



Deliverable D2.6

Report on Specifications for Project Entries, User Profiles, Use Cases and User Ranks-final version

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List of Abbreviations

ESCOs	Energy Service Companies
ESG	Environmental, Social, Governance
EU	European Union
GUI	Graphical User Interface
ICT	Information Communication Technology
IRR	Internal Rate of Return
KPIs	Key Performance Indicators
M&V	Measurement and Verification
NPV	Net Present Value
RES	Renewable Energy Sources
UC	Use Case
UUR	Updated User Requirement

Executive summary

Within the framework of the ENERGATE project, an ICT platform is developed that aims to facilitate the creation of an effective energy efficiency marketplace, bringing together building owners, implementors and financiers, with the ultimate purpose of accelerating building renovation rates and facilitating stakeholders involved in energy efficiency investments.

This deliverable is the final version of a series of deliverables specifying the inputs and outputs, the workflow, the user categories, the use cases and user requirements of the ENERGATE platform as they have been formulated after the incorporation of the outcomes from the stakeholder consultations (surveys, bilateral and multilateral discussions, regional training workshops). Initially the report focuses on the final definition of the stakeholders of the ENERGATE platform, along with their roles and needs. The use case elicitation is of the utmost importance for forming the specificities of the ENERGATE platform regarding the project entry of the Fetch stage, the aggregation and matchmaking processes of Process stage, as well as the feedback and validation procedures of the Deliver stage. The use cases have been translated to user requirements which set the basis for functional and technical requirements of the platform. In total, 9 fully defined use cases and 57 user requirements were extracted. Finally, drawn conclusions are presented, and next steps are analysed. A summary of the feedback received from stakeholders is provided, resulting in 54 stakeholder suggestions. Based on the initial definitions, combined with the feedback from stakeholders, the workflow demonstrating the flow of actions for users exploiting various functionalities offered by the ENERGATE platform and the use cases have been updated. The main additions compared to the previous version of the report include the revision of the information entries for Financiers so that they can add financing options, inform Building Owners and Public Bodies about them and receive notifications, the additions in the public building profiles to enable better support in selecting the most suitable financing methods, as well as the definition of the inputs and outputs of the Deliver Stage, which monitors the results of the energy efficiency projects after their implementation.

1. Introduction

1.1. The ENERGATE project

Energy efficiency is fundamental for achieving a cost-effective transition towards a decarbonised energy system. However, the energy renovation rates of buildings remain low, creating an urgent need to boost the implementation of energy efficiency measures and mobilise investments.

ENERGATE aims to address this need by creating an effective, ICT-enabled marketplace for energy efficiency investments in buildings. The ENERGATE marketplace is being implemented through a user-friendly platform that connects building owners, implementors of energy renovations and financial institutions to enhance project financing and accelerate renovation rates. The platform facilitates the collection of projects, including project-specific and technical information, the aggregation of similar projects, and their matchmaking with financiers.

1.2. The objectives of this deliverable

ENERGATE needs to deploy an efficient process for collecting information on each individual project and project promoter in the most effective and user-friendly manner while also taking into account the interoperability requirements imposed by the MATRYCS architecture¹. In line with the above, a stepwise approach was employed for the development of the front-end in order for the latter to benefit from as much user-feedback as possible.

The final version of the Deliverable "Report on Specifications for Project Entries, User Profiles, Use Cases and User Ranks" revises and strengthens various elements that are critical for the design and improvement of the front-end of the platform.

The report defines the ENERGATE users and the use cases developed. Stakeholders are categorised by user type, and their needs and role are defined. The use cases developed describe the various user flows that different categories of stakeholders can follow on the platform to satisfy their needs. Extensive consultation with stakeholders has taken place to ensure that user types and use cases are relevant and cover the needs of a wide range of stakeholders.

The analysis conducted within the present deliverable leads to a complete and concise definition of platform workflows, use cases and user requirements, that have been used to create the current version of the platform. Taking stakeholders' feedback into consideration ensures that the ENERGATE marketplace will be able to truly fulfil the needs of the users and achieve the expected goals. The report is structured as follows:

- In Section 2, the steps followed for defining the workflow of the ENERGATE platform are outlined.
- In Section 3, the user types and stages of the ENERGATE platform are defined.

¹ Pau, M., Kapsalis, P., Pan, Z., Korbakis, G., Pellegrino, D., & Monti, A. (2022). MATRYCS—A big data architecture for advanced services in the building domain. *Energies*, 15(7), 2568. <https://doi.org/10.3390/en15072568>

- In Section 4, the workflow of the platform is presented with a focus on the updated uses cases and information entries.
- In Section 5, the feedback received from stakeholders is discussed along with the changes that it caused in the platform workflow.
- In Section 6, the updated user requirements are listed.
- In Section 7, conclusions and next steps are presented.

2. Methodological framework

The methodology followed to finalise the ENERGATE platform's workflow is shown in Figure 1.

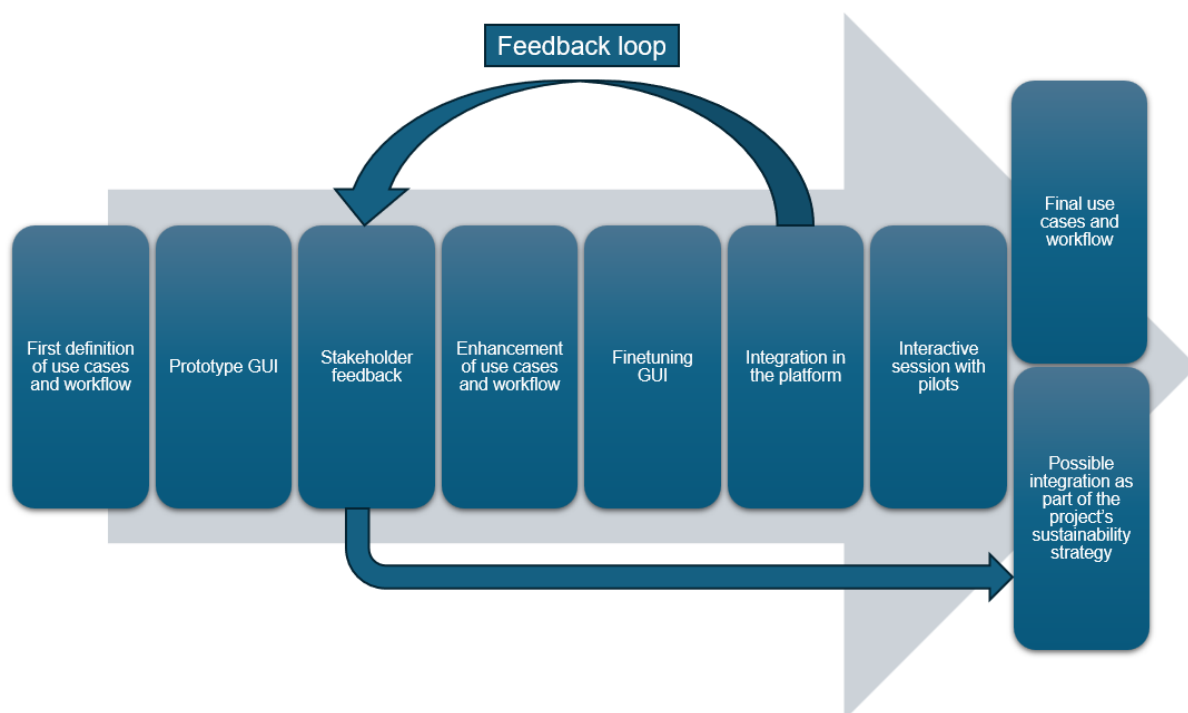


Figure 1: Methodological approach

The steps followed include:

First definition of use cases and workflow (M1-M6): This process was presented in the first version of the report, [Deliverable D2.2-Report on Specifications for Project Entries, User Profiles, Use Cases and User Ranks-v1](#). The user types and user stories were defined using the input collected from the ENERGATE pilot partners. Standardised templates and targeted meetings were used to ensure that the information was collected in a structured manner. Based on this input, the ENERGATE workflow, the first three user profiles, the first four use cases and corresponding information entries were defined.

Prototype Graphical User Interface (GUI) (M6-M12): The initial definition of the platform's information entries, user profiles, use cases and workflow set the basis for the design of the first version of the GUI of the platform using the [Figma Tool](#). For the development of this prototype frontend, information and experiences from both the ENERGATE and the [MATRYCS project](#), as well as other relevant projects, were taken into account. In order to be able to easily demonstrate the GUI and present the initial flow to the stakeholder and gather feedback through the meeting and the surveys, videos were created for each user type and uploaded in the [ENERGATE YouTube channel](#).

Stakeholder feedback (M9-M36): The GUI videos, as well as the additional material created, such as a short description of the project, overview presentations, the [ENERGATE brochure](#), the ENERGATE [one pager](#), and the [ENERGATE user profiles](#))², enabled the collection of

² Communication material available here: <https://energate-project.eu/communication-material>

feedback on the platform's functionalities at an early stage, through stakeholder consultation surveys, bilateral and multilateral meetings, semi-structured interviews and events (e.g. the Regional Training Workshops in Madrid, the REHVA Brussels Summit). Stakeholder consultation is a continuous process.

Enhancement of use cases and workflow (M12-M28): The feedback received was examined, and taken into consideration to inform the use cases, information entries, user requirements and workflow. As a result, a new user profile was created and five additional use cases were defined.

Finetuning the Graphical User Interface (M12-M18): Proposed improvements to the platform from stakeholders were incorporated at the GUI as a first step. This enabled further internal discussions and fine tuning before integrating major changes in the actual ENERGATE platform, since such modifications often require significant changes in the platform's structure and architecture.

Integration in the platform (M15-M30): The platform was developed (back and front end) with the aim of implementing what is presented in the GUI, so that the platform's design is aligned with user requirements, as defined during the stakeholder consultation processes.

Feedback loop (M9-M36): Stakeholder engagement and consultation are continuous processes, since the priority of ENERGATE is to develop a platform that is properly aligned to the needs of the market and the financing community. Therefore, the material and methods used for stakeholder engagement are constantly updated, and tailored for each stage of the project. After its first public release, the platform itself, as well as its [tutorial video](#) have been the most important tools for engaging stakeholders. Stakeholders can become users, test the platform and its services and provide feedback.

Interactive session with pilots & finalisation of workflow (M23): To finalise the platform's workflow, ensuring that the most important suggestions made by the stakeholders will be integrated, an interactive session with the pilot partners of the ENERGATE project took place during the 4th consortium's project meeting in Turin. More information on this session is available in Annex. The platform will continue to be enhanced, considering stakeholders' feedback, until the end of the project, but no major changes will be made so as not to affect the existing workflow and platform architecture.

Planning integration after project's end (M28-M36): This new step has been added to the overall methodology, to reflect that a few of the changes recommended by stakeholders might be currently out of scope for the ENERGATE project (for example they may focus on services that are not related to facilitating financing), or that would require significant readjustment of the platform's architecture. Therefore, these recommendations will be evaluated as part of the sustainability scenarios to exploit and expand the platform beyond the ENERGATE project's completion.

3. Platform User Types and stages

An integral part of the process for the development of the ENERGATE front-end is the definition of the platform users and their activities. The final user types are presented below.

3.1. User types

3.1.1. Building Owner

A “Building Owner” is a user that either owns or manages a private building and is interested in pursuing its energy renovation. The Building Owner has access to technical, commercial, and/or risk-related data for the building, and can enter such data in the platform, so as to compare the building with other buildings that have been renovated in the past, search for technical experts that can implement energy efficiency interventions, and explore possible financing solutions for the project. Stakeholders identified within this group include:

- Private building owners
- Asset managers
- Property/building managers
- Real estate developers/managers

The main additions in the platform’s workflow related to the Building Owner profile, compared to those defined in the previous versions of the report, include:

- The possibility for the Building Owners to directly explore financing options that have been defined by Financiers (e.g. green loans added by banks) and notify the Financiers in case they are interested in those financing options, therefore creating a direct connection between Building Owners and Financiers, as requested by some stakeholders.
- Provision of and access to information related to the project’s results.

3.1.2. Implementor

An “Implementor” is a user that can provide technical support and implement energy renovation projects. A wide range of implementors exist and their role is defined according to their type. Often, they are the enabler of a funded solution, working with Building Owners and Financiers to facilitate the implementation of funded projects. Typically, they collect and process information on buildings, undertake techno-economic analysis of different energy efficiency measures for selected buildings, define projects and offer their services and technical expertise for the implementation of energy renovation projects. An implementor can also create attractive investment opportunities through the aggregation process, and explore finance solutions to implement these projects. Stakeholders identified within this group include:

- Energy Service Companies (ESCos)
- Project Developers
- Engineering Companies

- Architect & Design Companies
- Energy Consultants
- Installers

The main addition to the platform's workflow related to the Implementor profile, compared to the previous versions of the report, is the provision of and access to information related to the project's results.

