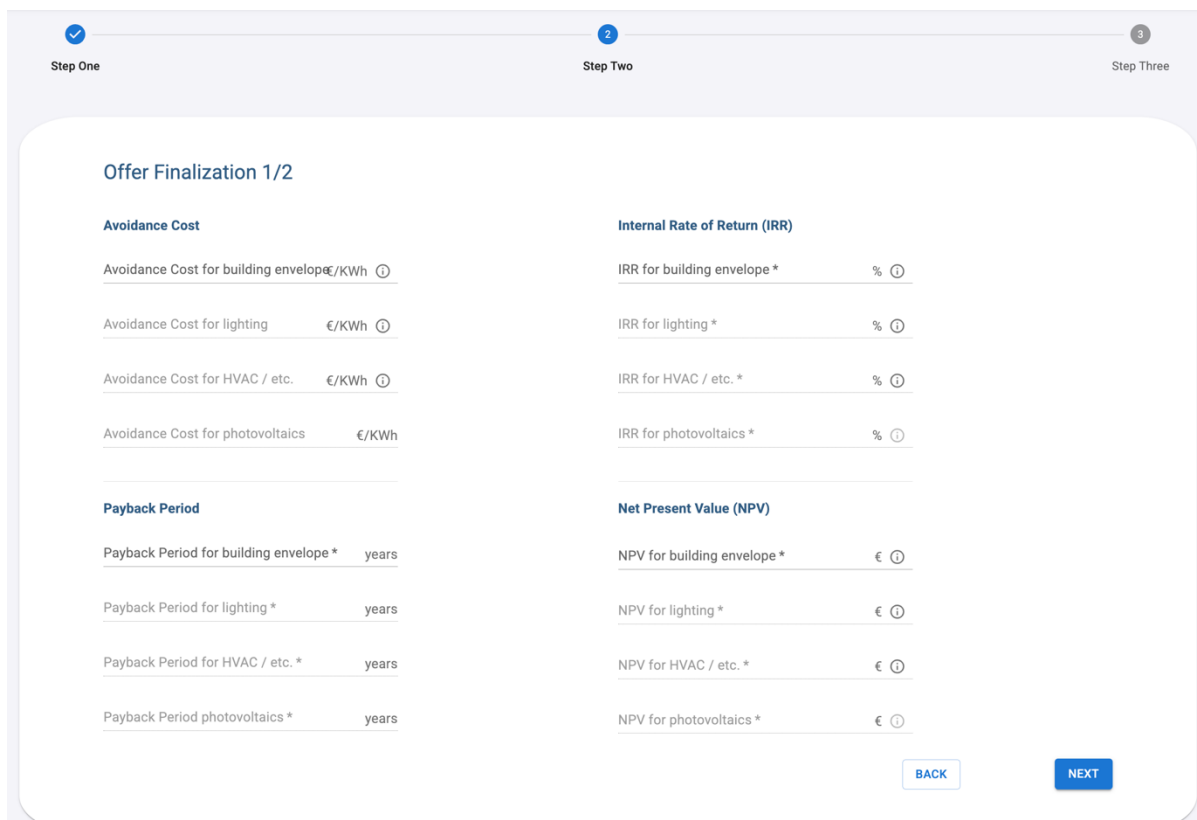
Access to subsidies

☐ Yes

☒ No

Figure 72: Offer finalisation step 1

In step 2, the Implementor has to fill in some key economic indicators of the renovation offer. Each text field comes with a placeholder value that is automatically calculated from the data entered in Step 1. Users can keep these suggested values or overwrite them with more precise figures if available.



Offer Finalization 1/2

Avoidance Cost

Avoidance Cost for building envelope €/KWh ⓘ

Avoidance Cost for lighting €/KWh ⓘ

Avoidance Cost for HVAC / etc. €/KWh ⓘ

Avoidance Cost for photovoltaics €/KWh ⓘ

Payback Period

Payback Period for building envelope * years

Payback Period for lighting * years

Payback Period for HVAC / etc. * years

Payback Period photovoltaics * years

Internal Rate of Return (IRR)

IRR for building envelope * % ⓘ

IRR for lighting * % ⓘ

IRR for HVAC / etc. * % ⓘ

IRR for photovoltaics * % ⓘ

Net Present Value (NPV)

NPV for building envelope * € ⓘ

NPV for lighting * € ⓘ

NPV for HVAC / etc. * € ⓘ

NPV for photovoltaics * € ⓘ

BACK **NEXT**

Figure 73: Finalised offer step 2

Table 16: Finalised offer step two information

Fields	Description	Visible To
Avoidance Cost - Building Envelope - Lighting - HVAC, heat pumps, automation etc. - Photovoltaics	The costs that will be avoided due to the implementation of the energy-saving project (economic savings due to the implementation of the measures).	Financiers
Payback Period (years) - Building Envelope - Lighting - HVAC, heat pumps, automation etc. - Photovoltaics	The time it will take for the cost savings of the project to cover the initial investment costs.	Building Owners, Financiers

Fields	Description	Visible To
IRR • Building Envelope • Lighting • HVAC, pumps, automation etc. • Photovoltaics	The internal rate of return for the project, indicating the profitability of the investment.	Financiers
NPV • Building Envelope • Lighting • HVAC, pumps, automation etc. • Photovoltaics	The net present value of the project, representing the difference between the present value of cash inflows and outflows over the project's lifetime.	Financiers

Step One

Step Two

Step Three

Offer Finalization 1/2

Avoidance Cost

Internal Rate of Return (IRR)

Avoidance Cost for building envelope €/KWh

Avoidance Cost for lighting €/KWh

Avoidance Cost for HVAC / etc. €/KWh

Avoidance Cost for photovoltaics

Count 11,016

Unique 10,935

Mode (Top) 660.34 €/KWh

Mode Frequency 10

This dataset does not include percentiles, so we show descriptive stats instead of a boxplot.

CLOSE

Payback Period

Payback Period for building envelope * years

Payback Period for lighting * years

Payback Period for HVAC / etc. * years

Payback Period photovoltaics * years

NPV for building envelope * €

NPV for lighting * €

NPV for HVAC / etc. * €

NPV for photovoltaics * €

BACK

NEXT

Figure 74: Avoidance Cost Benchmarking

When the user clicks the info icon next to an **Avoidance Cost** field, a pop-up shows **benchmark statistics** from the DEEP database³. These values provide context for the selected category (e.g., *Building Envelope*, *Lighting*, *HVAC*).

Displayed values:

- **Count** – total number of projects in the dataset (higher = stronger basis).
- **Unique** – number of distinct values (shows variation).
- **Mode (Top)** – most frequent value in €/kWh (a typical reference).
- **Mode Frequency** – how many projects share that top value.

Since Avoidance Cost lacks percentile data, only descriptive statistics are shown in table form.

Usage:

The user enters an estimate, clicks the icon, and compares it against the *Mode (Top)* and overall dataset. If the estimate is close to the Mode, it aligns with common practice; if not, the user should review project assumptions. The dialog can be closed once reviewed.

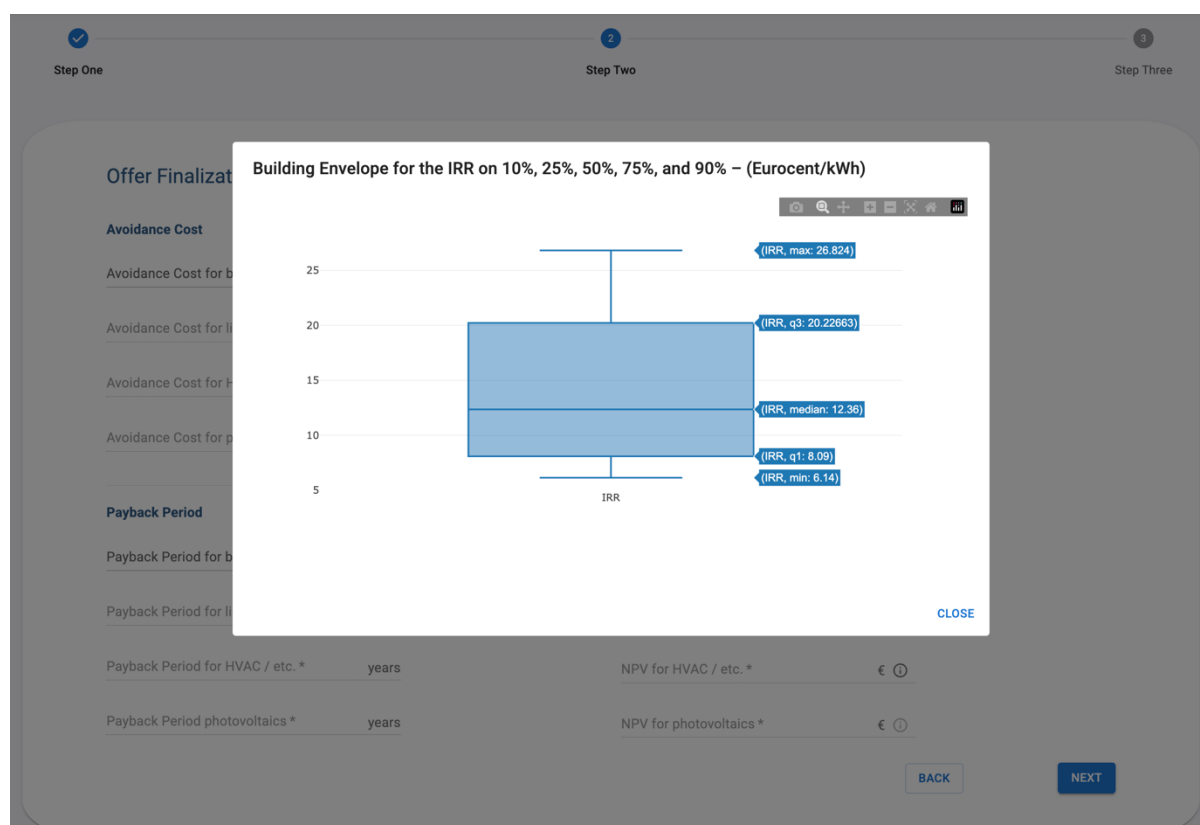


Figure 75: IRR Benchmarking

When the user clicks the info icon next to an **IRR** or **NPV** field, a pop-up shows a **box plot** with benchmark statistics from the DEEP database. These percentiles provide context for the selected category (e.g., *Building Envelope*, *Lighting*, *HVAC*).

Displayed values:

³ <https://deep.ec.europa.eu/>

- **Min / Max** – lowest and highest observed project values.
- **Q1 (25%) / Q3 (75%)** – middle range where half of projects fall.
- **Median (50%)** – the central value; half of projects are above and half below.

The box plot shows the distribution, making it easy to see whether the user's estimate falls within the typical range (between Q1 and Q3) or is closer to the extremes.

Usage:

The user enters an estimate, clicks the icon, and compares it with the distribution.

- If the estimate is near the **median**, it aligns with common outcomes.
- If it is outside the **Q1–Q3 range**, it may indicate unusual assumptions or project conditions.

The dialog can be closed once reviewed.

In step 3, the Implementor has to fill in the final details in order to complete the submission of the offer, as shown in the table below. This information is available to both Building Owners and Financiers.

Table 17: Final offer details

Final Offer Details	Options
Final offer of the project	User-defined
Type of contract proposed	☐ Power Purchase Agreement ☐ As a Service ☐ Energy Performance Contract ☐ Operating Lease ☐ Other
Upload Certificate, Insurance, Construction Permit (optional), Energy Audit	Upload file
Stage of the project	☐ Implementation ☐ Operational ☐ Incipient/Design
Construction Finance	☐ Bridge Loan ☐ Own Funds ☐ Other
Contribution by End Client (%)	User-defined

The tables below present information about the type of contracts proposed, the construction financing options and the remaining fields as well.

Table 18: Type of contracts

Type of contract options	Description
Power Purchase Agreement	Contract where a power producer sells electricity to a consumer at a fixed price over time.
As a Service	Business model where services are provided on a subscription or pay-per-use basis.
Energy Performance Contract (EPC)	Agreement where an energy service company implements energy-saving measures in a client's facilities, recouping costs through savings.
Operating Lease	Lease where the lessee uses an asset for a period, with the lessor retaining ownership and responsibility for maintenance.

Table 19: Construction Finance options

Construction options	Financing	Description
Bridge Loan		Short-term financing used to bridge the gap between the purchase of a new property and the sale of an existing one, or to cover costs during the construction phase of a project.
Own Funds		Funds provided by the project owner or developer, typically from their own resources or investments, to finance construction or development without external borrowing.

Table 20: Offer finalisation fields explanation

Fields	Description
Upload Certificate, Insurance, Construction Permit (optional), Energy Audit	In this section relevant documents such as certificates, insurance policies, construction permits, and energy audits can be uploaded.
Contribution by End Client (%)	This field refers to the percentage of the total project or investment cost that is being paid directly by the client or end user, rather than being covered by subsidies, grants, or other external funding. This indicates how much of the cost the client is responsible for contributing from their own resources.

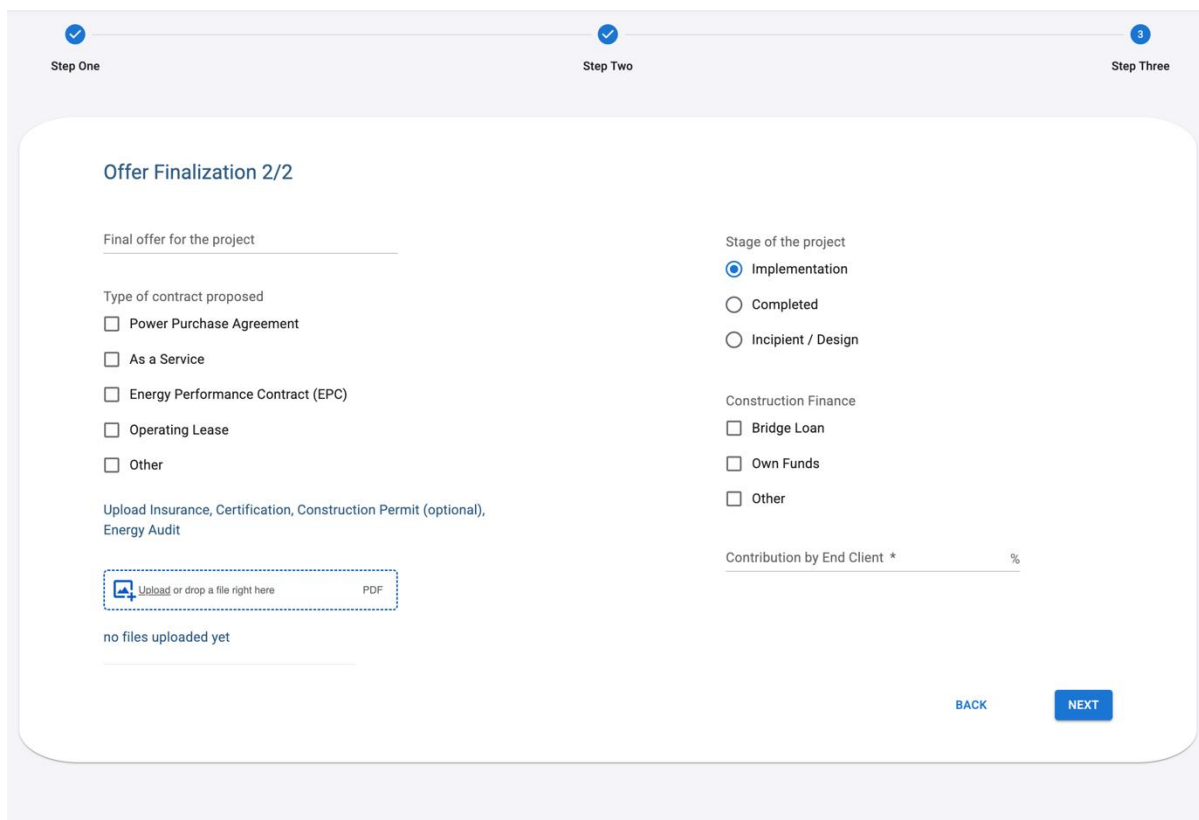


Figure 76: Offer finalisation step three

At the end of the page, the Implementor can send their offer.