3.1.3. Financier

A "Financier" is a user that typically provides funding for projects. Through the ENERGATE platform, financiers can explore various investment opportunities specifically related to energy renovation projects in buildings. The platform enables them to access and analyse project data, helping them assess whether they wish to finance these initiatives and decide on the financing method, such as loans, green finance instruments, framework agreements. Key stakeholders in this group are:

- Financial institutions such as commercial banks and development banks that offer loans or green finance products to support energy renovation projects.
- Private investors: High-net-worth individuals or private equity investors interested in funding sustainable energy initiatives with potential long-term returns.
- Investment Funds: Funds focused on climate action, such as energy efficiency funds, renewable energy funds, and infrastructure investment funds that support both private and public sector clients.

The main addition to the platform's workflow related to the Financier profile, compared to the previous versions of the report, is the possibility to add financing options to inform Building Owners or Public Bodies about specific financing tools. The Financiers can receive notifications from Building Owners that are interested in these options.

3.1.4. Public Body

A "Public Body" is an additional user role in the ENERGATE platform. This type of user aims to renovate one or multiple public buildings. The Public Body can use the ENERGATE platform to insert data relevant to the building, according to the predefined information entries, so as to compare their building with other buildings that have been renovated in the past, and explore available EU funding schemes and mechanisms that could finance/fund energy efficiency interventions in public buildings project. Stakeholders identified within this group include:

- Municipalities/cities/communities
- Regions and national authorities
- Other public entities

Additions for this user profile include:

- Separate processes for public procurement and direct award, depending on whether or not the investments exceed the tender threshold.

- Additional financing options, provided by the Financiers in the platform.

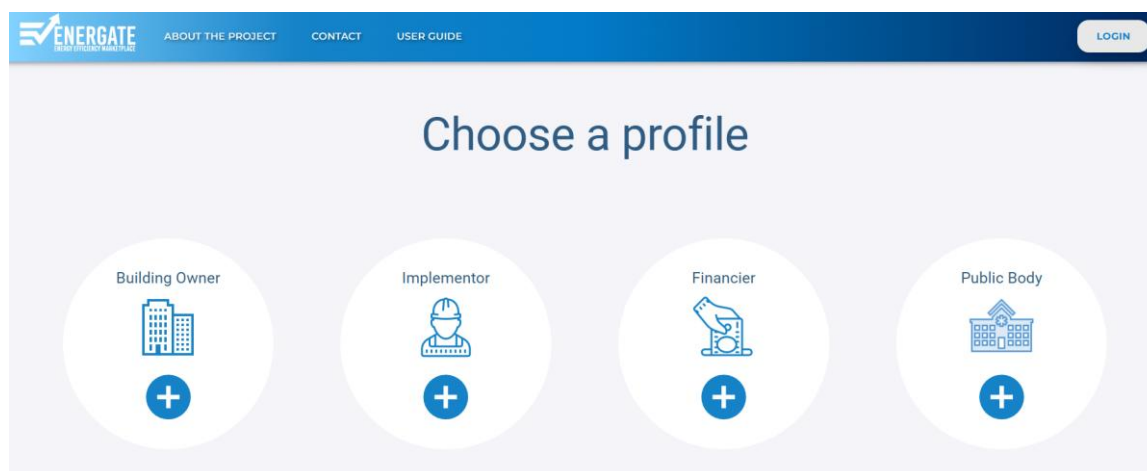


Figure 2: Profile Selection

3.2. Platform stages

The platform stages are described below and shown in Figure 3. These have been slightly modified to accommodate stakeholders' suggestions.

Zero Stage

At Zero Stage, users insert basic personal data and information about their organisation. In line with the feedback received from stakeholders, an interconnection with [European Commission's VAT number validation website](#) is considered, to validate the VAT numbers of the companies that register in the platform.

Fetch Stage

During this stage, users (Building Owners, Public Bodies and Implementors) insert information on buildings. Private and public buildings have different profiles, since some of the information entries differ. Similar buildings incorporated within the ENERGate database are identified to help Building Owners and Public Bodies learn from best practices. In this stage, Implementors can also find buildings of interest, to formulate projects and project offers, which provide all the necessary energy – related and financial project information. The platform supports users in calculating the performance of the formulated projects. Unlike private buildings, projects for public buildings that exceed a specific cost threshold need to follow strict public procurement processes. Thus, in this case, through the platform, Public Bodies will be able to inform Implementors interested in renovating public buildings about upcoming projects. However, if the project of the public building does not exceed the threshold, it could be directly matched with an Implementor.

Process Stage

The aggregation and matchmaking process³ is the core part of this stage, where Implementors group projects according to filters provided by the platform, to create project clusters (aggregation), and Financiers are matched with projects according to their profile and preferences in terms of performance indicators (matchmaking). When matched with projects,

³ Deliverable D3.6 "Report on ENERGate Platform System Design Document (SDD) and Matching and Aggregation Rulebook-final version"

Financiers can provide term sheets to express their willingness to invest in them. Building Owners of private buildings will also be able to explore available financing options, that are added in the platform by Financiers. When a Building Owner is interested in one of the financing options, the Financier will receive a notification. Public Bodies will also be able to explore available funding mechanisms that might be suitable for their projects, either from the platform's repository or from Financiers that have added financing options for projects in public buildings.

Deliver Stage

During this stage, users have access to statistics and visualisations in order to better understand the impact of their renovation projects. The visualisations will be provided based on the available information on energy consumption and energy savings, while additional benefits such as comfort levels, health benefits, and social impact will also be monitored. Financial indicators and cash flows will also be included in the Deliver Stage, when applicable. The information of the Deliver Stage will be used in order to feed in the user performance feature, which will be provided for each profile and will help users better understand their performance in the platform.

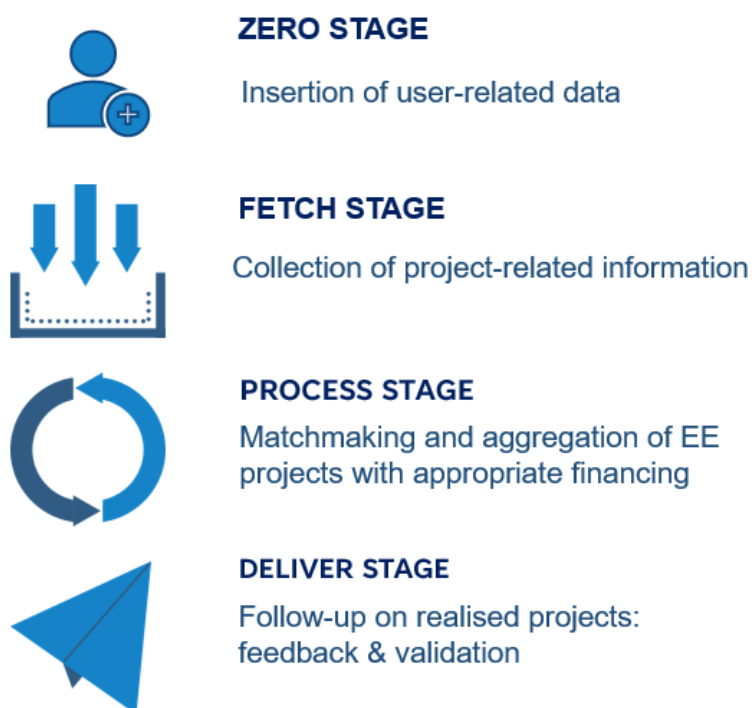


Figure 3: ENERGATE platform stages: overview

4. Platform workflow

The ENERGATE platform has been defined in a way that ensures that the needs of the market are met. This has been achieved through extensive discussions within the consortium and with external stakeholders. In this section, the nine use cases developed are described. These define what each of the four users can do within the platform. Furthermore, information entries and the flow of information within the platform is presented, using appropriate workflows.

4.1. Use Cases

In order to ensure flexibility and a wider uptake of the ENERGATE platform, different use cases have been developed for different users. These use cases define user activity within the platform. Recommendations from previous projects and initiatives, the experience and expertise of project partners and the feedback and suggestions received from external stakeholders have been paramount in the design of these use cases. An overview of the use cases is presented in Table 1.

Table 1: Overview of the 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	An Implementor 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).
UC3	In this Use Case, according to the first version of the deliverable ⁴ , a Building Owner searches for financial support, assuming that the Building Owner has a technical team in – house and therefore will complete the project's offer and search for a Financier without the need of an Implementor as an intermediary. To keep the "Building Owner" profile relatively simple and user friendly, it was decided that in that case the user will register as an Implementor and follow the same workflow as UC2.
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).

⁴

<https://energate-project.eu/sites/default/files/results/D2.2-Report%20on%20Specifications%20for%20Project%20Entries,%20User%20Profiles,%20Use%20Cases%20and%20User%20Ranks-v1-v1.00%20website.pdf>

In the following tables and diagrams, the defined use cases are presented, along with respective goals, triggering events, preconditions and postconditions. Moreover, figures summarising each use case are shown. Under each use case, updates in the design of the use cases are described.

Table 2: Use Case 1 summary

USE CASE 1		
ID		UC1
Name		Building owner searching for technical support and finance
Goal(s)		A private Building Owner wants to find a financed solution for the energy renovation of a building.
Actors		Building Owner, Implementor, Financier
Trigger events		The Building Owner wants to renovate a building and does not have the funds and a technical team in-house.
Preconditions		The user managing the building profile should either be the owner of the asset or have authorisation to engage in such activities, so as to register the building in the platform and fill in the information requested.
Basic Flow	Description	A Building Owner wants to renovate a building and seeks an Implementor that can execute the project and find finance. The owner registers the building in the platform to identify an Implementor. The Implementor formulates an initial offer for the energy renovation of the building and presents this to the Building Owner. Once this is accepted the Implementor prepares a final offer. Specific information of the finalised offer will be shown to the Building Owner and also all the information in the offer will be available to the Financier to finance the project. The Implementor might aggregate the project with other similar projects to facilitate the financing of the project.
	Postconditions	• Offers from Implementors that could implement the project, including final offers to Building Owners and Financiers, which include proposed actions, expected impacts (e.g. energy savings) and the project's financial performance when relevant (i.e. offers for Financiers). • A term sheet from a Financier interested in investing in the project. • The final project financing and implementation is subject to due diligence and the establishment of an agreement between the parties involved.



Figure 4: Use Case 1 overview

No changes have been in UC1 since the previous version of the deliverable.

Table 3: Use Case 2 summary

USE CASE 2		
ID	UC2	
Name	Implementor searching for financing	
Goal(s)	An Implementor wants to find financing for a project	
Actors	Implementor, Financier	
Trigger events	An Implementor wants to access finance for the energy renovation of a building they own or of a client's building or a real estate developer with a technical team in-house wants to communicate directly with financiers through the platform.	
Preconditions	The user (Implementor) must have an agreement with the client (Building Owner), which mandates the user to implement an energy efficiency renovation project, subject to access to finance. The user can therefore fill in the information required by the ENERGATE platform. Alternatively, the user (Implementor) can own or manage a building or be a real estate developer and implement an energy efficiency project.	
Basic Flow	Description	An Implementor aims to implement energy efficiency measures at a building or group of buildings. For the implementation of the identified measures, the Implementor registers on the platform the required inputs for the building, along with information about energy efficiency measures and the financial performance of the project to seek for relevant funding opportunities. Upon receiving a term sheet from a Financier, the Implementor can review it and accept or reject it.

USE CASE 2		
	Postconditions	• A final offer from an Implementor with details about the project, including proposed actions, expected impacts (e.g. energy savings) and the project's financial performance. • A term sheet from a Financier interested in investing in the project. • The financing of the project is subject to due diligence and the establishment of an agreement between the two parties involved.



Figure 5: Use Case 2 overview

No major changes have been made in UC2, but it is worth highlighting that UC3 is no longer applicable because the user is expected to follow UC2's workflow to achieve the same goal. Additionally, if a Building Owner without a technical team in-house wants to have a direct connection with a Financier, this can be achieved through UC9 (defined below).

Table 4: Use Case 4 summary

USE CASE 4	
ID	UC4
Name	Building owner searching for technical support
Goal(s)	A Building Owner wants to: Renovate his/her building and seeks a renovation roadmap Find an Implementor that will undergo the required energy efficiency actions.

USE CASE 4		
		Alternatively, a Building Owner wants to find an Implementor that will provide a financed solutions (i.e. the Implementor will deploy an ESCo business model), but the Implementor has a Finance institution as a partner (framework agreement) and does not wish to use the platform to find finance in the platform.
Actors		Building owner, Implementor
Trigger events		The building owner wants to have a renovation roadmap and access to an Implementor to execute the project.
Preconditions		The user entering the building information should either have ownership of the asset or authorisation to engage in such initiatives, so as to fill in the information requested on the ENERGATE platform. The Building Owner lacks either the access, or the understanding of potential measures that must be applied to his/her property.
Basic Flow	Description	A Building Owner wants to renovate their building and seeks a renovation roadmap and an Implementor that can execute the renovation actions. The owner registers the building within the ENERGATE platform to receive offers from Implementors that will undergo the required energy efficiency actions.
	Postconditions	Offers from Implementors that could undertake the project. A finalised offer with proposed actions and estimated energy savings Project implementation



Figure 6: Use Case 4 overview

No major changes have been made with regards to the definition of UC4.