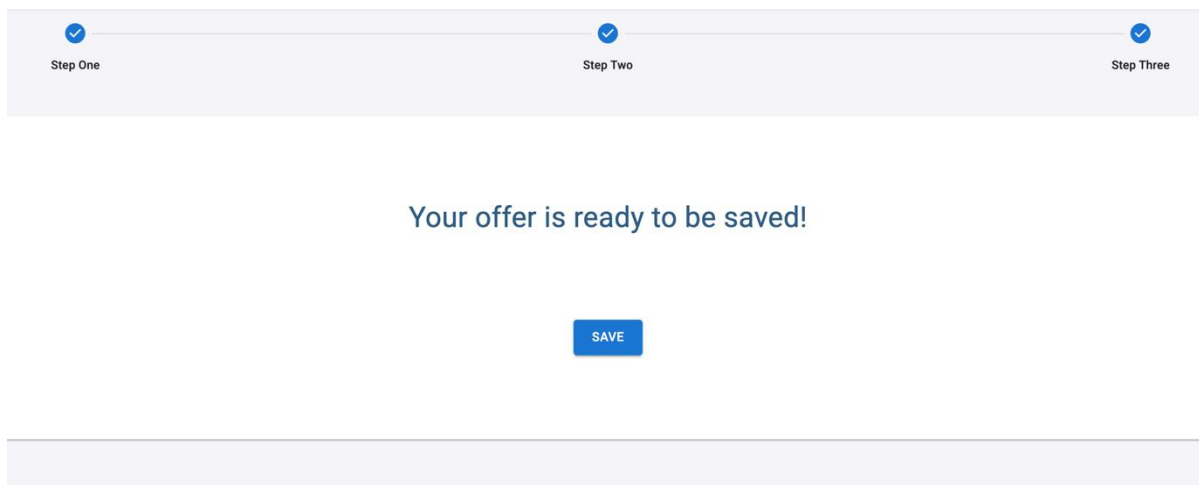


Figure 77: Sent offer

After the offer is finalised, the project is eligible to be presented to Financiers and receive term sheets from them. When receiving a term sheet from a Financier, a notification is shown at the top left corner.

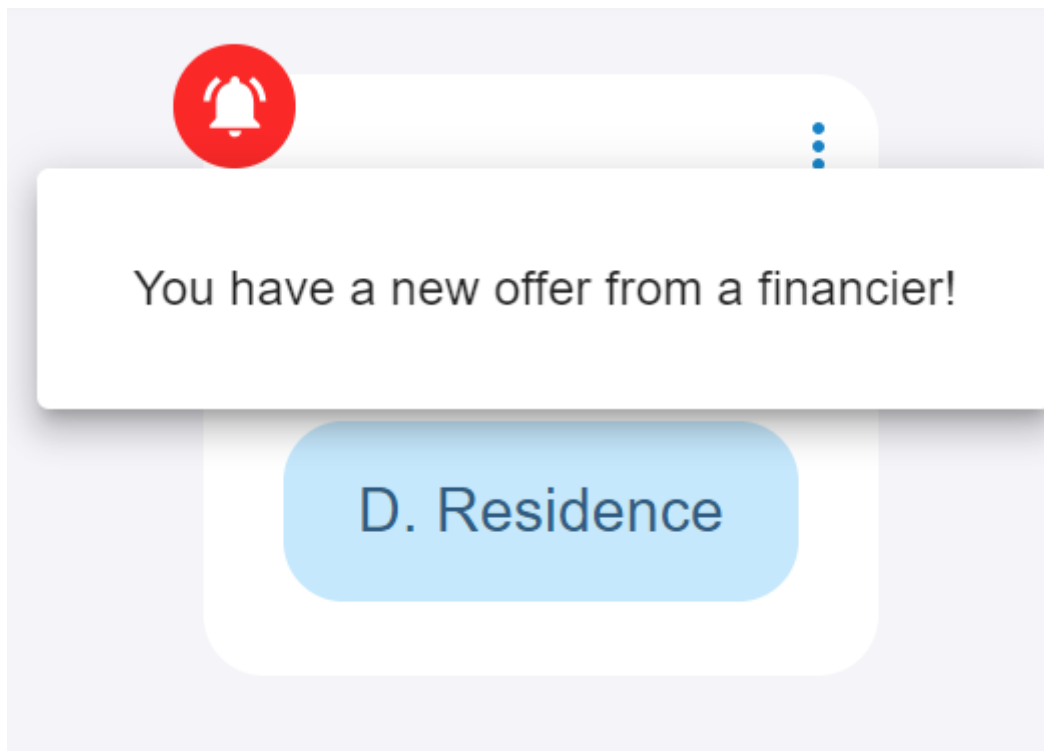


Figure 78: Financier term sheet notification

After clicking on the notification, the Implementor can download and view the term sheet provided by the Financier and accept or decline it.

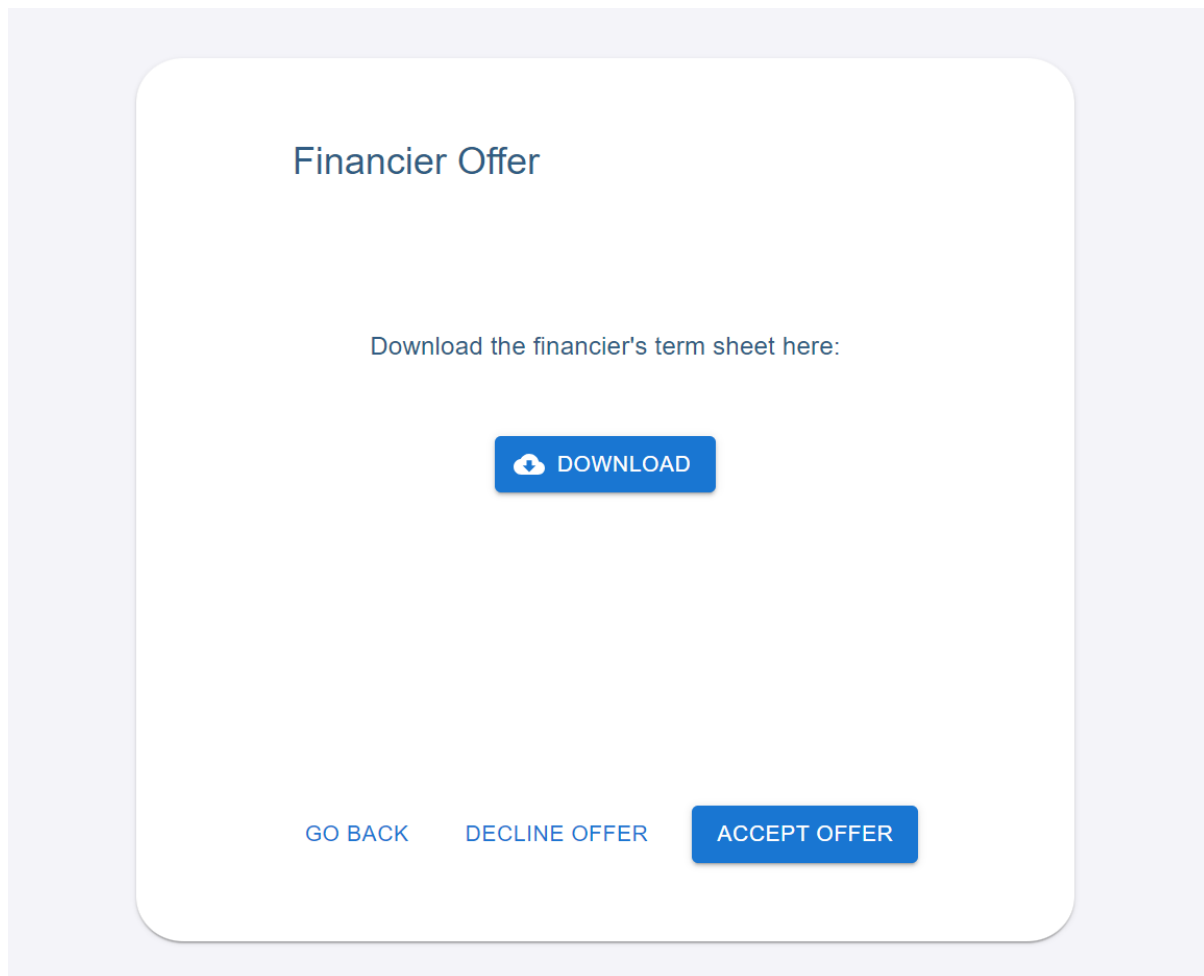


Figure 79: Financier term sheet.

The term sheet, along with the offer submitted and the building details can be viewed by clicking on the green icon on the top left corner of each building card.

BUILDING INFORMATION
FINAL OFFER
ECONOMIC INDICATORS
TERM SHEET

Building Information

Company Name
test_bo

Description
The Greenfield Office Tower is a 12-story

Building Typology
Commercial Building

Construction Year
2010

Building Area
200

Number of Floors
2

Occupancy Levels
2

Heating Type Installed
AC

Cooling Type Installed
AC

Annual Electricity Consumption (kWh)
100

Annual Heating Consumption (kWh)
100

Annual Cooling Consumption (kWh)
100

Desired Building Financing

☐ As a Service
☒ Enerfy Performance Contract (EPC)
☐ On-Bill
☐ Bank Loan
☐ Operating Lease
☒ Applying for subsidies

GO BACK

Figure 80: Building details

Along with the building details, the Implementor can also see the final offer, some economic indicators that are being calculated through the platform and the term sheet if a Financier has uploaded one.

1
Step One

Offer Finalization 1/2

Technology / Type of measure interest

Building Envelope

Insulation

- ✓ Thermal insulation of outer walls and thermal bridges
- ✓ Thermal insulation of walls

2
Step Two

Project's details for which finance is needed

Pipeline size

Country

Greece

Province / Region

Athens

Climate Zone

Energy Savings Assessment (kwh/year)

Building Envelope

Electricity savings *

9000

Thermal savings *

1000

Lighting

Heating, Ventilation and Air Conditioning, Heat Pumps, Automation etc

Photovoltaic

Total (Electricity) *

9000

Total (Thermal) *

1000

Estimated CO2 Abatement (%) *

10

Measurement & Verification Protocol

[DOWNLOAD](#)

Energy Class after Implementation *

A

Reduction in operation and maintenance costs

Reduction for building envelope (€) *

500

CAPEX

Capex for building envelope (€) *

90000

Investment - Upfront Payment Needed (€)

1000

Avoidance Cost

Avoidance Cost for building envelope (€)

1

Payback Period (years)

Payback Period for building envelope *

1

Internal Rate of Return (IRR)

IRR for building envelope *

1

Net Present Value (NPV)

NPV for building envelope *

1

Energy Price (Electricity) (€) *

1

Energy Price (Thermal) (€) *

1

Inflation Rate *

0.03 i

Discount Rate *

0.08 i

Emission Factor (Electricity) *

1 i

Emission Factor (Thermal) *

1 i

[NEXT](#)

Figure 81: Final offer

As far as economic indicators are concerned, the platform calculates the following indicators, based on the Implementor's input. The calculations help the Implementor cross check the indicators that have been added in the finalised offer.

Table 21: Economic indicators

Economic Indicators & Other Values	Description
Cost Savings (€/year)	This represents the annual amount of money saved due to the implementation of energy-efficient measures.
Internal Rate of Return (IRR) (%)	IRR is a financial metric used to evaluate the profitability of an investment. It represents the annualized rate of return generated by the energy efficiency project over its lifetime, calculated as the discount rate at which the Net Present Value (NPV) of the project equals zero.
Payback Time (years)	This is the amount of time required for the cost savings generated by the energy efficiency project to equal the initial investment (CAPEX). It indicates how quickly the project will recover its costs.
Net Present Value (€)	NPV is the difference between the present value of cash inflows (such as cost savings) and the present value of cash outflows (such as investment costs) over the project's lifetime. A positive NPV indicates that the project is expected to generate more value than it costs.
Avoidance Cost (€/kWh)	This metric represents the cost avoided by implementing energy-efficient measures, such as avoiding future expenses related to energy price increases, equipment maintenance, or environmental compliance penalties.
Total Energy Savings (kWh/yr)	This quantifies the total reduction in energy consumption as a result of the implemented measures, often expressed in kilowatt-hours (kWh) or other relevant units. It reflects the overall efficiency gains from the project. This value expresses the total energy savings annually.
CO₂ Savings (tCO₂/kWh)	CO ₂ Savings measures the reduction in carbon dioxide emissions due to energy-saving actions. It is expressed in metric tons of CO ₂ per kilowatt-hours (kWh) and reflects the environmental impact of the project in terms of reduced greenhouse gas emissions. This value expresses the CO ₂ Savings on an annual basis.
Total CAPEX (€)	Total Capital Expenditure (CAPEX) refers to the initial investment costs required to implement the energy efficiency project. It includes all costs associated with purchasing, installing, and commissioning equipment and technologies.

BUILDING INFORMATION FINAL OFFER <u>ECONOMIC INDICATORS</u> TERM SHEET					
Explore the economic performance of energy efficiency measures across various building systems. Compare metrics such as cost savings, IRR, payback time, and CO ₂ reductions, along with total CAPEX and energy savings, to evaluate the impact of these initiatives.					
Energy Efficiency measures	Cost savings (€/year)	Internal Rate of Return	Payback Time (Years)	Net Present Value (€)	Avoidance Cost (€/KWh)
Building Envelope	320.0	-0.9%	41.7	-28936.0	10.0
	140.0				
Lighting	0.0	0.0%	0.0	0.0	0.0
Heating,Ventilation,Air Conditioning Heat Pumps, Automation etc	0.0	0.0%	0.0	0.0	0.0
	0				
Photovoltaics	0.0	0.0%	0.0	0.0	0.0

Total energy savings (KWh/year)	CO ₂ savings (tCO ₂ /KWh)	Total CAPEX (€)
4000	1.4	40000

Figure 82: Economic indicators

BUILDING INFORMATION	INITIAL OFFER	FINAL OFFER	<u>ECONOMIC INDICATORS</u>	TERM SHEET
----------------------	---------------	-------------	----------------------------	------------

Financier Offer

The financier has not uploaded a term sheet yet.