Table 5: Use Case 5 summary

USE CASE 5	
ID	UC5
Name	Public Body searching for funding sources

USE CASE 5		
Goal(s)		A Public Body wants to explore available funding mechanisms that might be suitable for their energy efficiency project.
Actors		Public Body
Trigger events		The Public Body needs to renovate one or multiple buildings.
Preconditions		The user (Public Body) managing the building profile should have authorisation to provide information requested on the ENERGATE platform.
Basic Flow	Description	A Public Body aims to apply renovation measures to a building or group of buildings. The Public Body registers the required inputs to seek the relevant funding opportunities. The platform will provide the list of funding mechanisms, with a summary of each mechanism and key information (scope, requirements for application, relevant links etc.). The Public Body will also be able to apply filtering mechanisms to see only the most relevant funding sources.
	Postconditions	A list of funding mechanisms and relevant information.

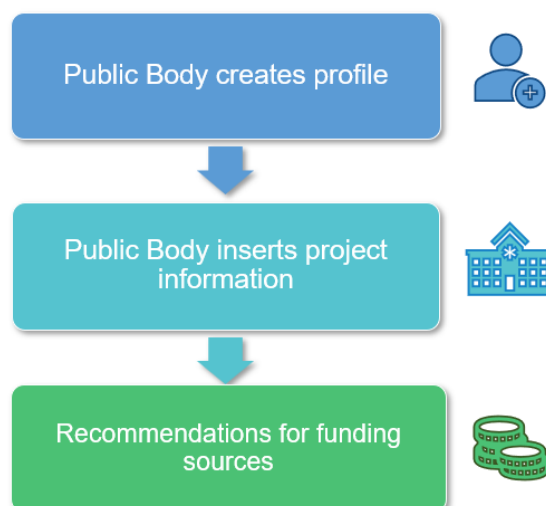


Figure 7: Use Case 5 overview

Use Case 5 has been updated as to reflect the fact that the library of funding options might also include national level funding option that are added by Financiers in the platform. Furthermore, filters will be applied, as defined in Section 4.2.3.

Table 6: Use Case 6.A summary

USE CASE 6.A	
ID	UC6.A
Name	Public Body looking for an Implementor – project above tender threshold
Goal(s)	A Public Body wants to inform Implementors in the platform about a current or upcoming project, giving them the opportunity to prepare better offers for the public procurement.
Actors	Public Body, Implementor
Trigger events	A public building needs renovation and technical support is required.

USE CASE 6.A		
Preconditions		The user (Public Body) managing the building profile should have authorisation to provide information requested on the ENERGATE platform. A public procurement for the project is active or will be active soon.
Basic Flow	Description	A Public Body aims to apply renovation measures to a building or group of buildings. The Public Body registers the required inputs. The user (Public Body) may add the link to the relevant website (e.g. announcement of the energy efficiency project's public procurement, official website for applications to participate in the procurement etc.). The Implementors in the platform can see the list of projects in Public Buildings that fit their criteria. They can access the information provided by the Public Body.
	Postconditions	Enhanced proposals from Implementors for the public procurement of the energy efficiency projects.

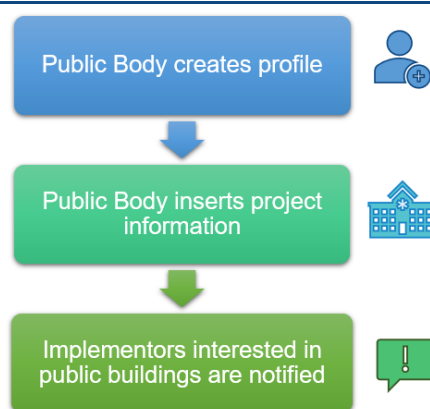


Figure 8: Use Case 6.A overview

Table 7: Use Case 6.B summary

USE CASE 6.B		
ID	UC6.B	
Name	Public Body looking for an Implementor – project below tender threshold	
Goal(s)	A Public Body wants to inform Implementors in the platform about an energy efficiency project, which is below the tender threshold and therefore there is no need for public procurement. This use case could also include other services provided by Implementors, that are below the tender threshold, such as technical studies for energy efficiency projects.	
Actors	Public Body, Implementor	
Trigger events	A public building needs renovation and technical support is required.	
Preconditions	The user (Public Body) managing the building profile should have authorisation to provide information requested on the ENERGATE platform. The CAPEX of the project should not exceed the national tender threshold.	
Basic Flow	Description	A Public Body aims to apply renovation measures to a building or group of buildings. The Public Body registers the required inputs. The Implementors in the platform can see the list of projects in Public Buildings that fit their criteria. They can access the information provided by the Public Body. They can be matched with the project.

USE CASE 6.B		
	Postconditions	Cooperation between the Public Body and Implementor to execute the energy efficiency project (below tender threshold).

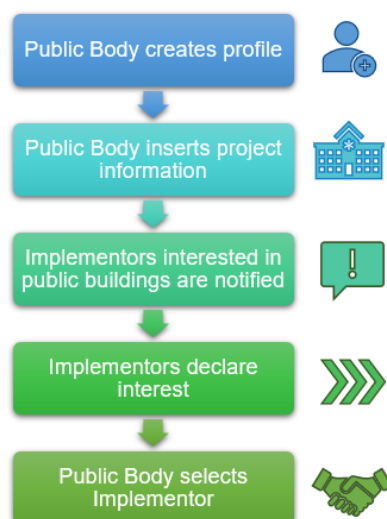


Figure 9: Use Case 6.B overview

No major changes have occurred for UC6.

Table 8: Use Case 7 summary

USE CASE 7		
	ID	UC7
	Name	Public Body looking for financed solution
	Goal(s)	A Public Body wants to inform both Implementors and Financiers in the platform about a current or upcoming project, giving them the opportunity to cooperate and prepare better offers.
	Actors	Public Body, Implementor
	Trigger events	A public building needs renovation and a complete solution including both technical and financial support is required.
	Preconditions	The user (Public Body) managing the building profile should have authorisation to provide information requested on the ENERGATE platform. The Public Body must be actively seeking a financed solution for the project.
Basic Flow	Description	A Public Body aims to apply renovation measures to a building or group of buildings. The Public Body registers the required inputs. The Implementors and Financiers in the platform can see the list of projects in Public Buildings that fit their criteria. They can access the information provided by the Public Body. If they are interested in the same project, the Implementor and Financier will be matched through the platform.
	Postconditions	Cooperation between Implementor and Financier to prepare a financed solution as a proposal for the energy efficiency project.

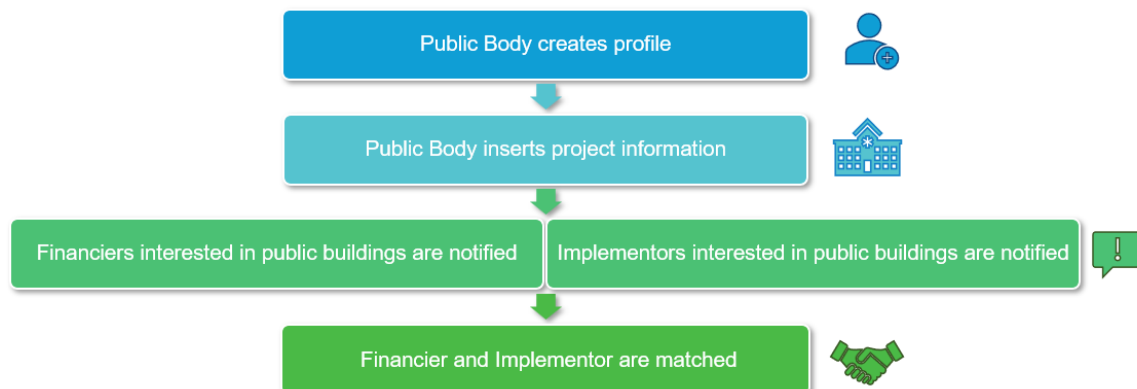


Figure 10: Use Case 7 overview

No major changes have been made to UC7.

Table 9: Use Case 8 summary

USE CASE 8		
ID		UC8
Name		Public Body looking for a Financier
Goal(s)		A Public Body wants to use the platform to connect with Financiers.
Actors		Public Body, Financier
Trigger events		Financing is needed for an energy efficiency project in a public building (the building might have already secured part of the costs through another financing mechanism).
Preconditions		The Public Body managing the building profile should have authorisation to provide information requested on the ENERGATE platform. The energy efficiency project must already be assigned to an Implementor (through direct award or public procurement), so that the KPIs are defined and the Financier can evaluate the project.
Basic Flow	Description	A Public Body aims to apply renovation measures to a building or group of buildings. The Implementor that will execute the projects has been found. The Financiers in the platform will be able to see information about the project to be able to evaluate it and decide whether they will invest in it.
	Postconditions	Financing of the energy efficiency project.

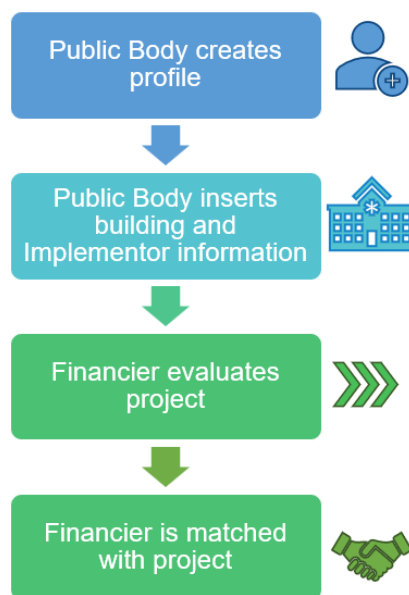


Figure 11: Use Case 8 overview

In UC8 (Table 9 and Figure 11), the Financier evaluates the project after the Implementor has been found and the project is fully defined. This might be important to certain Financiers, especially those that will determine their decision primarily based on the quality of the services that the Implementor that has undertaken the project is expected to provide.

Table 10: Use Case 9 summary

USE CASE 9		
ID	UC9	
Name	Financier adding financing options	
Goal(s)	Increase the visibility of financing options for building renovation	
Actors	Building Owner, Financier (mainly banks)	
Trigger events	The Financier has available financing options that can be used for energy efficiency projects.	
Preconditions	The Building Owner or Public Body must be able to add key information about the energy efficiency projects. The Building Owner must be eligible and interested to receive financing from the bank.	
Basic Flow	Description	A Building Owner aims to apply renovation measures to a building. They will cooperate with an Implementor that does not follow the ESCo model, therefore the Implementor will not be responsible to find finance for the project. The Financier (bank) will add financing options to the platform through specific information entries. The Building Owner will be able to select specific buildings for each financing option and notify the Financier.
	Postconditions	A match between a financing option and an energy efficiency project.

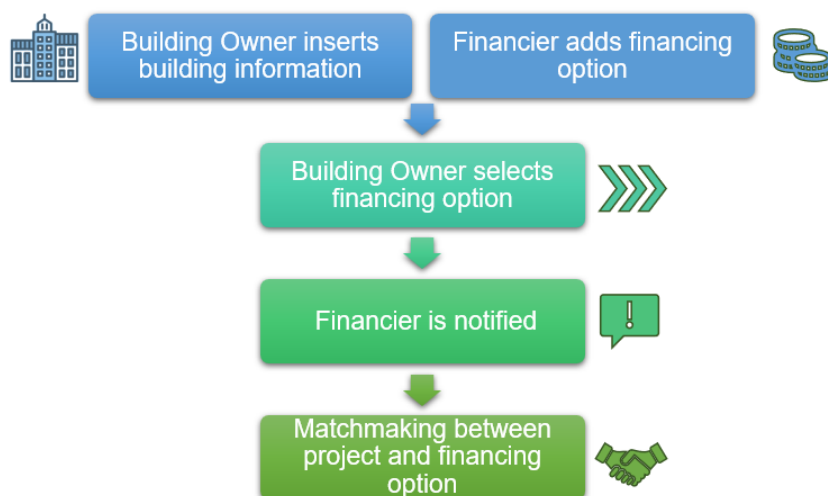


Figure 12: Use Case 9 overview

Use Case 9 enables a more specific approach for banks, allowing them to find projects that fit already existing financing tools/ products that the bank provides. This enables them to receive notifications from users, instead of actively looking for clients on the platform. UC9 also helps the Building Owners easily access the information on existing financing tools, instead of waiting for a Financier to declare interest in their project.

4.2. Information Entries

The previous section provides an overview of the use cases through a high-level definition. In this section, specific information entries of the general platform workflow are provided. The information entries are categorised by platform stage and user profile. Furthermore, to boost the user – friendliness of the platform, explanations have been added for the information fields, which have also been classified as mandatory and optional.

4.2.1. Zero Stage

During this stage, preliminary information is provided by all platform users, so that they can register in the platform.

Table 11: Zero Stage: Building Owner information

Information entries	Details	Explanation	Classification
I am a...	Dropdown menu: • Building owner • Property Manager • Real Estate Developer • Development Manager • Asset Manager • Other	"Building Owner" refers to the user that inserts the information of a building needing renovation in the platform. Here, you can define your specific user role.	Mandatory
I am an entity that...	Dropdown menu: • Is required to report on the EU Taxonomy	Companies/ institutions that fall under the scope of the Corporate Sustainability Reporting Directive (CSRD) have to report in their annual reports to what extent their	Optional

	- Voluntarily reports on the EU Taxonomy - Does not report on the EU Taxonomy - Not applicable	activities are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts. Other companies can decide to disclose this information on a voluntary basis. Here, you can define whether you report on the EU Taxonomy and in what context.	
Looking for...	Tick the box: - Implementor - Financing	An Implementor = technical expert that can undertake the execution of the renovation. Financing = looking for a financial institution or body that is capable of investing in the renovation project.	Optional
Interested in...	Tick the box: - EU taxonomy compliant project offers - Any project offers	Here, you can define whether you are interested in projects/activities that are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts.	Optional

Table 12: Zero Stage: Implementor information

Information entries	Details	Explanation	Classification
I am a...	Dropdown menu: - ESCO/ Project developer - Engineering company - Architect and design company - Energy company/ audit/ consultant - Installer - Maintenance company - Other	"Implementor" refers to the user that can provide technical support for buildings needing renovation and can execute the renovation. Here, you can define your specific role.	Mandatory
I am an entity that...	Dropdown menu: - Is required to report on the EU Taxonomy - Voluntarily reports on the EU Taxonomy - Does not report on the EU Taxonomy - Not applicable	Companies/institutions that fall under the scope of the Corporate Sustainability Reporting Directive (CSRD) have to report in their annual reports to what extent their activities are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts. Other companies can decide to disclose this information on a voluntary basis. Here, you can define whether you report on the EU Taxonomy and in what context.	Optional
Looking to...	Tick the box: - Finance your pipeline - Execute projects	Finance your pipeline means that you have one or more projects underway and you're seeking financing through ENERGATE. Note that the investment should meet a certain threshold (of ...) to be eligible for financing through ENERGATE. Execute projects means that you want to use the platform to find projects that need Implementors to undertake them and possibly find finance for them through the platform.	Optional
Technology Covered	Tick the box(es) See Table 13	-	Mandatory

Information entries	Details	Explanation	Classification
Years of market experience	Text field Number (years)	-	Mandatory
Years of technical experience	Text field Number (years)	-	Mandatory
Geography Covered	Tick the box(es) • Greece • Italy • Spain • Latvia • France • Austria • Hungary	-	Mandatory

Table 13: List of energy services provided by Implementors

Categories	Energy efficiency 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 energy efficient windows ▪ Installation of low-emissivity glazing or replacement of existing glazing with low-emissivity glazing ○ Doors ▪ Replacement of new doors with energy efficient doors ○ Airtightness ▪ Tapes in the new window installation ▪ Interior plaster ▪ Membranes (timber, steel construction) ▪ Seal all penetrations
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

Categories	Energy efficiency Measures
	Installation of systems for supervision, management and regulation of peak loads
HVAC	- Heating systems - Installation of thermostatic radiator valves - Installation of electronic wireless thermo-regulation 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 - Utilization of waste hot water energy - Cooling systems - Installation of air conditioning systems - Replacement of existing equipment with devices with higher efficiency - Installation of systems with higher efficiency (air-conditioning chambers) - Night cooling - Ventilation - Regulation of the system operation according to the required number of air exchanges - Installation of a centralized heat recovery ventilation unit - Installation of a de-centralized heat recovery ventilation units (push and pull) - Regulation systems - Installation of regulation systems depending on outdoor temperature - Installation of regulation systems depending on indoor temperature (thermostat)
Renewable systems	- Solar Thermal System - Application of heat pump systems - Low temperature heating system - Water/water - Ground sources – horizontal loops - Ground sources – vertical loops - Air/water - Air/air - High temperature cooling systems - Water/water - Ground sources – horizontal loops - Ground sources – vertical loops - Air/water - Biomass - Utilization of agricultural biomass in heating plants - Utilization of forest biomass in heating plants - Photovoltaic collectors - Installation of photovoltaic collectors - Microwind generation - Installation of microwind generation system
Implementation/technical studies	- Technical reports/ guidelines - Energy audits - Energy modeling/ simulations - Building benchmarking - Feasibility study - Life cycle cost analysis - Sustainability reporting
Quality Control on site	- Blowerdoor test - MVHR calibration and air flow measurement - Glass card/Lighter checking the glazing's coating - Infrared imaging

Categories	Energy efficiency Measures
	○ CE certifications of each material ○ Photos and documentation of technical details

Table 14: Zero Stage: Financier information

Information entries	Details	Explanation	Classification
I am a...	Dropdown menu: • Private Financing Body • Public Financing Body • Fund Manager • Investment Consultant • Private Investor • Other	"Financier" refers to the user that will use the platform to find energy efficiency projects to finance. Here, you can define your specific user role.	Mandatory
Looking to...	Tick the box: • Finance Energy Efficiency Projects	-	Optional
Interested in...	Tick the box: • EU taxonomy compliant project • Any project	Here, you can define whether you are interested in projects/ activities that are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts.	Optional

Table 15: Zero Stage: Public Body information

Information entries	Details	Explanation	Classification
I am a...	Dropdown menu: • Municipality • City • Region • Commune • Other	"Public Body" refers to the user that inserts the information of a public building needing renovation in the platform. Here, you can define your specific user role.	Mandatory
Looking for...	Tick the box: • Implementors • Financing	An Implementor = technical expert that can undertake the execution of the renovation. Financing = looking for a financial institution or body that is capable of investing in the renovation project.	Optional
Interested in...	Tick the box: • EU taxonomy compliant project offers • Any project offers	Here, you can define whether you are interested in projects/activities that are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts.	Optional

Table 16: Zero Stage: Information for all users

Information entries	Details	Classification
First name	Text field	Mandatory

Last name	Text field	Mandatory
Username	Text field	Mandatory
Email address	Text field	Mandatory
Password	Text field	Mandatory
Repeat password	Text field	Mandatory
Organisation name	Text field	Mandatory
Organisation address	Text field	Mandatory
Country	Text field	Mandatory
Corporate registration number	Text field	Optional
VAT number	Text field	Mandatory
Position in organisation	Text field	Mandatory

1

Choose your preferences

2

Basic Account Info

I am a...

User Role

Municipality
City
Region
Public Procurement Body
Commune
Other

Looking for:

☐ Implementors
☐ Financing

NEXT

Figure 13: Zero Stage user interface



2

Choose your preferences
Basic Account Info

First Name *

Last Name *

Username *

Email Address *

Password *

Repeat Password *

☐ I accept the [Terms and Conditions](#) *

Organisation Name

Organisation Address

Country

Corporate Registration Number

VAT Number

Position In Organisation

BACK

NEXT

Figure 14: Zero Stage user interface

4.2.2. Fetch Stage

During this stage, the users add the Building information (Building Owner for UC1, UC4 and UC9, Implementor for UC2, Public Body for UC5, UC6, UC7 and UC8).

Table 17: Building profile (private buildings)

Information entries	Details	Explanation	Classification
BUILDING DETAILS			
Building name	Text field	Add a name for your building. The name will be visible to users that match with it.	Mandatory
Building description	Text field	Add a brief description of your building. Click on the field to see an example.	Mandatory
Country	Dropdown menu - Greece - Italy - Spain - France - Austria - Latvia - Hungary	-	Mandatory
Province/region	Text field	-	Mandatory

Information entries	Details	Explanation	Classification
Climate zone	Text field	The climate zone depends on the location of the building.	Optional
I am the...	Tick the box • Owner • Renter	-	Mandatory
BUILDING TYPOLOGY			
Building type	Dropdown menu • Commercial building • Industrial building • Factory/manufacturing • Office space • Residential • Shared space • Accommodation/hotel/spa resort • Education facility • Healthcare facility • Sport facility • Other	Select the building typology that better describes your building.	Mandatory
TECHNICAL INFO			
Past interventions	Tick the box(es) See Table 13	Click on any measures that you have implemented in the past so that the Implementor can understand what your building might need.	Optional
Year of construction	Text field Number	-	Mandatory
Building size	Text field Number in m ²	-	Mandatory
Number of levels	Text field Number	-	Mandatory
Days of usage	Text field Number	Add the average days of usage per year.	Mandatory
Hours of usage	Text field Number	Add the average hours of usage per year.	Mandatory
Occupancy level	Text field Number	The occupancy rate is the ratio of used or rented space to the total amount of available space.	Mandatory
Current EPC level	Dropdown menu • A • B • C • D • E • F • G	EPC = Energy Performance Certificate, which is indicative of the current energy performance of your building.	Mandatory
Energy Performance Certificate	Upload		Optional

Information entries	Details	Explanation	Classification
ENERGY EFFICIENCY STATUS			
Type of heating (year installed – model)	Text field	Insert the type of heating system and the year it was installed	Mandatory
Type of cooling (year installed – model)	Text field	Insert the type of cooling system and the year it was installed	Mandatory
Electricity consumption	Text field Number in kWh/year	-	Mandatory
Heating consumption	Text field Number in kWh/year	-	Mandatory
Cooling consumption	Text field Number in kWh/year	Cooling consumption is often included in electricity.	Mandatory
PROJECT FINANCING			
Type of financing	Dropdown menu - No finance needed - Financed solution	No finance needed = You have your own financial resources to cover the costs of the project. You do not need a Financier. Financed solution: See Table 18.	Mandatory
ENERGY EFFICIENCY MEASURES PREFERRED			
See Table 13.			

Table 18: Financing methods

Information entries	Explanation
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, recouping the investments through 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.
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.

At this stage, the Building Owner will select the energy efficiency measures preferred.

If the building was added by an Implementor (UC2), then the Fetch Stage has been completed and the workflow moves on to the Process Stage.

If the building was added by a Building Owner (UC1 and UC4), the Building Owner will wait for an Implementor to make an initial offer. The initial offer contains the information presented in Table 19.

Table 19: Initial offer

Information entries	Details	Explanation	Classification
Offer for a walkthrough	Text field	Click on the field to see an example.	Mandatory
Other details	Text field	Click on the field to see an example.	Optional
Similar projects in your portfolio	Upload	Describe the type of building, the renovation measures, the energy savings achieved and the return on investment.	Mandatory
Technology/ type of measure	Dropdown menu See Table 13	-	Mandatory

If the initial offer is rejected by the Building Owner, the building will be able to continue to receive initial offers. If it is accepted, the workflow moves on to Process Stage (UC1, UC4).

Table 20: Building profile (public buildings)

Information entries	Details	Explanation	Classification
BUILDING DETAILS			
Building name	Text field	Add a name for your building. The name will be visible to users that match with it.	Mandatory
Building description	Text field	Add a brief description of your building. Click on the field to see an example.	Mandatory
Project link	Text field	Add the link to your project so that users can access more information about it.	Mandatory
Country	Dropdown menu - Greece - Italy - Spain - France - Austria - Latvia - Hungary	-	Mandatory
Province/region	Text field	-	Mandatory
Climate zone	Text field	The climate zone depends on the location of the building.	Optional
BUILDING TYPOLOGY			
Building type	Dropdown menu Public building	Select the building typology that better describes your building.	Mandatory

Information entries	Details	Explanation	Classification
	- Office space - Social housing - Shared space - Education facility - Healthcare facility - Sports facility - Other		
TECHNICAL INFO			
Past interventions	Tick the box(es) See Table 13	Click on any measures that you have implemented in the past so that the Implementor can understand what your building might need.	Optional
Year of construction	Text field Number	-	Mandatory
Building size	Text field Number in m ²	-	Mandatory
Number of levels	Text field Number	-	Mandatory
Days of usage	Text field Number	Add the average days of usage per year.	Mandatory
Hours of usage	Text field Number	Add the average hours of usage per year.	Mandatory
Occupancy level	Text field Number	The occupancy rate is the ratio of used or rented space to the total amount of available space.	Mandatory
Current EPC level	Dropdown menu - A - B - C - D - E - F - G	EPC = Energy Performance Certificate, which is indicative of the current energy performance of your building.	Mandatory
Energy Performance Certificate	Upload		Optional
ENERGY EFFICIENCY STATUS			
Type of heating (year installed – model)	Text field	Insert the type of heating system and the year it was installed	Mandatory
Type of cooling (year installed – model)	Text field	Insert the type of cooling system and the year it was installed	Mandatory
Electricity consumption	Text field Number in kWh/year	-	Mandatory
Heating consumption	Text field Number in kWh/year	-	Mandatory
Cooling consumption	Text field Number in kWh/year	Cooling consumption is often included in electricity.	Mandatory
PROJECT IMPLEMENTATION & FINANCING			

Information entries	Details	Explanation	Classification
Projects' implementation & costs	An Implementor has already undertaken this project: • Yes • No <i>Tick the box</i> <i>Pop-up question if the user selects "yes":</i> Please specify (text field) <i>Pop-up question if the user selects "no":</i> The project costs are expected to... • Be below the tender threshold • Be above the tender threshold <i>Tick the box</i>	If an Implementor has already undertaken the project, it is assumed that you are not looking for technical support in the platform, and that you are looking for finance. Therefore, you may explore the available EU funding mechanisms, the financing options that Financiers have added in the platform, and you may notify Financiers in the platform that you are looking for finance (for the whole project or part of it). If on the other hand you have not identified an Implementor, it needs to be specified whether or not the project exceeds the tender threshold. If the project is below the threshold, you will be able to receive offers from Implementors in the platform. If that is not the case, Implementors in the platform will be able to see the project, but if they are interested, they can only proceed with the public procurement.	Mandatory
Type of financing	Dropdown menu • No finance needed • Financed solution • EU funding • Other financing options • Notify Financiers in the platform. <i>Please specify the following information:</i> ○ Total investment needed (text field) ○ Percentage covered by other sources (text field) ○ Available subsidies (text field)	No finance needed: You have your own financial resources to cover the costs of the project. You do not need a Financier. Financed solution: Through the public procurement process that you have announced or will announce, you would like to receive financed solutions, meaning that the Implementors that are going to apply to it will also undertake the financing. By selecting this, you will allow Implementors in the ENERGATE platform to be matched with Financiers in the platform that are interested in your project. EU funding: See Table 21. Other financing options: These options have been added by Financiers that are using the ENERGATE platform. Notify Financiers in the platform: If you select this, you will be able to receive financial offers through the platform.	Mandatory
PREFERRED MEASURES			
See Table 13.			