[BACK](#)
[GO BACK](#)

Figure 83: Financier proposal

6.6. Adding a building

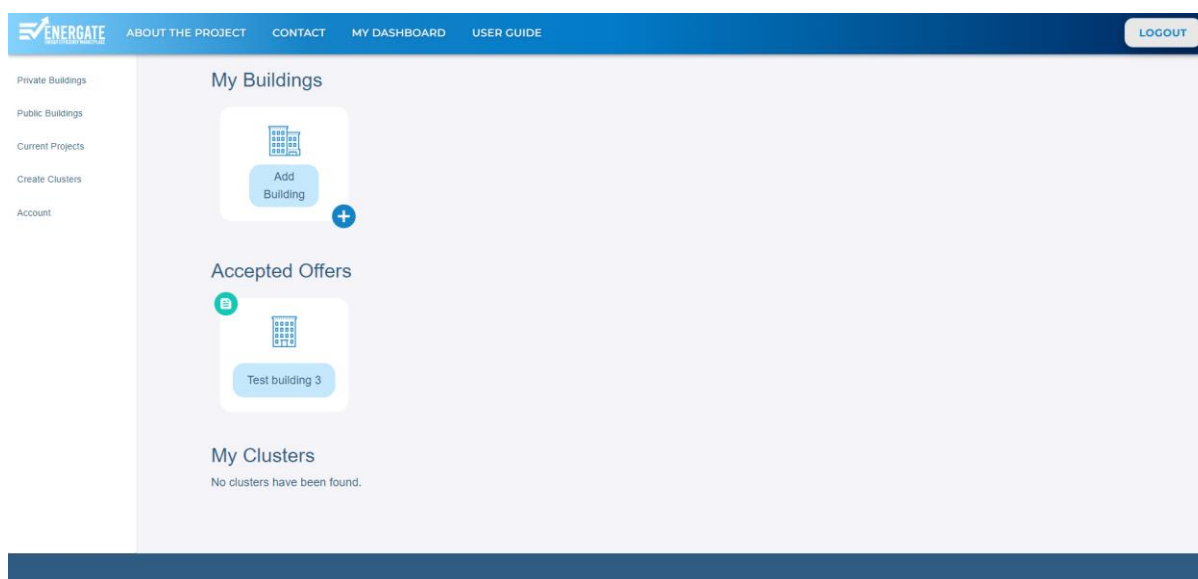


Figure 84: Implementor's current projects

On the “**Current Projects**” tab of an Implementor, besides checking accepted offers, the user can also add a new building directly in the platform. To add a new building, the user needs to select the add icon at the bottom right of the “**Add building**” card. After that, the user will be redirected to a page with six different tabs. The user is requested to fill in the necessary information about the building along with the finalised offer, to enable the building to be matched with Financiers. Since the building information is identical to that of the Building Owner and the final offer was detailed in the previous **sub-section 6.5** the process of adding a building will not be repeated again.

6.7. Project Aggregation

The user can navigate to the “**Create Clusters**” tab to view their own buildings and those of Building Owners that have accepted the Implementor’s offer and aggregate them into clusters. This process will enable similar projects to be grouped together and be presented as a new, more attractive project for Financiers. When first navigating into this tab, the user is presented with building icons that can be checked and added into the cluster.

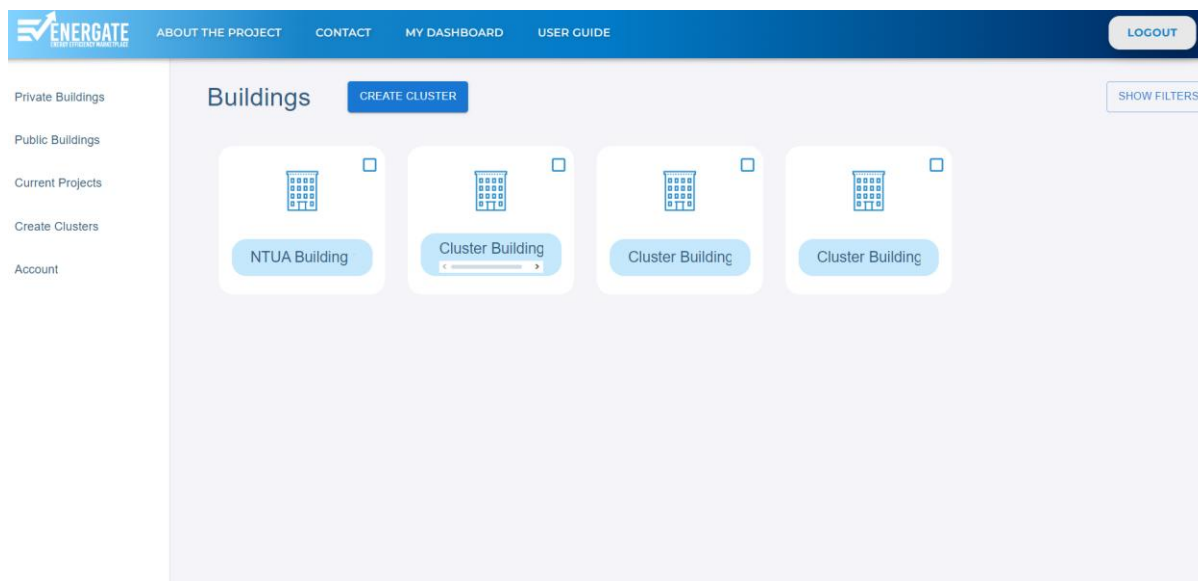


Figure 85: Cluster creation dashboard

In order to assist Implementors with the aggregation process, there are filters they can select to group buildings based on similarities. These filters divide buildings into groups that have selected attributes in common. For example, if the “Same Building Owner” and “Same Country” filters are selected, the buildings are grouped based on their owner and country, as shown in Figure 87: Grouped buildings.

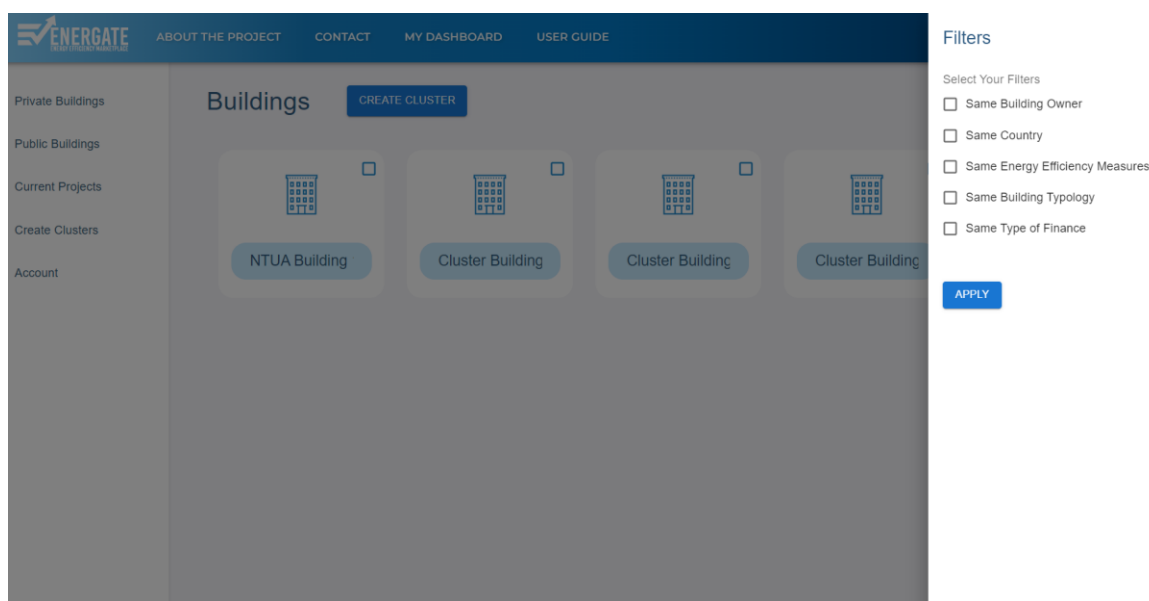


Figure 86: Clustering filters

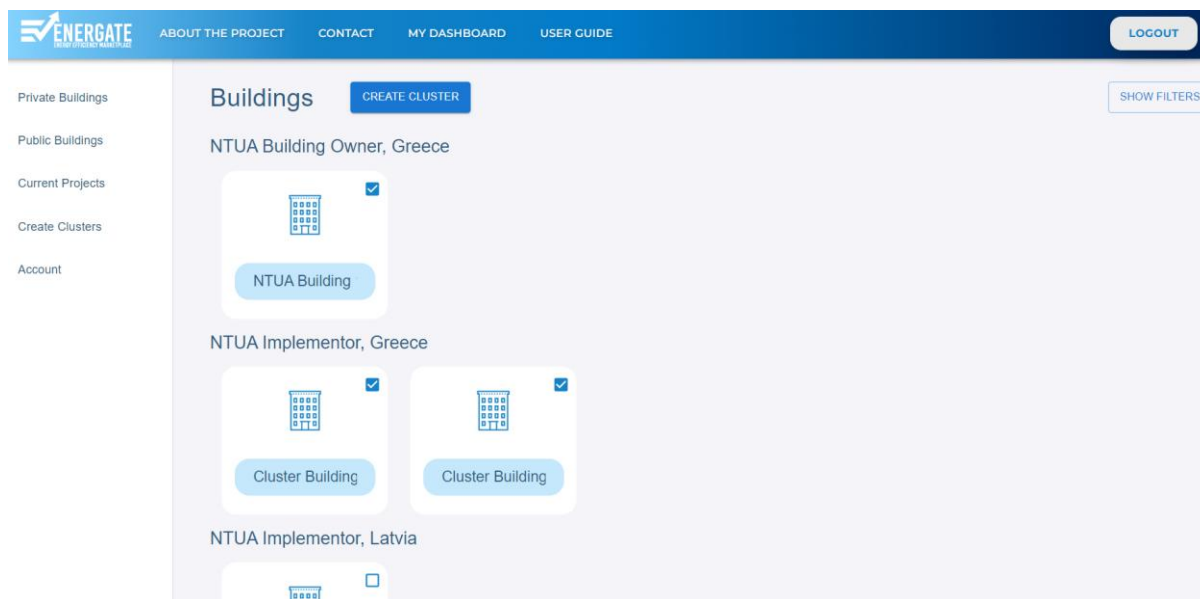


Figure 87: Grouped buildings

After the Implementor has decided on which buildings should be grouped together, the user can click on the respective checkboxes and click on the button **“Create Cluster”**. After a cluster has been created, the user can view it at the **“Current Projects”** tab. By clicking on the three dots, the user can delete the cluster, while by clicking on the cluster, a pop-up opens where the cluster’s buildings information can be viewed and processed.

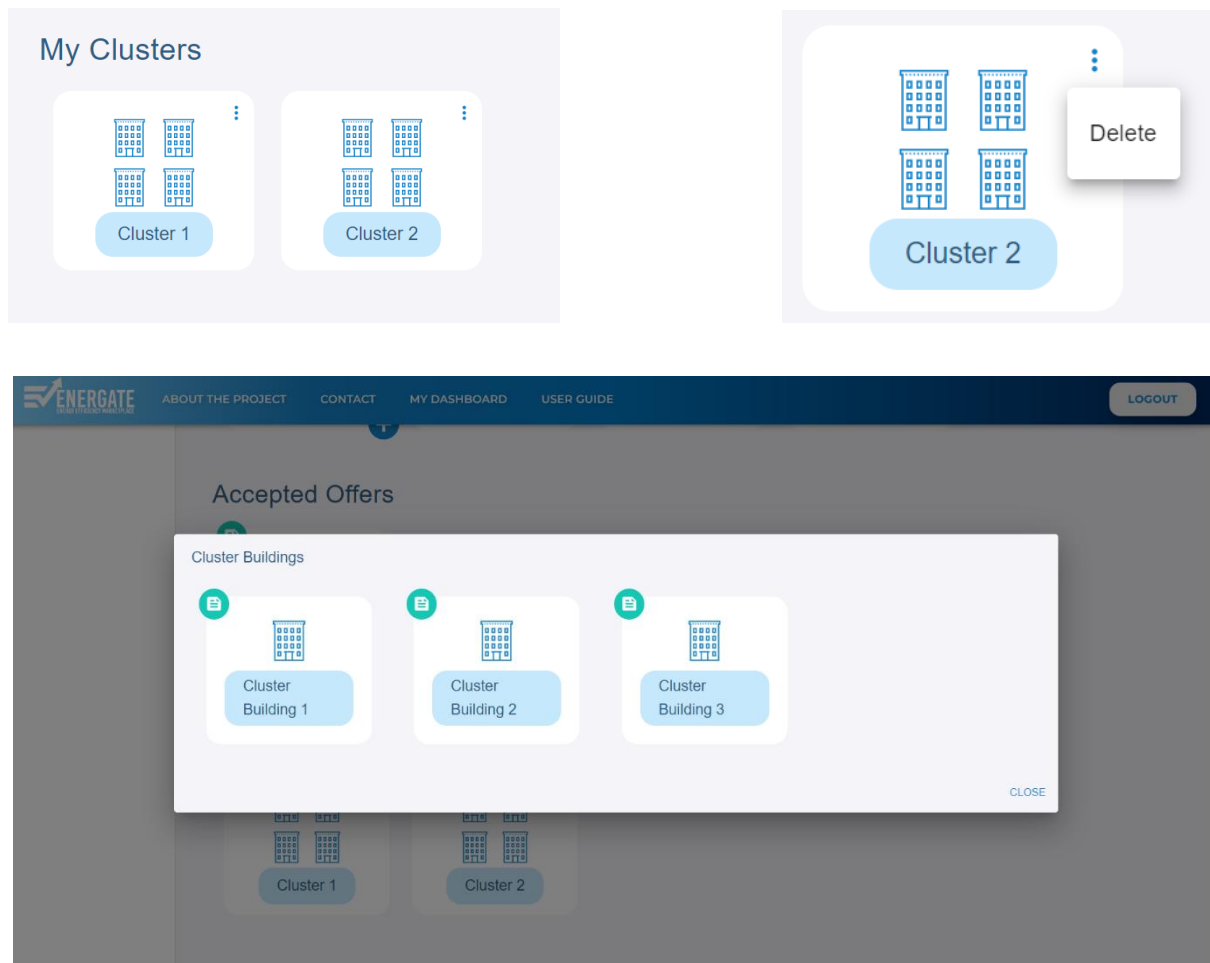


Figure 88: Cluster deleting & viewing options

6.8. Implementor's account information

From the “**Account**” option at the left-side navigation bar, an Implementor can check their account information and update them when necessary.