Table 21: EU Funding options

Financing option	Type	Investment cost	Building types & measures
ERDF (European Regional Development Fund)	Grant	Up to 100% investment	All

ESF+ (European Social Fund Plus)	Grant	50-90%	• Municipal buildings (with services like employment centers, training programs, or social inclusion initiatives.) • Social housing (if linked to social support services/ housing of vulnerable groups) • Shared space (If used for training, social programs, or community engagement) • Healthcare facility • Sports facility (if used for social inclusion, youth engagement, or reintegration of disadvantaged populations)
Public Sector Loan Facility (PSLF) under Just Transition Fund (JTF)	Loan, EU – national cofinancing, Public private partnership	For direct loans from the European Investment Bank (EIB), the minimum loan amount is €12.5 million. For loans provided through EIB financial intermediaries, the minimum loan amount is €3 million. The EIB loan (EUR 12.5 million) usually covers 50 % of the total project costs, which should therefore be at least EUR 25 million. The EIB may decide to apply a higher financing rate (over 50 %) for projects in less developed and transition regions.	ALL
EAFRD (European Agricultural Fund for Rural Development)	Grant	50-95%	All, in rural areas
CEF (Connecting Europe Facility)	Grant	Up to 50%	All buildings, energy efficiency measures related to renewables
REFM (Renewable Energy Financing Mechanism)	Grant		All buildings, energy efficiency measures related to renewables
EEEF (European Energy Efficiency Fund)	Loan Public – private partnership	5 million to 25 million EUR.	All
ELENA (European Local Energy Assistance)	Grant	Up to 90%	All
RRF (Recovery and Resilience Facility)	Grant, EU national cofinancing	Up to 100%	All

Table 22: EU Funding options – objectives

Objectives	ERDF	ESF+	EAFRD	PLSF	CEF	REFM	EEEF	ELENA	RRF
Supporting innovation	√								
Supporting digitisation	√			√					√
Supporting SMEs	√								
Promoting green development	√						√	√	√
Adopting low carbon approaches/ technologies	√						√	√	
Enhancing resilience	√								√
Supporting effective and inclusive employment	√	√							
Supporting social inclusion	√								
Facilitating equal access to healthcare	√	√							
Enhancing the role of culture	√								
Enhancing the role of sustainable tourism	√								
Supporting sustainable urban development	√								
Quality and inclusive education		√							
Facilitation of integration of marginalised groups (e.g. migrants)		√							
Social integration of people at risk of poverty		√							

Achieving balanced development of rural economies/ communities	√								
Promoting renewable energy production				√	√	√	√	√	
Energy efficiency and integration measures				√			√	√	
Renovations and conversions of buildings				√			√	√	

[BUILDING DETAILS](#)
[BUILDING TYPOLOGY](#)
[TECHNICAL INFO](#)
[ENERGY EFFICIENCY STATUS](#)
[PROJECT FINANCING](#)
[PREFERRED MEASURES](#)

Main building information

Building Name *

Building Description *

Country

Province / Region *

Climate Zone

I am the...

☐ Owner

☐ Renter

BACK NEXT

Figure 15: Fetch Stage user interface: building information

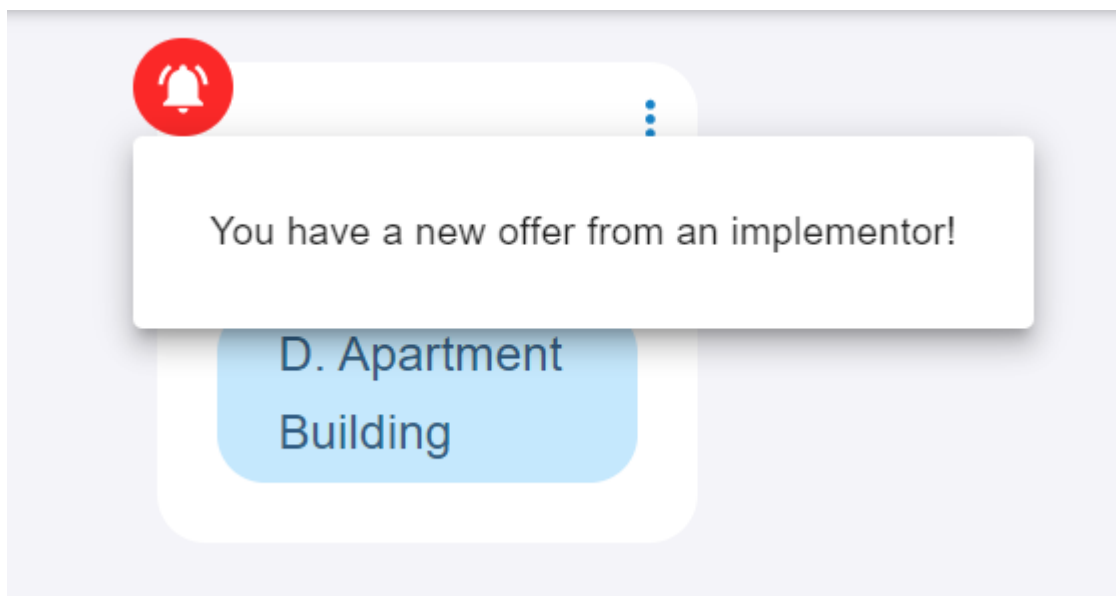


Figure 16: Fetch Stage user interface: notification

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 17: Fetch Stage user interface: initial offer

4.2.3. Process Stage

In the process stage, the Implementor needs to finalise the offer of the building (applicable only for private buildings: UC1, UC2, UC4). Not all the elements will be available to both the Financiers and the Building Owners (see the last column of Table 23).

Offer finalisation

Table 23: Finalised offer

Information entries	Details	Explanation	Classification	Visible to...
Project details for which finance is needed	Text field	Provide a brief description of the project. Click on the field to see an example.	Optional	Building Owners, Financiers
Pipeline Size	Text field Number (euros)	The pipeline size for energy efficiency projects refers to the total value or number of projects that are planned, under development, or ready for execution. It reflects the market potential and readiness for investment in energy-saving initiatives.	Optional	Financiers
Energy savings assessment (per measure category)	Text field Number (kWh/year)	Please provide the annual electricity savings that you estimate will be resulted by the renovation in kWh/year.	Mandatory	Financiers
		Please provide the annual thermal savings that you estimate will be resulted by the renovation in kWh/year.		Financiers
Total energy savings (sum of the inputs above)				Financiers, Building Owners
Estimated CO2 Abatement	Text field Number (tCO2/year)	Calculate the CO2 savings. You may use the official conversion factors that are applicable in the country of the building.	Mandatory	Financiers, Building Owners
Measurement and Verification Protocol	Upload	Upload your measurement and verification protocol	Mandatory	Financiers, Building Owners
Energy Class After implementation	Text field A, B, C etc.	Estimate the new energy class of the building as a result of the measures applied.	Mandatory	Financiers, Building Owners
Reduction in O&M costs (per measure category)	Text field Number (euros)	Add any estimated reduction in costs for the operation and maintenance of the equipment as a result of the measures applied (on a yearly basis).	Mandatory	Financiers
CAPEX (per measure category)	Text field Number (euros)	The capital expenditure required for the implementation of the measures.	Mandatory	Financiers
Investment-Upfront payment needed	Text field Number (euros)	The initial investment or upfront payment required to start the project (covered by end client).	Mandatory	Building Owners
Avoidance Cost (per measure category)	Text field Number (euros/kWh) Also calculated by the platform	Expresses the average cost of an intervention for each kWh of energy saved.	Mandatory	Financiers
Payback Period (per measure category)	Text field Number (years)	Expresses the number of years required to recover the investment.	Mandatory	Financiers, Building Owners

Information entries	Details	Explanation	Classification	Visible to...
	Also calculated by the platform			
IRR (per measure category)	Text field Number (percentage %) Also calculated by the platform	The annual rate of growth that an investment is expected to generate. IRR represents the rate at which the net present value of cash flows from an investment equals zero.	Mandatory	Financiers
NPV (per measure category)	Text field Number (euros) Also calculated by the platform	The net present value of the projects, representing the difference between the present value of cash inflows and outflows over the project's lifetime.	Mandatory	Financiers
Is the proposed project EU taxonomy compliant?	Tick the box • Yes • No • Not known Pop up with more information & calculator. Upload.	Clarify whether proposed activities are covered by the EU Taxonomy and comply with the criteria set in the Taxonomy delegated acts. Upload EU Taxonomy alignment assessment, e.g. completed templates provided by the Disclosures Delegated Act for the purpose of identifying Taxonomy-eligibility and alignment, along with calculated KPIs.	Optional	Building Owners, Financiers
Access to subsidies	Tick the box • Yes • No Text field appears if "yes" is clicked.	If you have access to subsidies, please enter the percentage of the total investment you plan to cover with your own funds. If no subsidies are available, this field is not required.	Optional	Building Owners, Financiers
Final offer for the project	Free text field	Add the information related to the final complete financial offer (e.g. total CAPEX and OPEX etc.)	Optional	Building Owners, Financiers
Type of contract proposed	Dropdown menu	See Table 24.	Optional	Building Owners, Financiers
Upload Certificate, Insurance, Construction Permit (optional), Energy Audit etc.	Upload	-	Optional	Financiers
Stage of the project	Dropdown menu • Implementation • Completed • Incipient / design	-	Optional	Financiers

Information entries	Details	Explanation	Classification	Visible to...
Construction Finance	Dropdown menu • Bridge loan • Own funds • Other	Specify the finance that they have for the construction phase. e.g. to apply for building permits, feasibility study, etc. See Table 25.	Optional	Financiers
Yield	Text field Percentage (%)	Yield refers to the income generated from an investment, expressed in annual percentage rate/or simply percentage.	Optional	Financiers
Contribution by end client	Text field Percentage (%)	Percentage asked from the client in terms of contribution from the overall cost of the project.	Mandatory	Financiers

Table 24: Type of contract proposed

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 25: Construction finance

Construction Financing options	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.

The calculation used to estimate the economic indicators of the offer are provided in the previous version of the deliverable.

Risk assessment protocol

Optionally, the Implementor may provide the following inputs, to enable the risk assessment of the project:

Table 26: Risk assessment protocol input

Risk factor	Explanation	Rating
Credit risk	This risk refers to the likelihood that the end client (beneficiary) may fail to meet financial obligations. Assessing this risk may involve	Slider, indicating that:

Risk factor	Explanation	Rating
	evaluating the client's financial health—such as income, debt levels, and payment history. This is important to secure investor confidence.	<i>The probability of this risk affecting the project is:</i> - Extremely low - Very low - Low - Medium - High - Very high - Extremely high
Technical risk	This risk stems from the complexity of implementing energy efficiency technologies. The more technically complex a solution is, the higher the chance it may not function as expected, potentially leading to underperformance or failure to achieve projected energy savings.	
Performance risk	Performance risk arises from inaccurate energy savings forecasts or poorly defined consumption baselines. It also includes rebound effects, where lower energy costs lead to increased usage, reducing actual savings. These inaccuracies can undermine the effectiveness of energy efficiency projects.	
O&M risk	O&M risk involves the uncertainty of equipment being properly operated and maintained. Poor maintenance can reduce equipment efficiency and compromise energy savings. Regular audits and monitoring are essential to ensure continued performance throughout the project lifecycle.	
Low quality equipment/ poor project design	This risk refers to failures caused by substandard equipment or flawed design. Even high-quality equipment can underperform if poorly implemented. Risks often stem from lack of expertise, inadequate planning, or unclear responsibilities among project stakeholders.	
Pipeline risk	Pipeline risk occurs when a financial product's terms are agreed upon, but the client retains the option to cancel the transaction. This creates pricing and revenue uncertainty during the origination process, potentially impacting profitability and resource allocation.	
Prepayment risk	Prepayment risk involves the early repayment of loans or fixed-income securities, especially in callable bonds or mortgage-backed securities. This can affect expected returns and disrupt investment strategies, particularly when interest rates fluctuate or borrowers refinance.	
Management risk	Management risk arises from poor leadership or decision-making within a company. Ineffective or unethical management can lead to financial underperformance, legal issues, or reputational damage, significantly affecting investors and stakeholders.	
Occupancy risk	Occupancy risk relates to unpredictable usage patterns by building occupants, which can affect energy consumption and compromise projected savings. Variations in behavior, schedules, or building use can lead to discrepancies between expected and actual energy performance.	
ESRS risk	ESRS risk includes environmental, social, and governance challenges that can impact a company's operations, reputation, and financial health. Non-compliance or mismanagement in these areas can lead to legal penalties, public backlash, and reduced investor confidence.	
Regulatory risk	Regulatory risk is the risk that a change in regulations or legislation will affect the energy efficiency project. Companies must abide by regulations set by governing bodies that oversee their industry. Therefore, any change in regulations can cause a rippling effect across an industry.	
Market risk	The weak economic environment is related to poor economic conditions in the country that the energy efficiency investment takes place. It is connected to, among other indicators, interest rates, inflation, availability of finance. A weak economic environment can negatively influence the investment in many ways, affecting the	

Risk factor	Explanation	Rating
	investment's profitability through inflation or KPIs through interest rates.	
Volatility of energy prices	Energy prices volatility is related to the uncertainty of energy prices and influences the decision to undertake an energy efficiency investment, leading to uncertainty about monetary savings and returns.	
Currency risk	Currency risk is commonly referred to as exchange-rate risk. It arises from the change in price of one currency in relation to another. Investors or companies that have assets or business operations across national borders are exposed to currency risk that may create unpredictable profits and losses.	