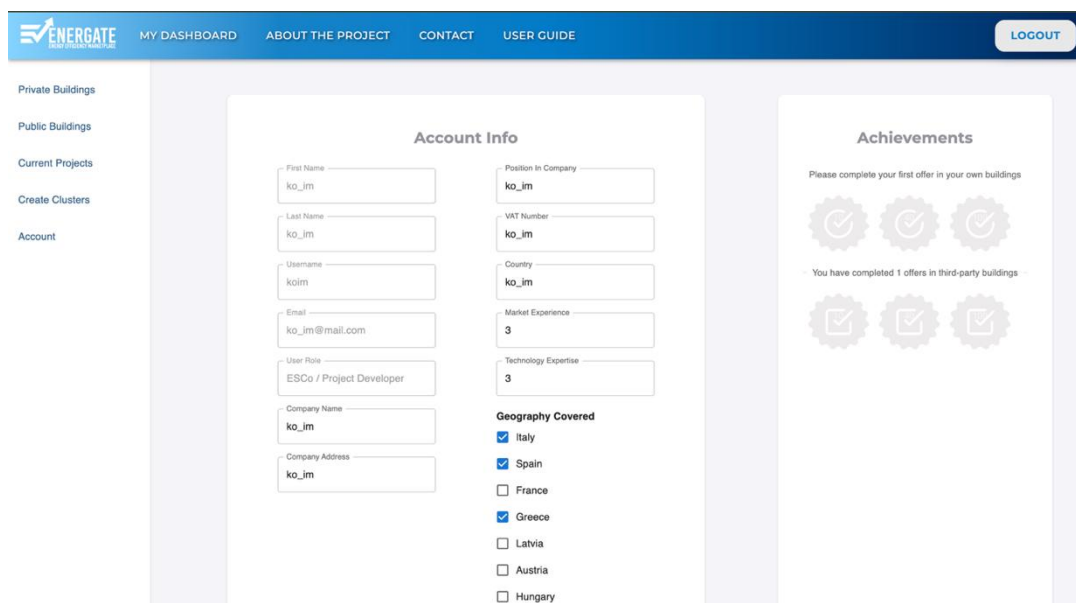


Figure 89: Implementor's account information

Along with their account information, users can also see the badges they have earned by completing one of the following achievements:

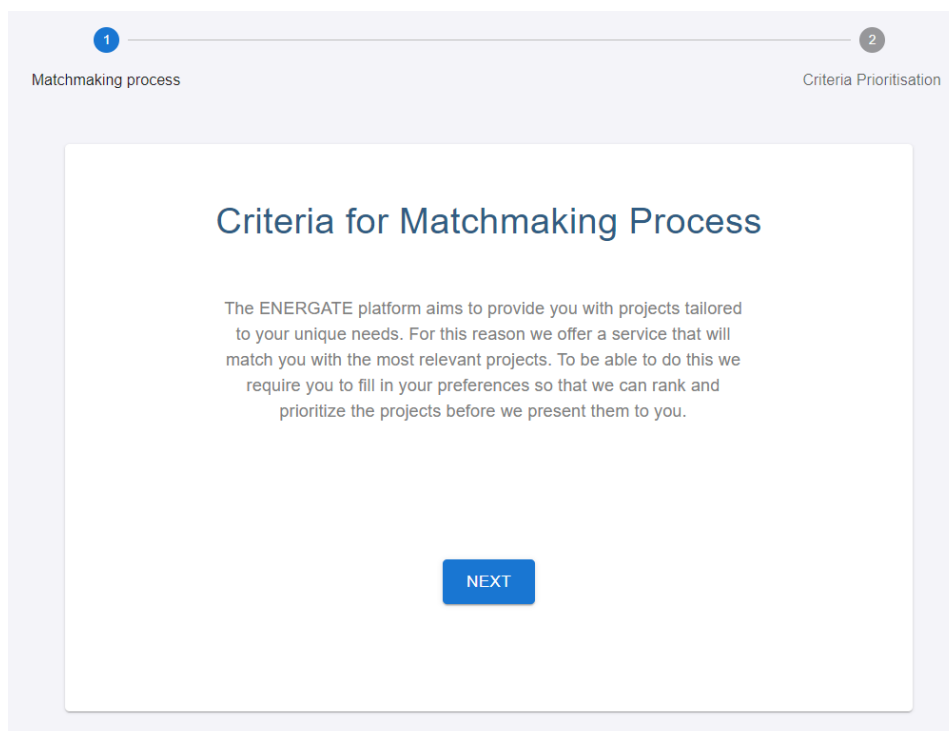
Table 22: Type of achievements for Implementors

Badges/Information	Description
Total Offers Made (Implementor's Buildings)	As the Implementor makes new offers for their own buildings' badges will be awarded based on their total number of buildings: • 10 offers • 40 offers • 100 offers
Total Offers Made (Building Owner's Buildings)	Implementors receive badges based on the number of offers they make with third-party buildings: • 10 offers • 40 offers • 100 offers
Offer acceptance rate (%)	The Implementor is shown a notification reflecting their acceptance rate as a performance indicator.

7. Financier

7.1. Adding project selection criteria

After logging in for the first time, the user is requested to specify the importance of specific criteria that will be used in the matchmaking process. These criteria will be used to rank the matched projects, so that the most suitable ones, that the user is most likely to be interested in, will appear at the top.



1 Matchmaking process 2 Criteria Prioritisation

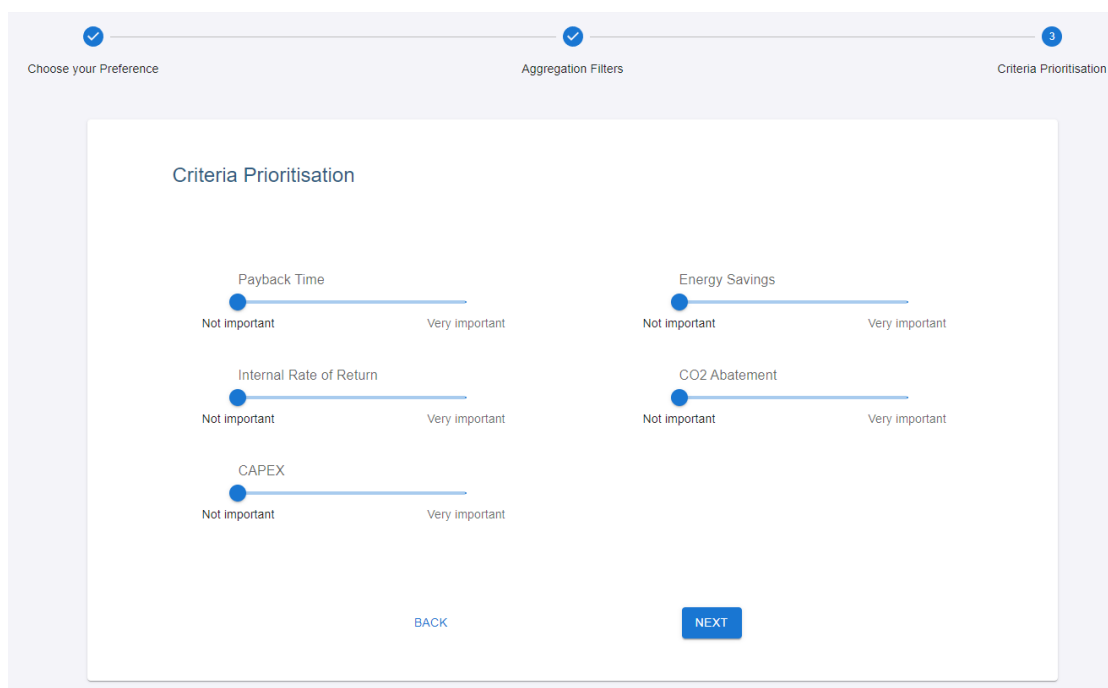
Criteria for Matchmaking Process

The ENERGATE platform aims to provide you with projects tailored to your unique needs. For this reason we offer a service that will match you with the most relevant projects. To be able to do this we require you to fill in your preferences so that we can rank and prioritize the projects before we present them to you.

NEXT

Figure 90: Matchmaking criteria

By clicking “**Next**”, the user then proceeds to specify the interest levels in the provided criteria to define how the projects will be prioritised. The ranking process includes an MCDM method where TOPSIS is used to calculate a score for each project, depending on the weights given on the criteria. This way, it is ensured that the most attractive projects, according to the Financier’s preferences, are selected.



The interface shows a three-step process: 1. Choose your Preference, 2. Aggregation Filters, and 3. Criteria Prioritisation. The 'Criteria Prioritisation' step is active. It contains five sliders for different criteria, each ranging from 'Not important' to 'Very important':

- Payback Time:** Slider is positioned towards 'Not important'.
- Energy Savings:** Slider is positioned towards 'Very important'.
- Internal Rate of Return:** Slider is positioned towards 'Not important'.
- CO2 Abatement:** Slider is positioned towards 'Not important'.
- CAPEX:** Slider is positioned towards 'Not important'.

At the bottom, there are 'BACK' and 'NEXT' buttons.

Figure 91: Criteria prioritisation filters

7.2. Exploring matched projects

The Financier's main dashboard presents the available projects in need of financing. It also contains two buttons. The **"Change Prioritization Criteria"** button and the **"Show Filters"** button. Thus, the user can change the mentioned criteria any time by clicking on the **"Change Prioritization Criteria"** blue button on the top center of the page. The user is then directed to the previous page (Figure 91) to repeat the process. By selecting the **"Show Filters"** button, the Financier can apply filters to search for specific projects.

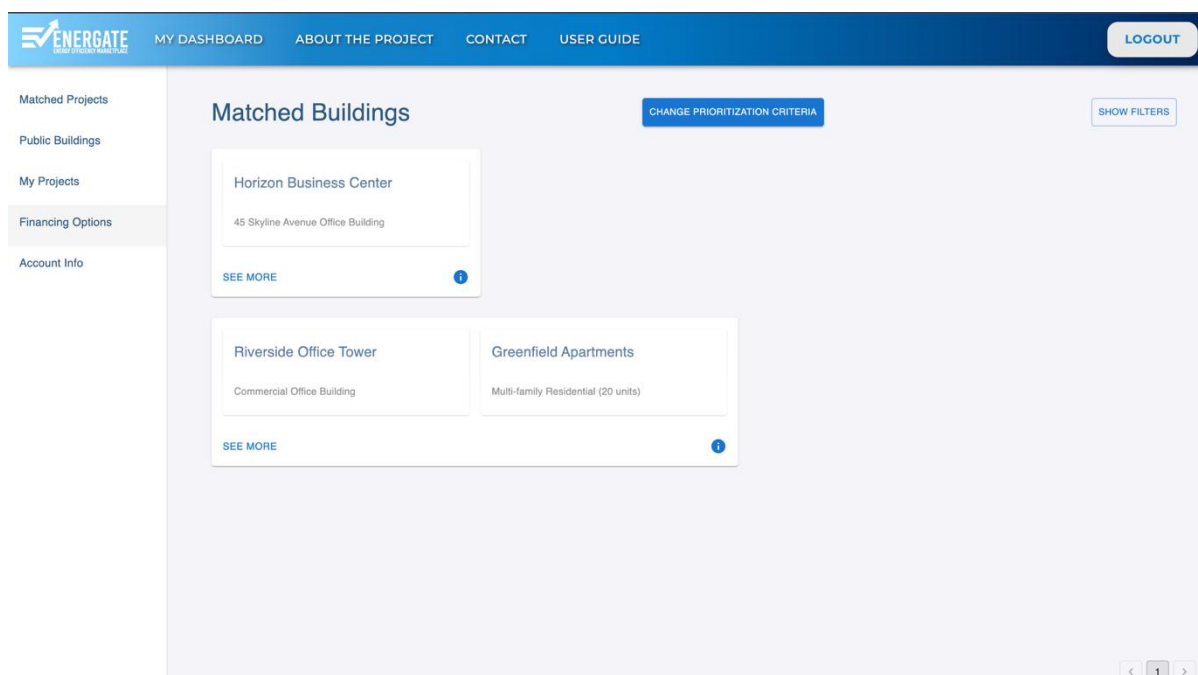


Figure 92: Financier Main Dashboard

The different filters incorporated in the platform are listed below:

Table 23: Searching filters

Filters	Options
Country	• Greece • Italy • Spain • Latvia • France • Austria • Hungary
Financing Type	• As a Service • EPC • Operating Lease • Power Purchase Agreement • Other
Building Typology	• Commercial Building • Municipal Building • Industrial Building • Factory/Manufacturing • Office Space • Residential • Shard Space • Accommodation/Hotel • Spa Resort

Filters	Options
	• Education Facility • Healthcare Facility • Sport Facility • Other
Energy Efficiency Measures	• Building Envelope • Lighting • Automation • Heating, Ventilation and Cooling • Renewable Systems
Minimum IRR (%)	User-defined
Maximum Payback Time (years)	User-defined
Minimum Project Size (€)	User-defined
Maximum Investment (%)	User-defined
Subsidies	Any/Yes/No

Filters

☒ Shared Space
☒ Accommodation / Hotel
☒ Spa Resort
☒ Education Facility
☒ Healthcare Facility
☒ Sport Facility
☒ Other

Energy Efficiency Measures

☒ Building Envelope
☒ Lighting
☒ Automation
☒ HVAC
☒ Renewable Systems

Minimum IRR

% 1

Max Payback Time

years 1000

Minimum Project Size

€ 100

Maximum Investment

% 100

Subsidies

yes

APPLY

Figure 93: Searching Filters

The user has the option to view useful information about the cluster by clicking on the blue **Info** icon button on the lower right side of the card. The information presented includes: the investment potential, which is represented by three classes from best to worst (A, B, C) and the likelihood of belonging to each class, the pipeline size, and for each category of energy efficiency measures to be implemented, the CAPEX, energy savings, payback time and IRR. More information about the investment potential and how it is calculated and integrated from MATRYCS can be found [here](#)⁴. The information is depicted in Figure 95

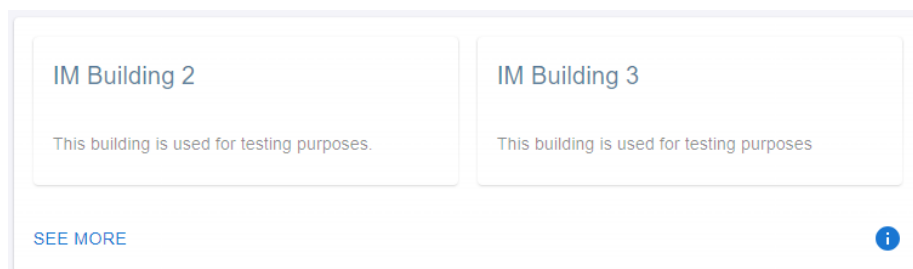


Figure 94: Cluster card

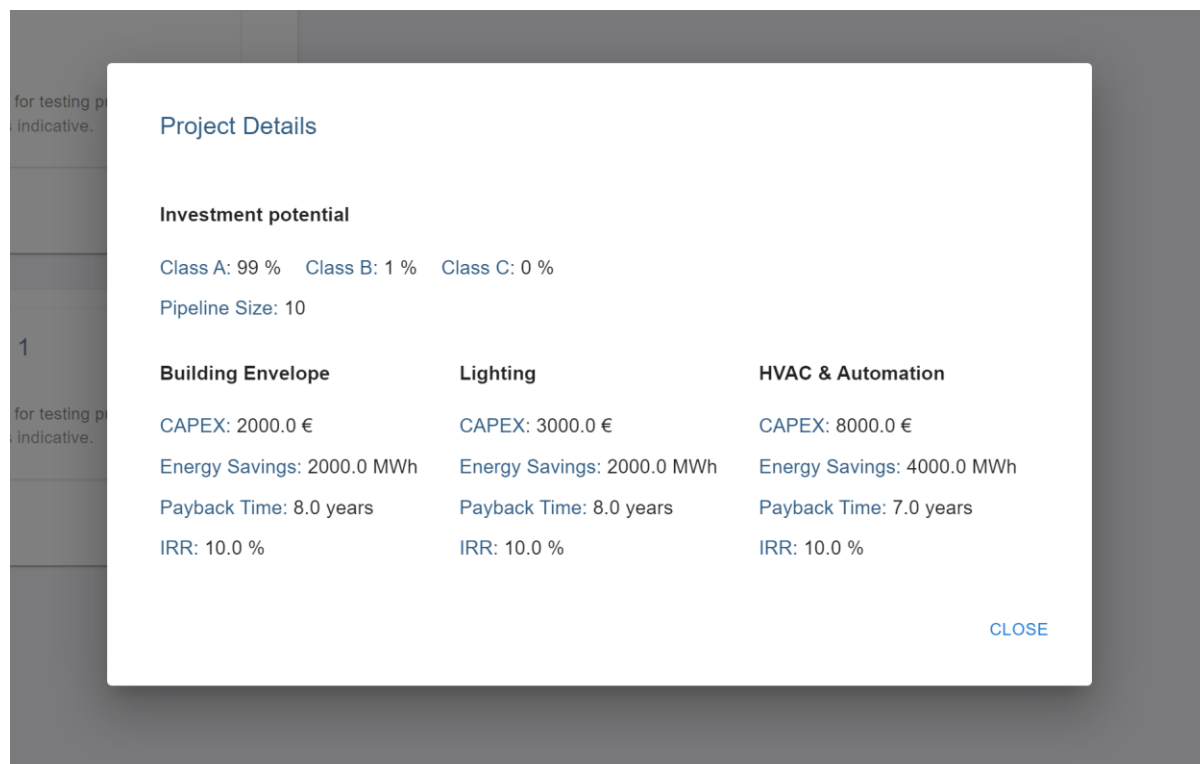


Figure 95: Overview of cluster information

⁴ Elissaios Sarmas, Evangelos Spiliotis, Vangelis Marinakis, Themistoklis Koutselis, Haris Doukas, A meta-learning classification model for supporting decisions on energy efficiency investments, Energy and Buildings, Volume 258, 2022, 111836, ISSN 0378-7788, <https://doi.org/10.1016/j.enbuild.2022.111836>.

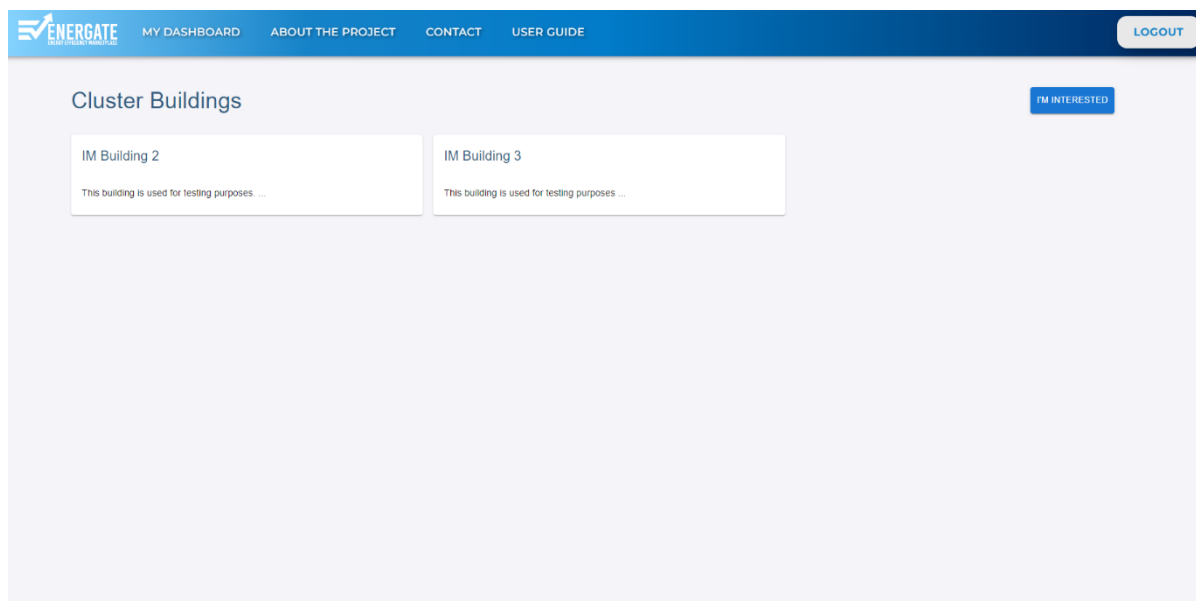


Figure 96: Buildings inside a cluster

Once the Financier has clicked the “**See more**” button to view a cluster in detail, they can click on each building’s card individually and view the building information, which is shown in Figure 97: Building information depicted in detail and includes:

- The company name of the Building Owner
- A short description of the building
- The building typology
- The country, region and climate zone where the building is located
- The building’s year of construction
- The size of the building
- The number of floors
- The occupancy level
- The heating and cooling type installed in the building
- The annual electricity, heating and cooling consumption
- The preferred types of financing

By navigating to the next tab, the user can then view the final offer the Implementor has prepared. As depicted in Figure 98 and Figure 99, the information provided by the Implementor is the following:

- The company name of the Implementor
- The energy efficiency measures the Implementor intends to implement
- Additional details about the project’s financing
- The pipeline size
- For each energy efficiency measure category:
 - The energy savings
 - The reduction in operation and maintenance costs
 - The CAPEX
 - The avoidance cost
 - The payback period
 - The IRR
 - The NPV
- The estimated CO₂ abatement

- The expected energy class after the implementation of the measures
- The upfront cost
- The description of the final offer for the project, including more qualitative information.
- The type of contract proposed
- The construction financing
- Whether the investment is linked with subsidies
- The monetary contribution by end client

BUILDING INFORMATION
OFFER 1/2
OFFER 2/2

Building Information

Company Name
NTUA Implementor

Description
This is a building used for testing purpose

Building Typology
Industrial Building

Country
Greece

Province / Region
Athens

Climate Zone

Construction Year
2000

Building Area
200

Number of Floors
2

Occupancy Levels
2

Heating Type Installed
-

Cooling Type Installed
-

Annual Electricity Consumption (kWh)
1000

Annual Heating Consumption (kWh)
1000

Annual Cooling Consumption (kWh)
1000

Desired Building Financing

☒ As a Service
☐ Energy Performance Contract (EPC)
☐ On-Bill
☐ Bank Loan
☐ Operating Lease

Figure 97: Building information depicted in detail

SHB

BUILDING INFORMATION

OFFER 1/2

OFFER 2/2

Project Offer

Company Name	Energy Savings Assessment	
NTUA Implementor	(kwh/year)	
Technology / Type of measure interest	Lighting	Avoidance Cost
	Electricity savings *	Avoidance Cost for lighting (€)
	1000	100
Lighting		Avoidance Cost for HVAC/ heat p...
Light Replacement	Heating, Ventilation and Air Conditioning, Heat Pumps, Automation etc	1000
✓ Application of manual dimmers	Electricity savings *	
Control / Automation	2000	Payback Period (years)
✓ Application of light management systems, with the integrated ability to adjust to daylight (daylight sensor integrated)	Thermal savings *	Payback Period for lighting *
	2000	8
	Total (Electricity) *	Payback Period for HVAC/ heat p...
	3000	7
Automation	Total (Thermal) *	
Supervision / Management / Control	2000	Internal Rate of Return (IRR)
✓ Installation of systems for supervision, management and regulation of peak loads	Estimated CO2 Abatement (%) *	IRR for lighting *
	80	10
HVAC	Energy Class after Implementatio...	IRR for HVAC/ heat pumps/ auto...
Heating Systems	B	10
✓ Installation of thermostatic radiator valves		
✓ Installation of electronic wireless thermo-regulation radiator valves with controllers or programmable thermostatic heads	Reduction in operation and maintenance costs	Net Present Value (NPV)
Cooling Systems	Reduction for lighting (€) *	NPV for lighting *
✓ Installation of air conditioning systems	800	10
	Reduction for HVAC, heat pumps...	NPV for HVAC/ heat pumps/ auto...
	900	10
Renewable Systems		
Application of Heat Pump for Low Temperature Heating System	CAPEX	
✓ Ground sources - vertical loops	Capex for lighting (€) *	
	2000	
	Capex for HVAC, heat pumps, au...	
	8000	

Project's details for which fin...

Figure 98: Building's offer depicted in detail (1/2)

BUILDING INFORMATION
OFFER 1/2
OFFER 2/2

Final offer for the project
-

Type of contract proposed
☒ Power Purchase Agreement
☐ As a Service
☐ Energy Performance Contract (EPC)
☐ Operating Lease
☐ Other

Construction Finance
☒ Bridge Loan
☐ Own Funds
☐ Other

Contribution by End Client (%)
10

Invest Along Subsidies
☒ Yes
☐ No

Figure 99: Building's offer depicted in detail (2/2)

After viewing the project in detail, the Financier can decide whether they are interested in the project or not, and upload a term sheet if interested, by clicking the ***"I'm interested"*** button.


MY DASHBOARD
ABOUT THE PROJECT
CONTACT
USER GUIDE
LOG

Cluster Buildings
IM INTERESTED

You can select the buildings you want to finance and upload a term sheet.

Riverside Office Office ... ☒	Office Towers Office tower ... ☒	GreenTech Company Company ... ☐
--	---	---

Figure 100: "I'm interested" option

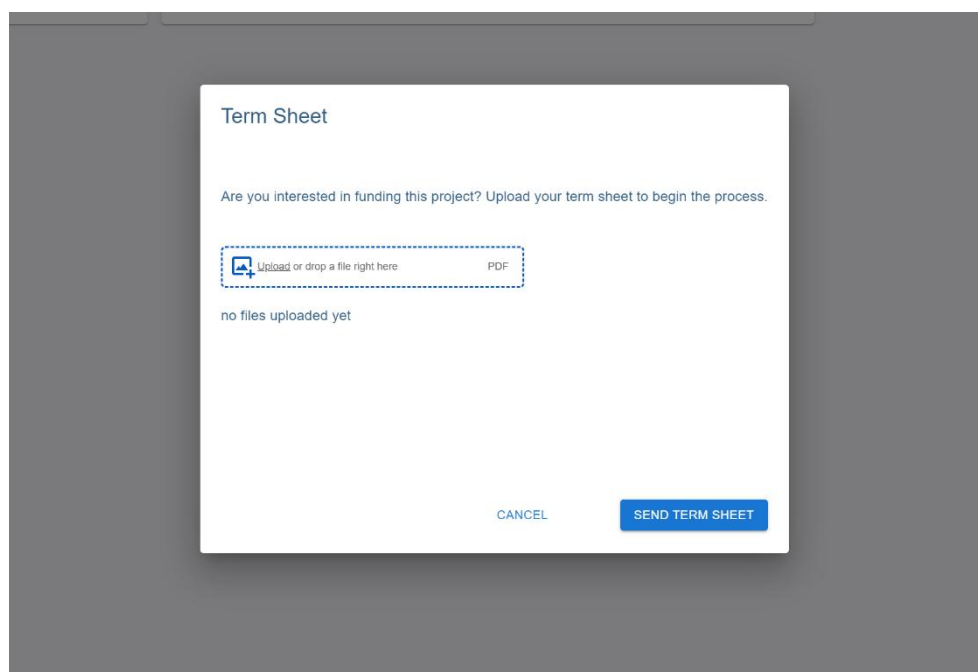


Figure 101: Upload a term sheet.

7.3. Public Buildings

Financiers can open “**Public Buildings**” from the left navigation drawer to see a list of candidate public buildings submitted for energy-efficiency assessment. This board is informational only—it helps Financiers get familiar with potential opportunities that may become investable later.

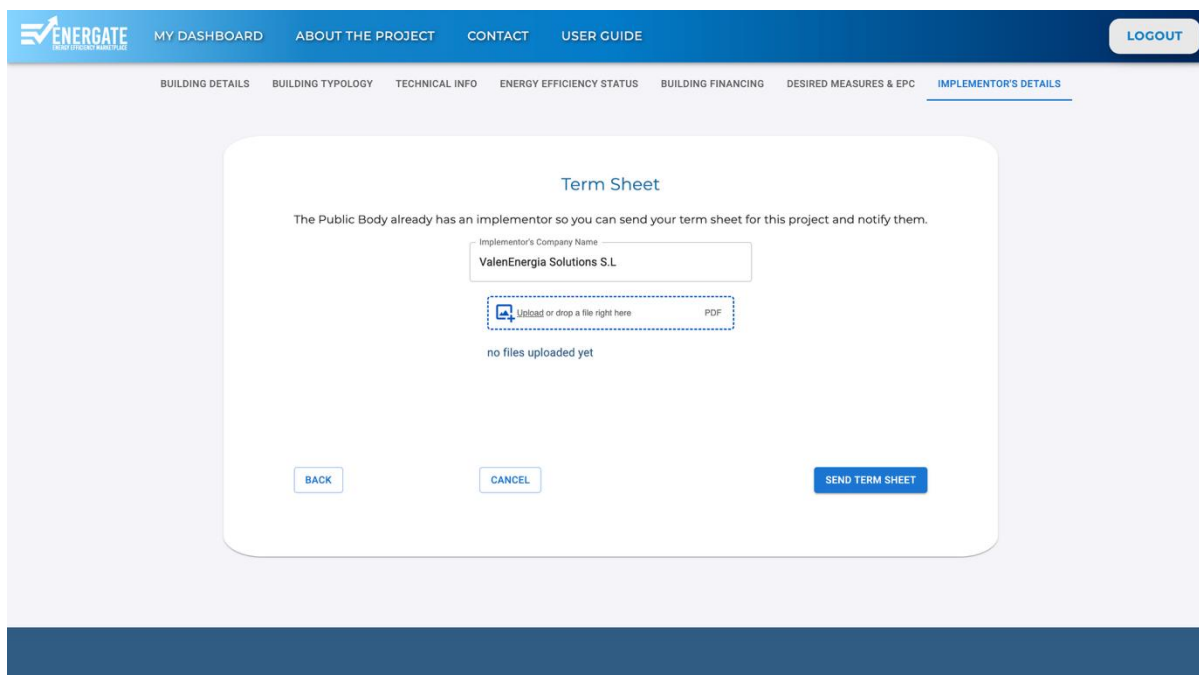
By clicking on a building’s card, Financiers can view:

- Building Details
- Building Typology
- Technical Info
- Energy Efficiency Status
- Project Financing
- Preferred Measures

This page displays two categories of public buildings:

- Buildings already assigned to an Implementor
- Buildings above the tender threshold without an assigned Implementor.