The output of this questionnaire is a classification of the project as “LOW”, “MEDIUM” or “HIGH” risk. The detailed risk assessment protocol is available in the previous version of the deliverable.

Internal Risks

Credit Risk



Technical Risk



Performance Risk



Figure 18: Risk assessment protocol questionnaire example (mockup)

Aggregation and matchmaking process

When the Implementor has completed several offers, he/she can proceed to aggregate buildings in order to create an attractive investment package for the Financiers in the platform.

The platform can group the buildings according to the filters shown in Table 27.

Table 27: Aggregation information entries

Aggregation process filters
Group by Building Owner
Group by country
Group by energy efficiency measures
Group by building typology
Group by type of finance

Group by risk profile

These filters allow the Implementor to detect similarities between the projects and this helps him/her with the decision-making process of creating a cluster.

At this stage, the Implementor has fully defined the energy efficiency project and it will now appear to the Financier.

Table 28: Matchmaking information entries

Matchmaking filter	Input
Country	Tick the boxes • Greece • Italy • Spain • France • Austria • Latvia • Hungary
Financing type	Tick the boxes • As a service • Energy Performance Contract • Operating lease • Power Purchase Agreement • Other
Building Typology	Tick the boxes • Commercial Building • Municipal Building • Industrial Building • Factory / Manufacturing • Office Space • Residential • Shared Space • Accommodation / Hotel Spa Resort • Education Facility • Healthcare Facility • Sport Facility • Other
Energy efficiency measures	Tick the boxes • Building envelope • Lighting • Automation • HVAC • Renewable systems
Minimum IRR	Text field Percentage (%)
Max payback time	Text field Number (years)
Minimum project size	Text field Number (euros)
Maximum investment	Text field Percentage (%)

Matchmaking filter	Input
Investment along subsidies	Tick the box • Yes • No

Another service provided to the Financier is the prioritisation of projects based on the filters in Figure 19.

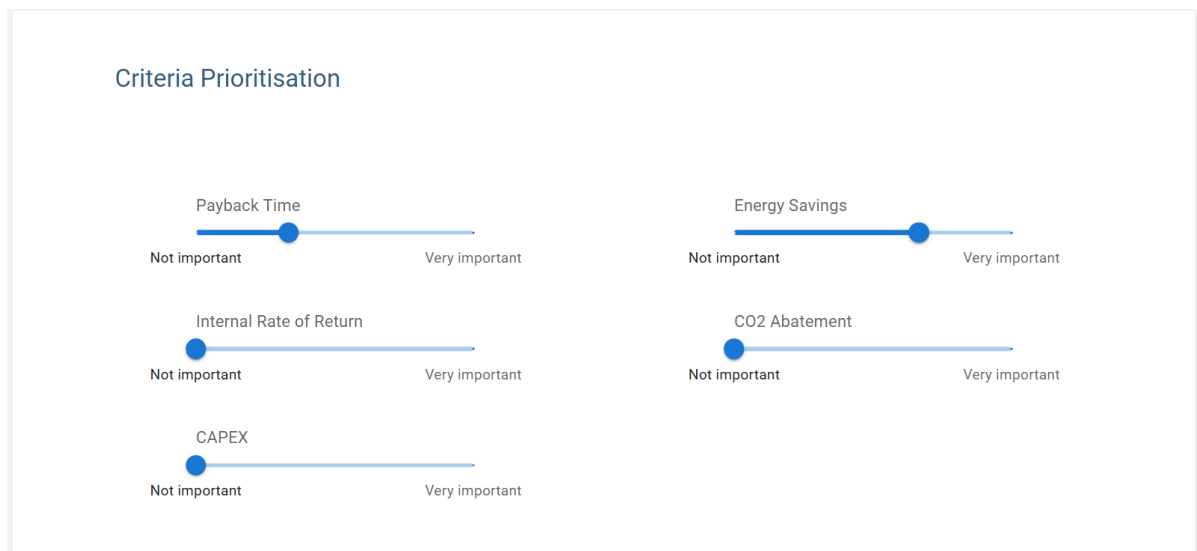


Figure 19: Process Stage user interface: prioritisation filters

When a Financier selects a project, he/she will be able to upload a term sheet, and the Implementor will be notified.

Another service that has been added to the Financier profile is the definition of a “financing option”, that Building Owners can see on their profiles.

Table 29: Matchmaking information entries – financing option

Information entries	Details	Explanation	Classification
Financing option name	Text field	Add a name for your financing option. The name will be visible to users that could match with it.	Mandatory
Description	Text field	This will be the first thing the user will see before clicking on the financing option.	Mandatory
Financing option type	Dropdown menu: • Loan • Green loan • Mortgage • Green mortgage • Green bond • Other (please specify)	-	Mandatory
For projects in	Dropdown menu: • Private buildings • Public buildings	-	Mandatory

Information entries	Details	Explanation	Classification
	Building types: • Commercial building • Industrial building • Factory/manufacturing • Office space • Residential • Shared space • Accommodation/hotel/spa resort • Education facility • Healthcare facility • Sport facility • Other		
Energy efficiency measures covered	Tick the boxes • Building envelope • Lighting • Automation • HVAC • Renewable systems	-	Mandatory
Minimum investment covered	Text field	Minimum amount of money that can be provided to the Building Owner	Mandatory
Maximum investment covered	Text field	Maximum amount of money that can be provided to the Building Owner	Mandatory
Relevant link	Text field	Provide link to the financing option (e.g. banking product), if available	Optional
Percentage of total investment covered	Text field	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.	Optional
Tenure	Text field	Specify in how many years the debt should be repaid	Optional
Interest rate	Text field	-	Optional
Countries	Dropdown menu: • Greece • Italy • Spain • Latvia • Austria • France • Hungary	Specify in which country/ies the financing option can be provided	Mandatory

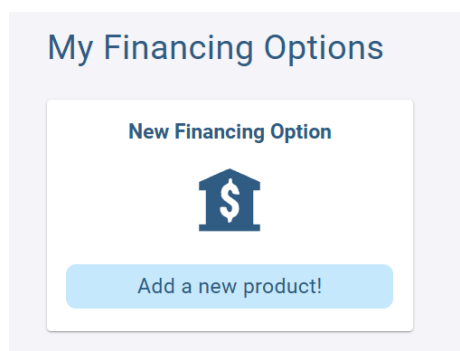


Figure 20: Process Stage user interface: addition of financing option

In the framework of the matchmaking process, the Financiers could also select from the following list of requirements, the information that they will need from the end client to proceed with their negotiations and agreement:

- Company registration and VAT number (available from Zero Stage)
- Full Audited Accounts for the last 3 years or simplified depending on the case (P/L, Balance sheet)
- Recent tax compliance not older than 3 months
- Years of Market experience (info already on the platform on the Implementor's profile)
- Years of Tech experience (info already on the platform on the Implementor's profile)
- Potential pipeline size (info already on the platform on the Implementor's offer)
- Sustainability criteria: ESRS compliance i.e. certifications, impact report, KPIs reporting

4.2.4. Deliver Stage

The Deliver Stage will ensure effective monitoring of project results and profile analysis.

Table 30: Deliver Stage information entries

Information entries	Explanation
Energy consumption before renovation (hourly data)	The energy consumption will be provided depending on data availability. If data are not available, simulations will be used to estimate the baseline consumption. These simulations will be based on the synergies that ENERGATE has established with other projects. To be able to simulate the consumption, the service will need specific building characteristics as input.
Energy consumption after renovation (hourly data)	These data will be provided depending on the measurement and verification protocol. Estimations/ predictions on energy consumption will also be provided according to the integrated services from the MATRYCS project.

Annual energy consumption before and after renovation	The yearly savings will be monitored and benchmarked.
Annual CO2 emissions before and after renovation	The yearly savings will be monitored and benchmarked.
New EPC level	The EPC level after the renovation is estimated during the completion of the offer at Fetch Stage, but the actual result will be reported in Deliver Stage.
Financial performance	The financial performance of the project will be monitored through: - Relevant KPIs: cost savings, IRR, NPV, payback time, ROI - Projected and actual cash flows
Comfort level	Comfort levels will also be monitored based on indoor/outdoor temperatures and humidity levels, if such sensors and data are available. Synergies with other projects (e.g. DigiBUILD) will also be exploited in this aspect.
Other non – energy benefits	Benefits related to health, accessibility, social impact, will be monitored through the established relevant frameworks and certifications, if applicable. Such certificates might include: - BREEAM - WELL Building Standard - LEED Other non – energy benefits that could be included in the Deliver Stage could be the increase of asset value, the jobs created, as well as the impact of the renovation on the building's SRI.

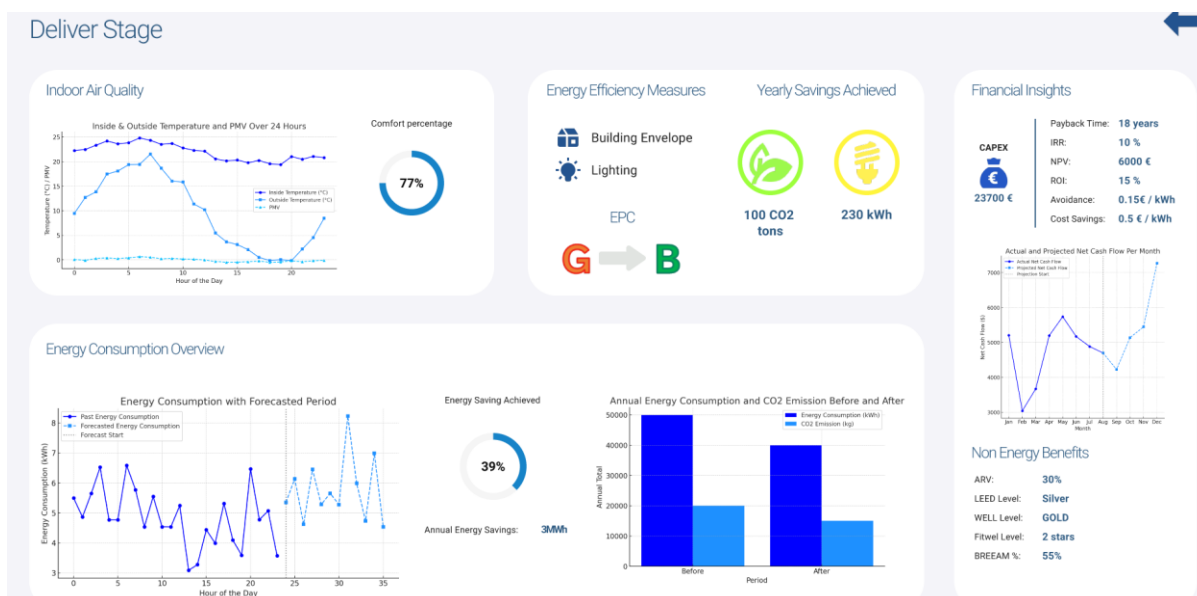


Figure 21: Deliver Stage Overview: Mockup

Another part of the Deliver Stage is the user performance feature. The inputs and outputs of the feature are described below:

Table 31: User performance feature: Building Owner

Metric	Explanation	Output
Number of buildings	The Building Owner will receive badges depending on the number of buildings they have inserted into the platform.	3 types of badges depending on the amount of buildings: 5, 10, 20+ (bronze, silver, gold)
New building	Each time a Building Owner adds a new building, it will update the ranking of the Building Owner compared to other Building Owners in the platform, with respect to the total number of buildings inserted	1 type of badge depending on the top 5%, top 10% or top 20%
Potential Implementors	When a Building Owner adds a building in the platform, he/she waits to receive an offer by an Implementor. In the meantime, it would be encouraging to know if there are Implementors in the platform that might match with the building.	Notification displayed once a building matches with Implementors preferences. Demonstration of total number of Implementors that are a potential match.