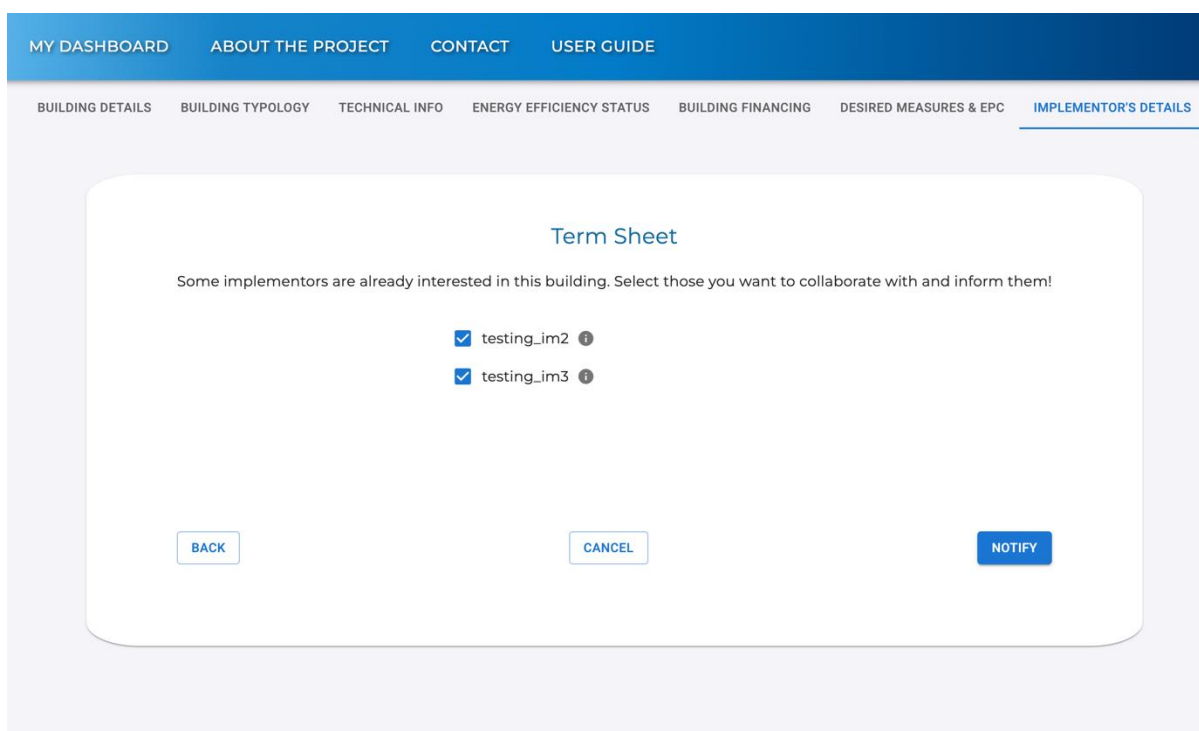
When a Financier selects a building that already has an Implementor, they can upload and submit their term sheet directly for that project.



The screenshot shows the 'Term Sheet' upload interface. At the top, there is a navigation bar with links: MY DASHBOARD, ABOUT THE PROJECT, CONTACT, USER GUIDE, and a LOGOUT button. Below this is a sub-navigation bar with links: BUILDING DETAILS, BUILDING TYPOLOGY, TECHNICAL INFO, ENERGY EFFICIENCY STATUS, BUILDING FINANCING, DESIRED MEASURES & EPC, and IMPLEMENTOR'S DETAILS (which is highlighted). The main content area is titled 'Term Sheet' and contains the text: 'The Public Body already has an implementor so you can send your term sheet for this project and notify them.' Below this text is a form with a label 'Implementor's Company Name' and a text input field containing 'ValenEnergia Solutions S.L.'. There is a dashed box for file upload with the text 'Upload or drop a file right here' and a 'PDF' icon. Below the upload box, it says 'no files uploaded yet'. At the bottom of the form are three buttons: BACK, CANCEL, and SEND TERM SHEET.

Figure 102: Upload a term sheet

When a Financier selects a building that does not have an Implementor but the project financing is estimated above the tender threshold, they can see a list of the Implementors that are interested in that building.



The screenshot shows the 'Term Sheet' interface with a different message: 'Some implementors are already interested in this building. Select those you want to collaborate with and inform them!'. Below this message is a list of implementors with checkboxes and information icons. The list includes 'testing_im2' and 'testing_im3', both of which are checked. At the bottom of the form are three buttons: BACK, CANCEL, and NOTIFY.

Figure 103: Interested Implementors

By clicking the info button at the end of each Implementor's name the user can see some information about the Implementor.

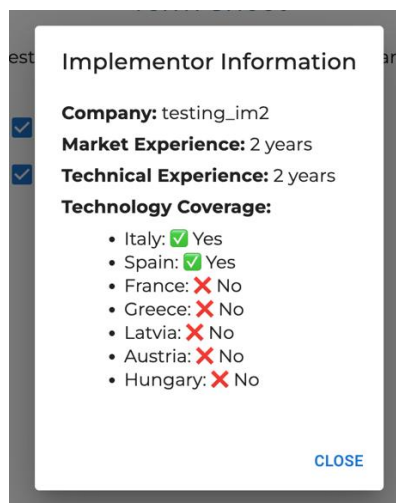


Figure 104: Implementor information

Financiers can view the list of Implementors who have already expressed interest in the project. They may select the ones they wish to collaborate with and send them a notification by selecting the button “**Notify**”.

After this action, a green check icon appears in the “**Matched Public Buildings**” tab, indicating that the selected Implementors for that project have been successfully notified.

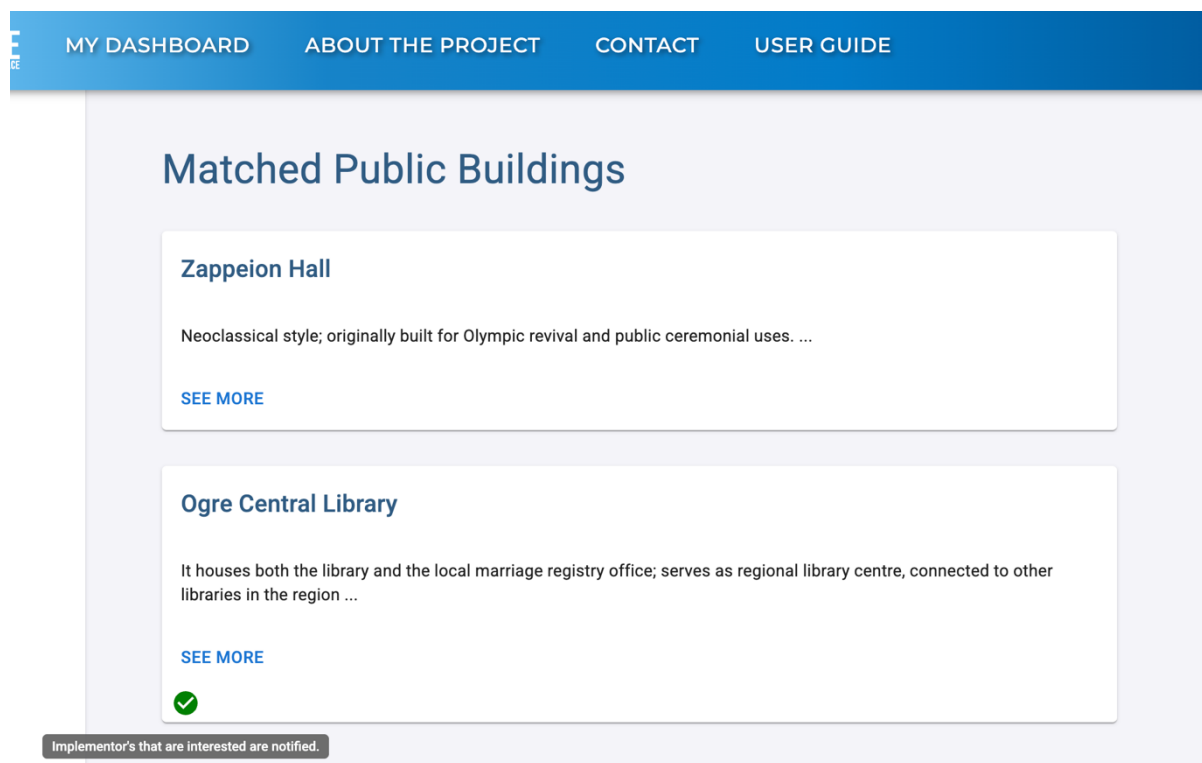


Figure 105: Implementors are notified for the Financier's interest

7.4. Accepted projects

When the Implementor has accepted the term sheet, the Financier can view the accepted project by clicking the “**My Projects**” tab in left - side navigation bar.

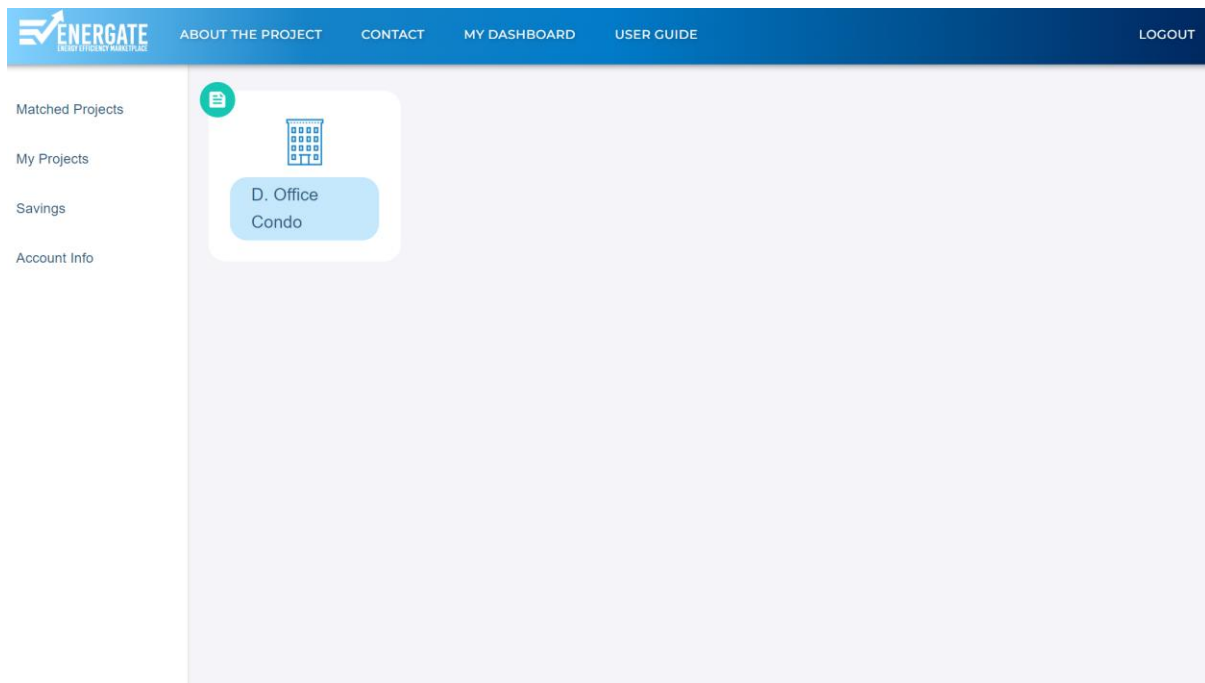


Figure 106: Financier's accepted projects

By clicking on the green icon on the top left corner of the building card, the user can review the building information, the Implementor’s complete offer and the uploaded term sheet.

BUILDING INFORMATION
OFFER 1/2
OFFER 2/2
TERM SHEET

Building Information

Company Name
ntua_test_im

Annual Electricity Consumption (kWh)
2000

Description
This building is used for testing purposes.

Annual Heating Consumption (kWh)
2000

Building Typology
Industrial Building

Annual Cooling Consumption (kWh)
2000

Construction Year
2000

Desired Building Financing

Building Area
200

☐ As a Service

Number of Floors
2

☒ Energy Performance Contract (EPC)

Occupancy Levels
60

☒ On-Bill

Heating Type Installed
AC 2005

☒ Bank Loan

Cooling Type Installed
AC 2005

☐ Operating Lease

GO BACK

Figure 107: Detailed project information

BUILDING INFORMATION	OFFER 1/2	OFFER 2/2	TERM SHEET
Project Offer			
Company Name ntua_test_im	Energy Savings Assessment (kwh/year)	Avoidance Cost	
Technology / Type of measure interest	Building Envelope	Avoidance Cost for building envel...	0.02
Building Envelope	Electricity savings *		
Insulation	Thermal savings *	Payback Period (years)	
☒ Thermal insulation of outer walls and thermal bridges ☒ Thermal insulation of walls ☒ Thermal insulation of floor ☒ Thermal insulation of roof	Total (Electricity) *	Payback Period for building envel...	8
Windows	Total (Thermal) *	Internal Rate of Return (IRR)	
☒ Replacement of existing windows with EE windows	Estimated CO2 Abatement (%) *	IRR for building envelope *	12
Project's details for which fina...	Energy Class after Implementatio...	Net Present Value (NPV)	
The energy renovation project for the downtown office building seeks	Reduction in operation and maintenance costs	NPV for building envelope *	120
Pipeline size	Reduction for building envelope (...)		
1000000	CAPEX		
	Costs for building envelope (€) *		

Figure 108: Implementor offer 1/2

BUILDING INFORMATION	OFFER 1/2	OFFER 2/2	TERM SHEET
Final offer for the project			
12000			
Type of contract proposed			
☒ Power Purchase Agreement ☒ As a Service ☐ Energy Performance Contract (EPC) ☐ Operating Lease ☐ Other			
Construction Finance			
☐ Bridge Loan ☒ Own Funds ☐ Other			
Contribution by End Client (%)			
7			
Invest Along Subsidies			
☐ Yes ☒ No			

Figure 109: Implementor offer 2/2

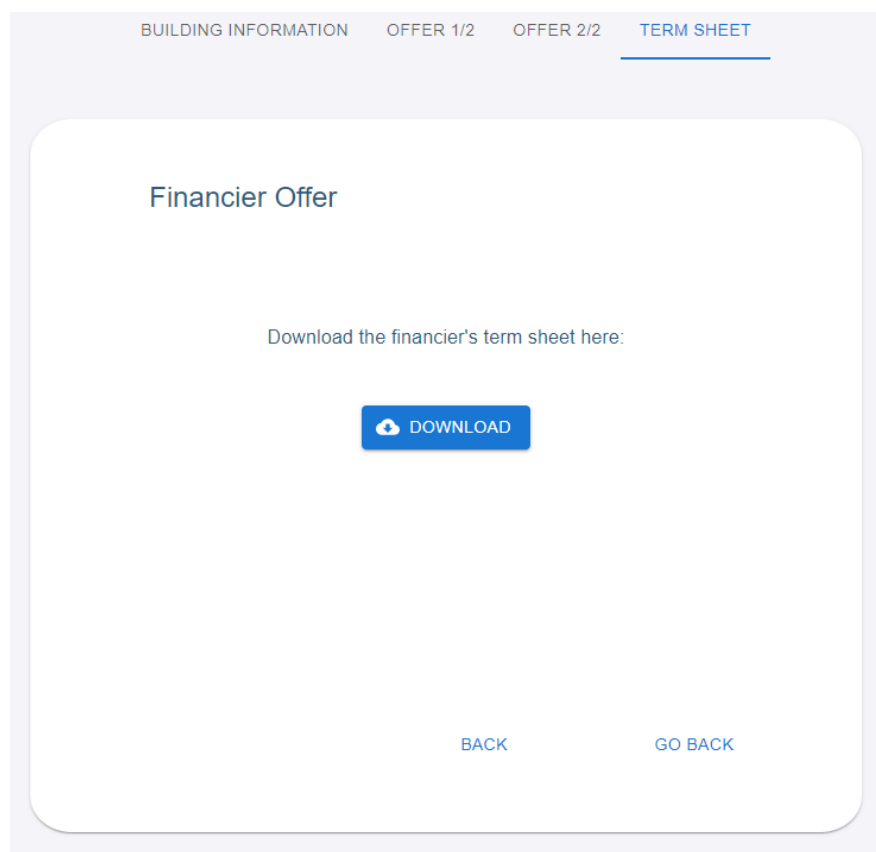


Figure 110: Financier term sheet

7.5. Financial Products

Financiers can utilise this section to design, configure, and publish tailored financing instruments specifically developed to support energy efficiency improvements in buildings that meet defined eligibility criteria. These financial products may include retail or wholesale green loans, green mortgages, sustainability linked loans, banking products derived from issued green bonds or other innovative financial mechanisms which aim to facilitate access to capital for retrofitting projects. By customising the terms, conditions, and scope of each offer, Financiers can align their investment strategies with the specific needs of Building Owners and the technical requirements of proposed energy-saving measures.

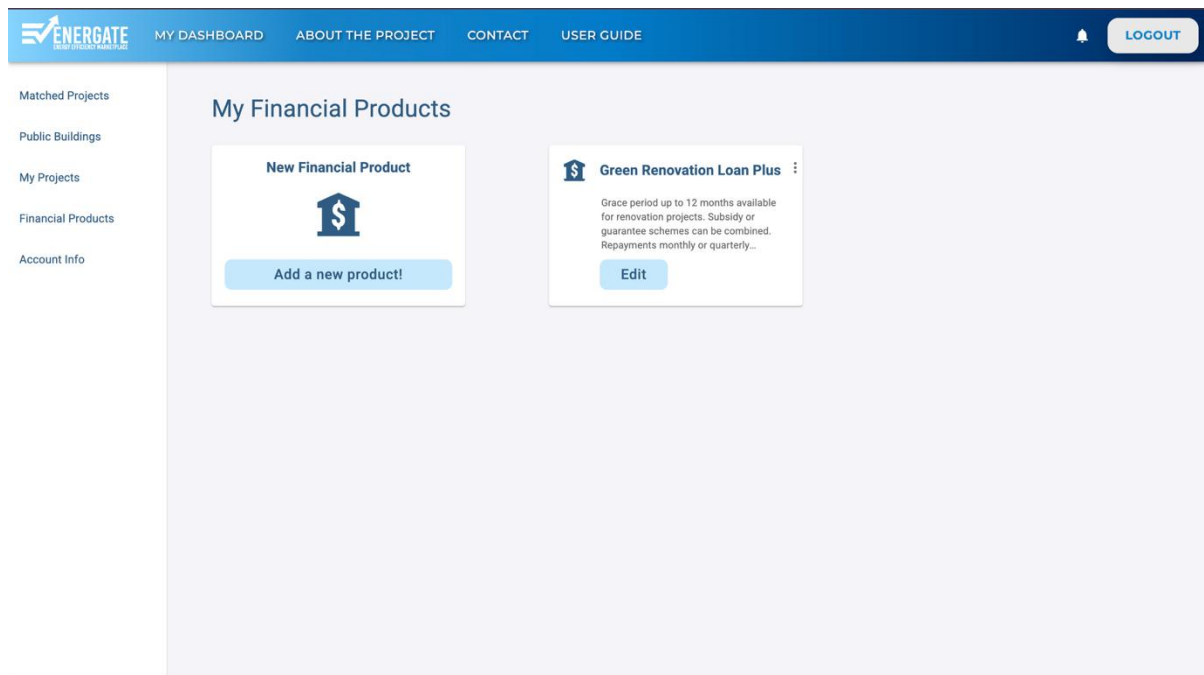


Figure 111: Financing Option section

By clicking on “**Add a new product!**” a form appears allowing Financiers to specify key characteristics of their financial product.

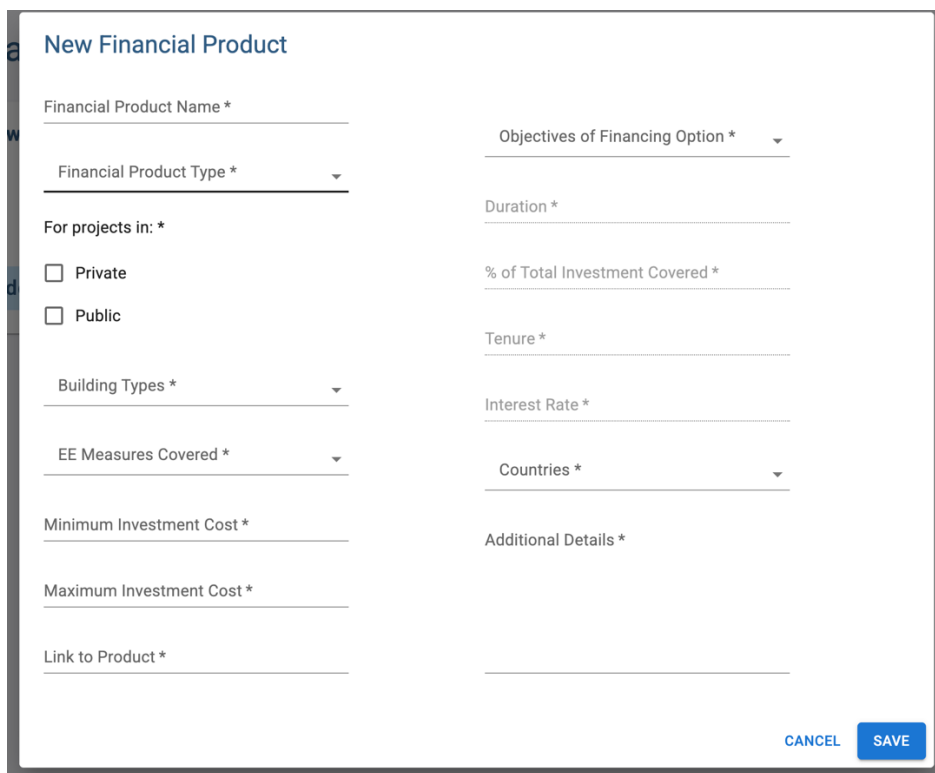


Figure 112: Adding new financial product

The key characteristics are:

Table 24: Financing Products fields

Fields	Description
Financing product name	The name of the financing offer/product that will appear to users able to match with it.
Financing product type	The type of financing product offered. The different options include • Green Retail Loans • Green Wholesale Loans • Sustainability Linked Loans • Green Mortgages • Banking Products derived from issued Green Bonds • Other
For projects in	• Private • Public
Building Types	• Commercial Building • Industrial Building • Factory/Manufacturing • Office Space • Residential • Share Space • Accommodation/Hotel • Spa Resort • Education Facility • Healthcare Facility • Sport Facility • Municipal Building • Social Housing • Other
EE measures covered	• Building Envelope • Lighting • HVAC • Automation • Renewable Systems
Minimum investment cost	Minimum amount of money that can be provided to the Building Owner or Public Body.
Maximum investment cost	Maximum amount of money that can be provided to the Building Owner or Public Body.
Link to Product	The official link to the financing option (e.g. banking product) providing additional details, if available.
Objectives of Financing Option	A dropdown menu of different objectives covered by the financing option, including: • CO₂ emissions reduction • Increase in renovations

Fields	Description
	- Higher energy efficiency / Improvement in energy efficiency / Energy upgrades - Decarbonisation of heating and cooling - Transition to renewable energy sources - Assistance to vulnerable households and SMEs through renovation - Restoration or maintenance of historic buildings - Preservation of energy security and biodiversity - Repair of residences and their energy upgrade (for leasing purposes) - Reduction in energy needs/consumption - Reduction of Europe's dependency on fossil fuels - Making the country more self-reliant - Production of clean energy - Other
Duration (years)	The Duration indicates the total length of the financing period — that is, how long the Building Owner has to repay the financing.
Percentage of total investment covered	Percentage of total costs of the energy efficiency project that the Bank is willing to cover – the Building Owner will cover the rest with their own funds.
Tenure	The number of years the debt should be repaid.
Interest Rate	The Interest Rate represents the percentage charged on the total amount financed. It determines how much the Building Owner will pay in addition to the borrowed amount over time.
Countries	The Financier can select for which countries that financing option will be applicable: - Greece - Spain - Austria - Italy - Latvia - France - Hungary
Additional Details	The Financier can add here any additional details regarding the financing option.

When a Financier adds a new financing product to the platform, Building Owners can view and evaluate it. If a Building Owner decides to express interest in a financing product, the owner must select which specific building they want to associate with that option.

Once a building is selected, the Financier is automatically notified that a Building Owner is interested in the proposed financing option for a particular building as can be seen in Figure 113.

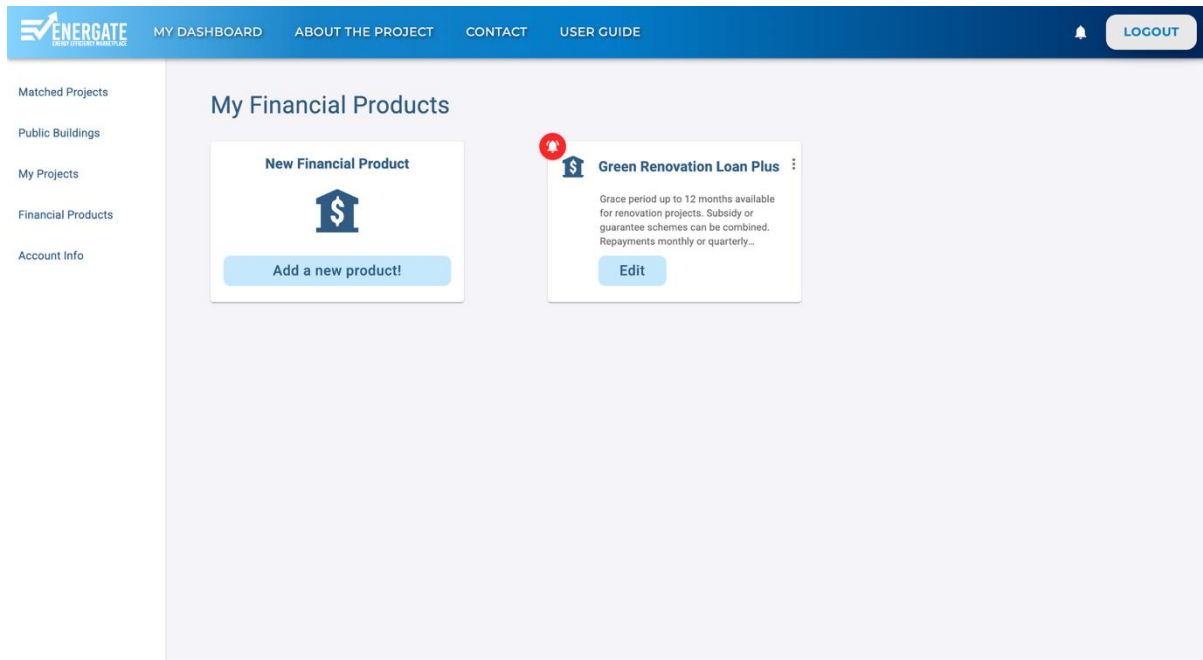


Figure 113: Building Owner's interest notification

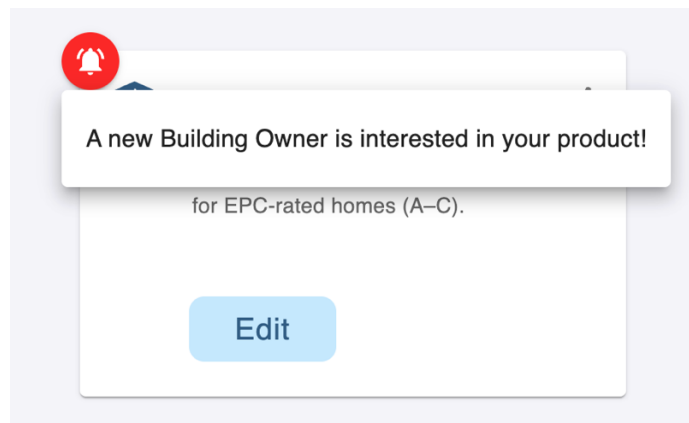


Figure 114: Building Owner's interest notification (2)

Once the Financier selects the red icon, there is access to the buildings that the Building Owner has selected for that specific financial product.