Table 32: User performance feature: Implementor

Metric	Explanation	Output
Number of offers (in their own buildings)	The Implementor will receive badges depending on the number of offers they have created in the platform for buildings that have uploaded.	3 types of badges depending on the amount of offers: 30, 40, 100+ (bronze, silver, gold)
Number of offers (in third party buildings)	The Implementor will receive badges depending on the number of offers they have created in the platform for buildings they have been matched with.	3 types of badges depending on the amount of offers: 30, 40, 100+ (bronze, silver, gold)
Cost effective offer	The Implementor that will add the most cost-effective offer in a specific category of measures will receive an award as a positive output. The cost – effectiveness is measured through the maximisation of energy savings and minimisation of CAPEX.	Notification: “You have the most cost – effective offer in the platform for ...” • Building Envelope • Lighting • Heating, Ventilation and Cooling (HVAC) etc • Renewable systems
Rate of acceptance of offers	This field helps Implementors understand the success rate of the matchmaking between them and Building Owners.	Notification every time an offer is accepted: “Your acceptance rate is ...%”

Table 33: User performance feature: Financier

Metric	Explanation	Output
Rate of acceptance of term sheets	This field helps Financiers understand the success rate of the matchmaking between them and the projects.	Notification every time a term sheet is accepted: “Your acceptance rate is ...%”
Number of clusters	This field aims to incentivise Financiers to invest in clusters of buildings.	Notification every time a match with a cluster is achieved: “You have provided term sheets with ... clusters”
Geography covered	This field aims to incentivise Financiers to invest in multiple countries.	Notification: “Congratulations! Your term sheets have been accepted in ... countries”
Number of buildings matched with	This field is related to UC9 and will demonstrate the popularity of a financing	3 types of badges depending on the amount of buildings: 5, 10, 20+ (bronze, silver, gold)

**financing
option**

option added by the Financier for Building Owners.

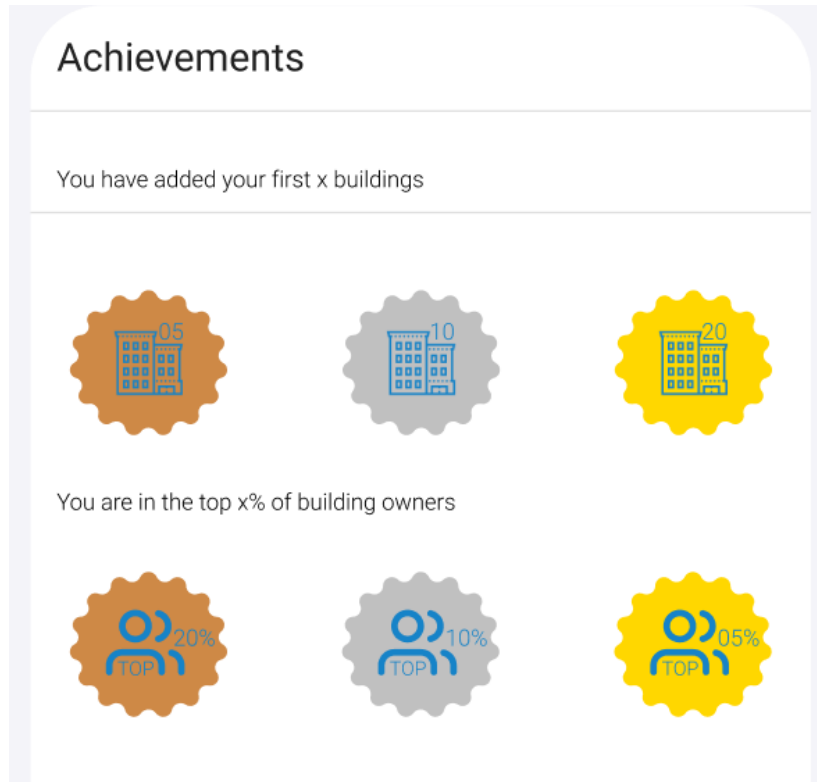


Figure 22: User Performance Feature – User Interface

5. Stakeholder Suggestions and Integration in the Workflow

In the previous version of the report⁵, Section 5 “Stakeholder Consultation: Key Takeaways” presents an overview of the suggestions of the stakeholders with regards to the platform’s workflow, the adjustments that were planned to accommodate them, and their stage of development.

In this deliverable, these suggestions are updated, as shown in Tables 34 to 36. Most of the platform’s adjustments are either already implemented or currently under development. 15 new suggestions emerged from the stakeholder consultation activities that took place during the last months, such as the [3rd Regional Training Workshop in Turin, Italy](#) and the [Greek National ENERGATE Workshop](#), ENERGATE’s participation in key physical and online events/ expos including the [Verde-tec exhibition](#), [World Sustainable Energy Days 2025](#), [MIPIM](#), [SEFA Sustainable Energy Day Workshop](#), [EEMI Sustainability and Digitalisation Pavilion](#), as well as the continuous bilateral and multilateral meetings, with Building Owners, Implementors, Financiers and Public Bodies.

Table 34: Definition of stakeholder suggestions’ integration stages

Stage of integration	Explanation
Under discussion	It is still explored whether the feedback will be incorporated within the project’s duration or will be part of the post project exploitation.
Under design	The feedback received has been discussed within the consortium and an initial high – level approach has been decided so as to address it. The specific elements are still explored (e.g. the steps of a use case are defined but the partners have not decided the final information entries for it).
Under development	The methodological approach to integrate the suggestion of the stakeholders has been partially or fully designed and the development of the relevant service, feature or use case is ongoing.
Developed	The service, feature or use case that was designed based on the suggestions of the stakeholders has been fully developed, is operational but is not yet integrated in the platform (e.g. because it is still in a testing phase or because it has not been decided how the inputs and outputs will appear in the platform’s frontend).
Implemented	The feedback received has been translated into a service, feature or use case, and it is fully designed, developed, and integrated into the platform, publicly accessible by the users.

Table 35: Overview of stakeholder suggestions and platform adjustments – updated

Stakeholder suggestion/ remark	Platform adjustment	Stage of integration
S1 Difficulties convincing users to provide confidential or private information and documents on the platform as part of the Due Diligence.	The platform provides matchmaking, the Due Diligence is the responsibility of the users and happens outside the platform.	Implemented
S2 The values are user – defined and there is no verification mechanism to ensure that the metrics are realistic.	Calculations of financial indicators through the platform have been added as a verification mechanism.	Implemented

⁵ <https://energate-project.eu/sites/default/files/results/D25-RE-1.pdf>

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
		A dedicated page in the platform will describe the processes behind the services, so as to enhance transparency on the platform's outputs.	Developed
		A synergy with the DEEP - De-risk Energy Efficiency Platform has been established to enable benchmarking with aggregated data from the DEEP database.	Developed
		A methodology for data validation has been developed within the framework of pilot assessment ⁶ , which will also be automated and integrated in the platform.	Under development
S3	Certain financiers (especially banks) might be unwilling to share the terms of the agreement through the platform.	The term sheet that is uploaded by the financiers in the platform is a pdf file, which provides flexibility.	Implemented
		The use case UC9 enables banks to have an alternative approach, where they are notified by Building Owners interested in receiving financing, and therefore they do not have to share the terms of the agreement through the platform.	Implemented
		The Financiers will now be able to select from a predefined list of requirements the information and documentation that they will need from their end clients in order to proceed with the Due Diligence. However, the Due Diligence will still be completed outside of the platform (see S1).	Under development
S4	It is not always clear what type of input is needed in each field.	Explanations for each field are provided as a tooltip. The fields are also categorised as mandatory and optional.	Implemented
S5	It is difficult for a technical expert to estimate energy savings without having actually visited the building.	The offer is divided into two stages. The initial offer is very general and includes details of a walkthrough, if needed.	Implemented
S6	The public buildings cannot follow the same workflow as private buildings, since there are strict procedures in the public sector that are related to the need or not of public procurement processes.	A separate "Public Body" profile has been created.	Implemented
S7	Large scale projects are of greater interest. The platform can act as an aggregator to offer clusters of similar projects.	Filters are provided to help Implementors aggregate projects based on similarities.	Implemented

⁶ Deliverable D4.2 "Pilot Projects Reports Including Aggregates-v1"

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
S8	It would be beneficial to have the possibility to directly connect Building Owners and Financiers, especially in the case of banks.	UC9 enables this connection through the financing options that the Financier adds.	Implemented
S9	Assessing the risk is important, but the majority of financiers relies mainly on their own risk assessment protocol.	The risk assessment protocol (using experience of the Triple-A and LAUNCH project) of ENERGATE results in a qualitative result that helps Implementors manage the project risk.	Developed
		Suggestions to mitigate the risk could also be provided.	Under design
S10	When the Energy Performance Certificate is available, it is very useful and could be uploaded.	There is an optional field to upload the Energy Performance Certificate.	Implemented
S11	It would be useful to be able to learn from best practices from previous projects.	The ENERGATE database is used to find similar buildings and show key information.	Implemented
		A machine learning algorithm is used to estimate the impact of different energy efficiency measures.	Implemented
		A synergy with the Enershare project is examined, to integrate a service providing recommendations for energy efficiency measures.	Under design
S12	A profile analysis of the users would be useful.	The user performance feature will provide the profile analysis, offering insights into user behaviour, activity patterns, and overall engagement	Implemented
S13	There are different types of stakeholders involved in the design and execution of energy efficiency projects that have different roles. They often need to cooperate.	These suggestions will be addressed by extending the list of services that the Implementors can provide, so that besides energy efficiency measures, the list includes technical studies, certifications and so on.	Under development
S14	The municipalities might use the platform to connect with organisations that can provide technical studies and/or guidance.		
S15	The municipalities are often not aware of all the EU funding mechanisms for energy efficiency projects or are not familiar with the different databases that exist.	A library of EU funding mechanisms and relevant information is provided on the platform.	Implemented
		The users can apply filters to find the most suitable funding mechanisms.	Under development
S16	Fund managers could use the platform as an additional communication channel for the available funding sources.	Fund managers can insert information about funding sources in the platform, which are then available to Public Bodies (UC5).	Implemented.
S17	The Public Bodies might need assistance in assessing their suitability to apply to different available mechanisms.	The users will be able to apply filters to find the most suitable funding mechanisms (see S15).	Under development
S18	A bank could use the platform as an additional communication channel to inform potential clients about financing tools and products.	The Financier's profile can be used to add funding options in the platform which are then available to Building Owners.	Implemented

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
S19	A list of available funding for private buildings could also be useful.	The Building Owners can access the list of available funding options that have been	Implemented
S20	Banks (especially in the Greek market) often work with subsidies.	Through UC9, the banks will be able to add their financing tools that are based on national subsidies and inform their Building Owners about them.	Implemented
S21	It would be good to provide information such as energy predictions, statistics and visualised results.	Synergies with projects such as MATRYCS and follow-up projects (e.g. Digibuild , MODERATE , ReLIFE etc.)	Under development
S22	Users are concerned about the privacy of their data, the management of the data etc.	The terms and conditions and the privacy policy of the platform are publicly available and clearly state all relevant information.	Implemented
		Different scenarios are being examined so as to verify the identity and authorisation of the user upon registration, such as the use of standard documents to confirm that the user is an authorised representative from the specific company or the automatic checking of the VAT.	Under development
S23	The financiers might need additional information/files such as the business plan, certifications, insurances etc. to be able to evaluate an energy efficiency project.	A free upload field is available so that such files can be uploaded.	Implemented
S24	Social aspects and additional non – energy benefits could also be important to evaluate an energy efficiency project.	The incorporation of non – energy benefits will be correlated to established relevant certificates. ⁷	Under development
S25	EU taxonomy metrics could be included in the project offer.	Information on compliance with EU taxonomy will be provided to the users at various stages.	Under development
S26	The projects could be prioritised based on their performance on the defined criteria.	A methodology to rank the projects is available in the matchmaking module based on multicriteria assessment.	Implemented
S27	Compliance with EU taxonomy is a very strong incentive to invest in a project.	The platform will provide support to guide users with regards to the EU taxonomy.	Under development
S28	Apart from the Internal Rate of Return (IRR), payback time etc. there are other indicators such as the Net Present Value (NPV) that are important.	The financial KPIs have been enriched.	Implemented
S29	Some ESCOs have already established relationships with financial institutions.	It is not mandatory to find finance through the platform, an “Implementor” can simply enter to find clients.	Implemented

⁷ Some of them are already defined in D4.2 “Pilot Projects Reports Including Aggregates-v1” and will be finalised by the time that the final version of the report will be released.