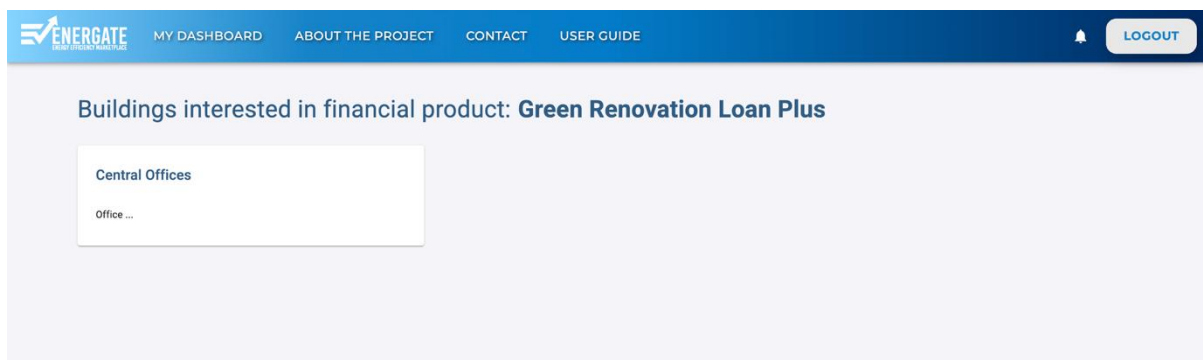


Figure 115: Buildings interested in this Financial Product

The Financier can choose a building card and see more information about that building.

Building Information

Company Name

testing_bo

Description

Office

Building Typology

Office Space

Country

Greece

Province / Region

Athens

Cimate Zone

Construction Year

2010

Building Area

600

Number of Floors

3

Occupancy Levels

3

Heating Type Installed

AC-2010

Cooling Type Installed

AC-2010

Annual Electricity Consumption (kWh)

100

Annual Heating Consumption (kWh)

100

Annual Cooling Consumption (kWh)

100

Desired Building Financing

☒ As a Service
 ☒ Energy Performance Contract (EPC)
 ☐ On-Bill
 ☐ Bank Loan
 ☐ Operating Lease

Figure 116: Building information in Financier profile

7.6. Financier account information

The Financier can see the account information by selecting the “**Account Info**” option from the navigation bar.

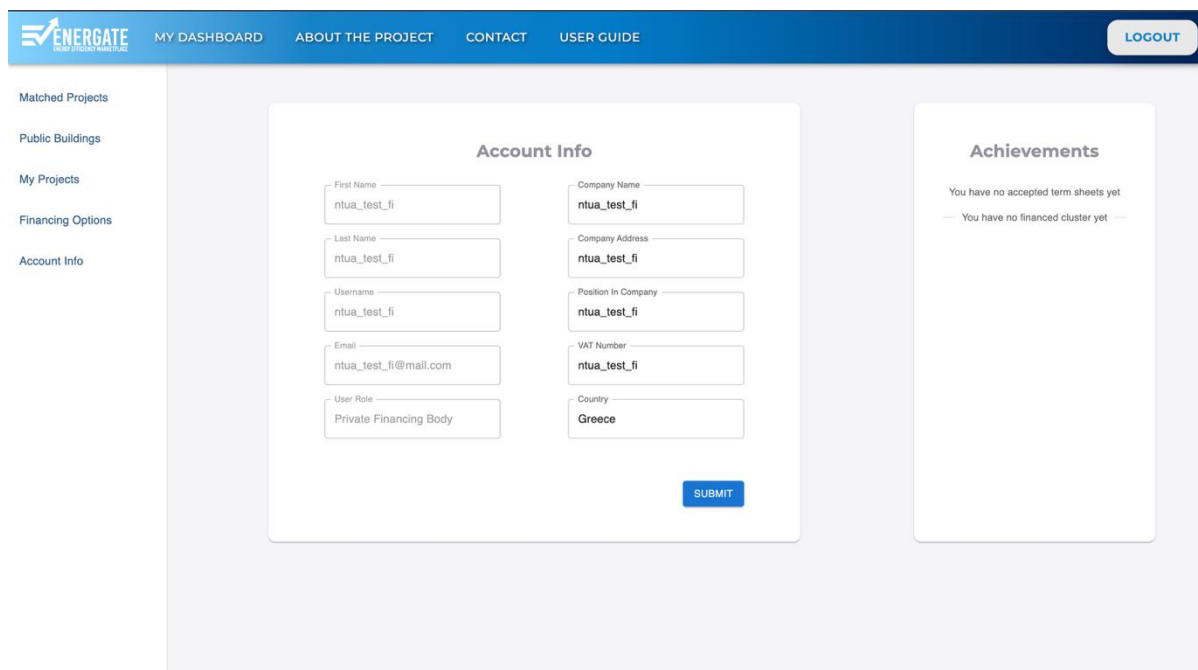


Figure 117: Financier account information

The Financier can also update the information by changing any field and by clicking “**Submit**” at the end of the form.

The **Achievements** section rewards Financiers for their contributions and engagement on the platform. These visual badges are automatically awarded as the Financiers complete key milestones and help them track their impact and activity. Below are the main use cases tied to achievements:

Table 25: Type of achievements

Badges/Achievements	Description
Acceptance Rate (%)	Refers to the percentage of term sheets offered by a Financier that are accepted by the recipients
Number of financed clusters	Refers to the total number of clusters the Financier has financed

8. Deliver Stage

The Deliver Stage is offered as an on-request service for users who wish to evaluate the technical, financial, comfort, and environmental performance of their renovation projects through the ENERGATE platform. The Deliver Stage aggregates the results of all integrated analytics services and presents them in an interactive, visual dashboard. This service is particularly useful for Implementors and Financiers who need a clear, data-driven summary of the post-renovation impacts.

Moreover, the Deliver Stage brings together results from various initiatives and EU projects such as energy prediction, investment clustering (MATRYCS), after-renovation value estimation (ReLIFE), comfort monitoring (DigiBUILD), energy performance calculations (MODERATE pyBuildingEnergy), as well as other indicators such as EPC changes and smart readiness assessments (SRI-ENACT). By integrating these services into a single interface, it eliminates the need for users to interact with each model separately and provides a cohesive post-renovation evaluation environment.



Figure 118: Deliver stage overview.

At the top of the Deliver dashboard, the Indoor “**Air Quality & Comfort Insights**” section presents occupant comfort and system usage metrics. Here, users can see indoor and outdoor temperature profiles plotted over time, along with the PMV index that reflects perceived thermal comfort. The panel also shows comfort percentage, the number of heating and cooling hours, and the electricity consumption of AC systems.

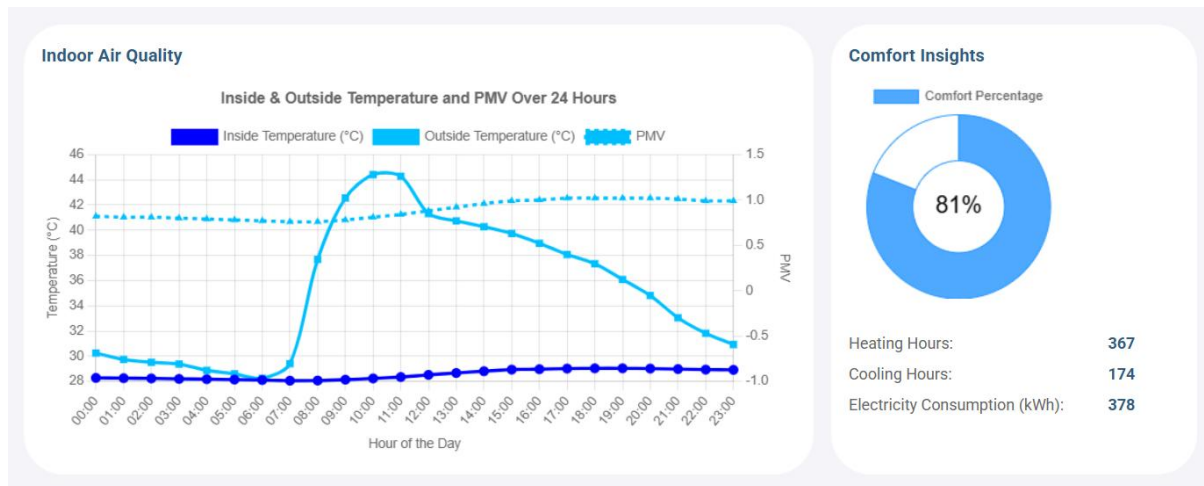


Figure 119: IEQ and comfort insights integrating s3.1.1 from DigiBUILD.

On the right side of the dashboard, the “**Financial Insights**” section summarises the economic performance of the renovation project, by presenting key indicators such as payback time, IRR, NPV, ROI and avoidance cost, which help assess cost-effectiveness. Below, the “**Measures & EPC Ratings**” panel displays the pre- and post-renovation energy efficiency classes of the building and the main systems that were renovated. The section also presents various non-energy benefits and certifications, such as the After Renovation Value, LEED, WELL, BREEAM and FitWel Levels.

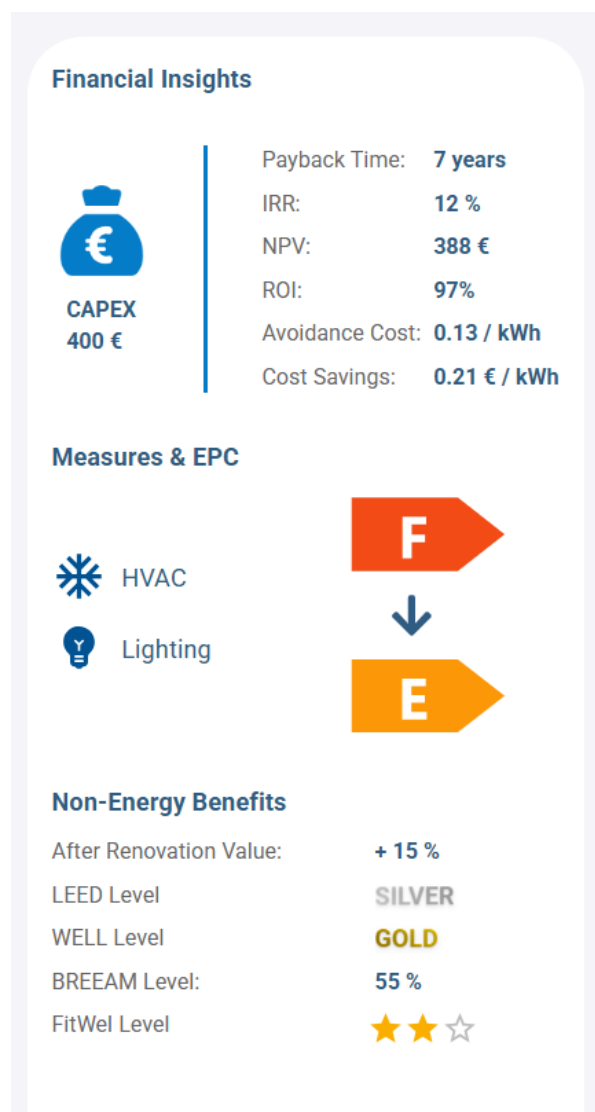


Figure 120: Financial Insights using data from ENERGATE and the ReLIFE ARV service.

Next, the “**Energy Consumption Overview**” section provides a combined historical and predictive view of the building’s energy use. It shows past consumption patterns and forecasted consumption generated by predictive models. It also highlights the expected annual energy savings, both as a percentage and as absolute value.

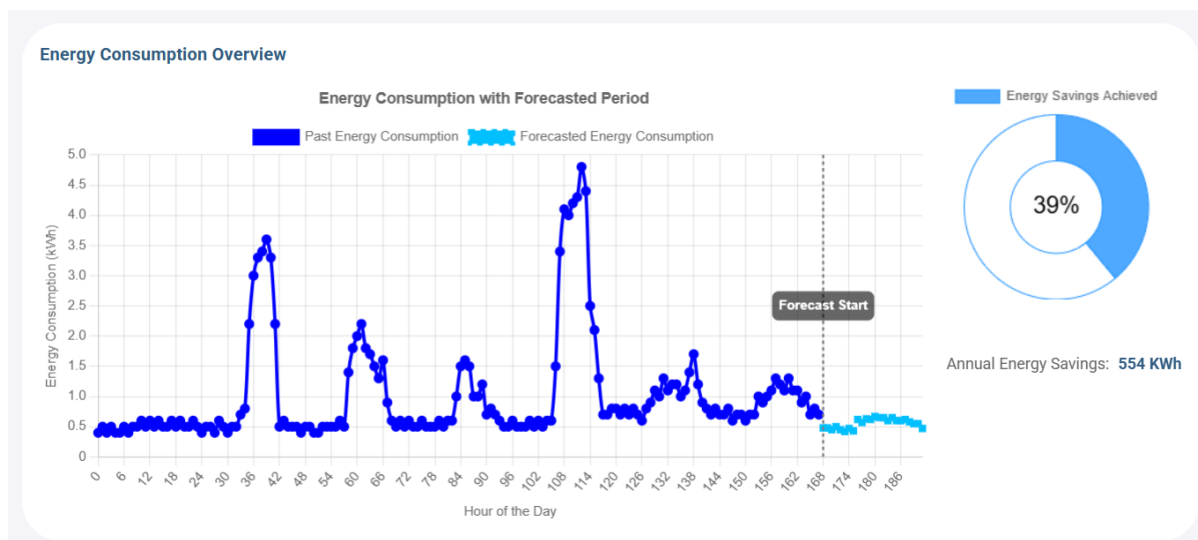


Figure 121: Energy consumption insights integrating services from MATRYCS and MODERATE.

Below this, the “**Energy & Emissions**” section quantifies the project’s environmental impact by comparing CO₂ emissions and total energy use before and after renovation. These visuals help stakeholders understand how proposed measures contribute to climate targets and operational efficiency.

At the bottom right of the dashboard, the “**Net Cash Flow**” section visualises the monthly cash flow profile of the renovation project. It compares the baseline financial situation with the post-renovation projection, helping users understand when and how the investment begins to generate returns. This feature is particularly relevant for Financiers conducting due diligence or assessing the economic feasibility of funded projects.



Figure 122: Energy, emissions and net cash flow charts.

All sections are designed to be intuitive and interactive, allowing users to explore the data behind each indicator. The Deliver Stage thus transforms the technical capabilities of ENERGATE into clear, actionable insights. By providing a single point of access to advanced energy analytics, financial indicators and comfort assessments it supports informed renovation decisions, easier financing, and transparent reporting for all key stakeholders.

9. Conclusions

This deliverable provides guidelines for the final version of the platform and assist new users into understanding and using it. It provides detailed descriptions of the different user types and actions that can be taken through the platform, as well as step-by-step instructions and visualisation for these actions to ensure easy and effective user experience. This report includes the platform's functionalities and interfaces in their final and most complete version.

This final version includes detailed guidelines about the new additions to the platform as well as to facilitate user engagement and allow them to easily understand the objectives and functionalities offered by the platform. At this final stage and following the previous public rollout and release of guidelines that enabled strong user engagement and dissemination activities, more users were brought to the platform and gathered useful feedback for this final release. The platform guidelines are available on the platform, along with explaining videos, and are utilised for the purpose of enabling users to easily access and use the ENERGATE platform.

OUR TEAM

Project Coordinator



See you online!



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ENERGATE Project



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ENERGATE Project