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
S30	The Financiers could receive notifications when a project on the platform fits their criteria.	The Financiers will be able to receive notifications through the financing options that they add in their profiles.	Implemented
S31	The real estate companies with large portfolios might be able to define the KPIs of the project without the assistance of an Implementor.	The real estate companies can register as Implementors.	Implemented
S32	Real estate companies with large portfolios might want to aggregate their own buildings without the involvement of an Implementor as an aggregator.		
S33	The Financiers might use platform services to evaluate project clusters.	An available tool from the MATRYCS project, which is based on a state-of-the-art machine learning approach and data from previously implemented energy efficiency projects, has been integrated in the Financier's profile, classifying the clusters of buildings in "Class A", "Class B", "Class C" depending on their potential.	Implemented
S34	Users and visitors of the platform might be interested in exploring aggregated statistics of the energy efficiency projects that have been financed or are looking for finance through the platform.	This feature will be made available once a sufficient number of projects have been added into the platform and could include metrics such as total size of the buildings, total number of users etc.	Under design
S35	The Building Owners that have available detailed data on energy consumption before renovation (e.g. hourly or half hourly data for the past year) could mention it.	The availability of such data would be of great help for the Measurement and Verification (M&V) of energy savings.	Under development
S36	A lot of stakeholders, particularly Public Bodies in Greece, have declared that the platform would facilitate their work if the platform was translated in their native language.	Translation of the platform (starting with Greek) might be implemented either within the project's duration or after the project's end as part of the sustainability strategy.	Under discussion
		Users can choose to have the page automatically translated by their browser.	Implemented
S37	It is good to be transparent when it comes to the platform's services, i.e. to explain how certain outputs are estimated or calculated.	A dedicated page will be incorporated in the platform explaining all the decision support services with links to the respective project deliverables.	Under development
S38	Big municipalities, such as the Municipality of Athens, might have difficulties with regards to keeping track and mapping the needs of their buildings in terms of energy efficiency, and conducting technical studies, because of the great number of buildings in the municipality.	The UC6.B and the updated list of services that can be provided by Implementors through the platform will allow matchmaking that will facilitate this process.	Under development
S39	A lot of financing mechanisms for Public Bodies do not cover all of the investment, instead they cover a specific percentage.	The Public Bodies could use the platform to look for the remaining finance (UC8).	Under development

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
S40	The municipalities face difficulties with regards to the bureaucratic processes that they need to follow to access finance.	UC9 allows public fund managers to specify the requirements to provide the funding options that they propose.	Implemented
S41	The list of services of Implementors could be extended in order to include renovation measures that can transform a building so as to become a passive house/building.	The ENERGATE team is in close collaboration with the Hellenic Passive House Institute to determine specific measures that could be included in the list.	Under development
S42	Some energy efficiency measures should always be implemented in parallel.	Users should be prompted to combine these specific energy efficiency measures, by the platform, when registering a building or completing an offer.	Under development
S43	According to feedback from one stop shops, the platform could be useful for them to overcome barriers related to financing in the public sector.	One stop shops can benefit from the new use cases targeted to the Public Sector (UC5 – UC8).	Under development
S44	Certain types of Financiers such as alternative lenders would use the platform to find projects that could help them reach their sustainability goals.	The platform enables the prioritisation of projects based on their environmental impact.	Implemented
S45	Many users would like to know who else is using the platform, before joining.	It is not possible to reveal who uses the platform since this is against the user terms and conditions, privacy policy and GDPR. To address this, the ENERGATE partners have given the opportunity to stakeholders to provide letters of support. The logos of those stakeholders are visible in the platform's homepage, in the "Supporters" section.	Implemented
S46	Some users might want to use the platform not only to benefit from the services but also to promote the fact that they are environmentally aware and prioritise sustainability.	The logos of the users who provide letters of support are visible in the platform's homepage, in the "Supporters" section.	Implemented
S47	Rewards for the users would be useful.	The user performance feature provides a gamified rewarding system.	Implemented
S48	Projects of smaller scales should not be neglected.	The aggregation process increases the chances of smaller projects to be financed.	Implemented
S49	Tracking electricity, temperature and humidity savings/ impact would be useful.	These results will be monitored during the Deliver Stage.	Under development.
S50	The users might want to use the platform only for specific services and not for the whole process.	The ENERGATE platform provides flexibility since its services can function independently and the user does not have to follow the whole process.	Implemented
S51	The term "matched buildings" might be confusing for Financiers in the matchmaking process.	The term "matched projects" will be used instead.	Developed

Stakeholder suggestion/ remark		Platform adjustment	Stage of integration
S52	The list of different financing methods that appears when a Building Owner registers a building in the platform might be confusing for Building Owners and maybe they could just specify whether they are looking for finance or not.	The list includes tooltips explaining each financing method.	Implemented
		The user is not mandated to choose a financing method, they can just declare that they are looking to finance the project.	Implemented
		If more stakeholders have a problem with this, the list could be removed from the information entries.	Under discussion
S53	Some Building Owners are not comfortable with the name of the company being displayed before being matched with an Implementor.	The platform might provide the option of hiding the name of the company before the first offer, however in that case the users will be warned that this would reduce their chance of receiving offers from Implementors. Furthermore, the name would become available immediately after the acceptance of the offer and the match.	Under discussion

Table 36: Overview of stakeholder suggestions – correlation with user types

Stakeholder suggestions	Building Owners	Implementors	Financiers	Public Bodies
S1	√	√	√	√
S2	√	√	√	√
S3			√	
S4	√	√	√	√
S5		√		
S6				√
S7		√	√	
S8	√		√	
S9		√	√	
S10		√		
S11	√			√
S12	√	√	√	√
S13		√		
S14				√
S15				√
S16			√	√
S17				√
S18			√	
S19	√			
S20			√	
S21	√	√	√	√
S22	√	√	√	√
S23			√	

S24	√	√	√	√
S25	√	√	√	
S26			√	
S27			√	
S28		√	√	
S29		√		
S30			√	
S31		√		
S32		√		
S33			√	
S34	√	√	√	√
S35	√			
S36	√	√	√	√
S37	√	√	√	√
S38				√
S39				√
S40				√
S41		√		
S42		√		
S43				√
S44			√	
S45	√	√	√	√
S46	√	√	√	√
S47	√	√	√	√
S48	√	√	√	√
S49	√	√	√	√
S50	√	√	√	√
S51			√	
S52	√			
S53	√			

6. User requirements: updates

In this section, the updated user requirements (UUR) of the ENERGATE platform are outlined. These requirements represent the various functionalities that the platform needs to provide in order to enable the services that are expected by the different user types.

6.1. Zero Stage

Table 37: Zero Stage user requirements

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
UUR #01	ENERGATE platform allows user registration.	All	All	-
UUR #02	Users fill in their information (name, surname and position in organisation, contact details).	All	All	-
UUR #03	Company representatives fill information of the organisation (address, VAT number and others).	All	All	-
UUR #04	Implementors fill in information about their area of expertise (technologies provided, market experience, geography covered).	Implementor	UC1, UC2, UC4, UC6, UC7	-
UUR #05	Users provide proof/ verification that they are an authorised representative of the organisation.	All	All	S22

6.2. Fetch Stage

Table 38: Fetch Stage user requirements

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
UUR #06	Building Owners create building profile.	Building Owner	UC1, UC4, UC9	-
UUR #07	Public Bodies create building profile.	Public Body	UC5, UC6, UC7, UC8	S6
UUR #08	Implementors create building profile.	Implementor	UC2	-
UUR #09	Users provide building description.	Building Owner, Implementor, Public Body	All	S6
UUR #10	Users insert in the ENERGATE platform the buildings' geographical information (e.g. Country, Province / Region, Climate Zone).	Building Owner, Implementor, Public Body	All	-
UUR #11	Users insert in the ENERGATE platform building ownership status.	Building Owner, Implementor	UC1, UC2, UC4, UC9	-
UUR #12	Users specify the building type.	Building Owner, Implementor, Public Body	All	-
UUR #13	Users provide building technical information (e.g. year of construction, EPC level, size, usage, occupancy level).	Building Owner, Implementor, Public Body	All	-
UUR #14	Users insert buildings' systems (type of heating, type of cooling).	Building Owner, Implementor, Public Body	All	-
UUR #15	Users insert buildings' previous renovation actions.	Building Owner, Implementor, Public Body	All	-
UUR #16	Users insert buildings' baseline energy consumption (electricity, heating and cooling) (annual).	Building Owner, Implementor, Public Body	All	-
UUR #17	Users declare if they have data on energy consumption from meters and the frequency of the data (e.g. hourly)	Building Owner, Implementor, Public Body	All	S35
UUR #18	Users exploit platform services to understand the impact of different	Building Owner,	All	S11

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
	renovation actions and to learn from previous energy efficiency projects.	Implementor, Public Body		
UUR #19	ENERGATE platform provides project alternatives to Implementors.	Building Owner, Implementor	UC1, UC4, UC6	-
UUR #20	Implementors provide preliminary information on energy efficiency measures to be applied, walkthrough and similar projects implemented in the past.	Implementor	UC1, UC4	S5
UUR #21	Building Owners reject and accept offers.	Building Owner	UC1, UC4	-
UUR #22	Building Owners receive notifications from Implementors.	Building Owner, Implementor	UC1, UC4	-
UUR #23	Building Owners select their preferred type of finance.	Building Owner	UC1, UC9	-

6.3. Process Stage

Table 39: Process Stage user requirements

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
UUR #24	Implementors provide KPIs on environmental impact like energy savings, estimated CO ₂ emissions, M&V protocols and class after renovation.	Implementor	UC1, UC2, UC4	-
UUR #25	Implementors provide the proposed contract type and financial KPIs of the project (e.g. upfront payment, CAPEX, avoidance cost, payback time, IRR, NPV).	Implementor	UC1, UC2, UC4	S28
UUR #26	Implementors can upload files such as business plan, certifications, insurances, protocols etc.	Implementor	UC1, UC2, UC4	S23
UUR #27	The platform verifies KPIs that the Implementor inserts through internal calculations.	Implementor	UC1, UC2, UC4	S2
UUR #28	The platform provides benchmarking for KPIs.	Implementor	All	S2

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
UUR #29	ENERGATE platform provides aggregation filters to aid Implementors to create a cluster of different projects.	Implementor	UC1, UC2	S7, S32, S48
UUR #30	Financiers provide matchmaking filters.	Financier	UC1, UC2, UC7, UC8, UC9	-
UUR #31	Financiers provide prioritisation filters.	Financier	UC1, UC2	S26, S44
UUR #32	Users can receive guidance on EU taxonomy compliance.	Implementor	UC1, UC2, UC4, UC6, UC7, UC8, UC9	S27
UUR #33	ENERGATE platform sends notifications to financiers when their criteria are met.	Financier	UC9	S30
UUR #34	Financiers evaluate the project clusters through the platform's services.	Financier	UC1, UC2	S33
UUR #35	Financiers request documents proving end client's reliability.	Financier	UC1, UC2, UC8, UC9	-
UUR #36	Financiers send a term sheet to Implementors.	Implementor, Financier	UC1, UC2	-
UUR #37	Building Owners send notification of interest to Financiers.	Building Owner, Financier	UC9	S3, S8
UUR #38	Financiers select from a list of requirements the input they need from Building Owners or Implementors.	Building Owner, Implementor, Financier	UC1, UC2, UC9	S3
UUR #39	Implementors can accept or decline the term sheet.	Implementor, Financier	UC1, UC2	-
UUR #40	Financiers can accept or reject the notification of interest they receive from Building Owners.	Building Owner, Financier	UC9	S3, S8
UUR #41	Financiers can inform platform users about banking products/ financing tools.	Financier	UC9	S18
UUR #42	Building Owners are informed about available financing tools and methods.	Building Owner	UC1, UC9	S19

ID	Description	Related User Type	Related Use Cases	Related Stakeholder Suggestion
UUR #43	Users need explanations of the information entries to provide correct input.	All	All	S4
UUR #44	The risk assessment provided by the platform can be used as an optional service aiming to assist users.	Implementor	UC1, UC2, UC4	S9
UUR #45	Implementors may provide technical studies and quality control.	Implementor	UC1, UC2, UC4, UC6	S13
UUR #46	Public Bodies are informed about funding sources.	Public Body	UC5	S15
UUR #47	Public Bodies are assisted by the platform to select the best funding source.	Public Body, Financier	UC5	S15, S16, S17
UUR #48	Public Bodies inform market actors about energy efficiency projects and public procurements.	Public Body, Implementor, Financier	UC6.A, UC7	-
UUR #49	Public Bodies are matched with Implementors to provide technical support in energy efficiency projects with investment cost below tender threshold.	Public Body, Implementor	UC6.B	-
UUR #50	Public Bodies connect with Implementors that can provide technical studies.	Public Body, Implementor	UC6.B	S14

6.4. Deliver Stage

Table 40: Deliver Stage user requirements

ID	Description	Related User Role	Related Use Cases	Related Stakeholder Suggestion
UUR #51	Building Owners provide reports on savings & EPC level.	Building Owner	UC1, UC4, UC9	-
UUR #52	Implementors report on project status, achieved energy savings, CO ₂ emissions abatement, M&V used, projects successfully financed.	Implementor	UC1, UC2, UC4	-
UUR #53	Financiers report on the total invested amount since they became a member.	Financier	UC1, UC2, UC8, UC9	-

ID	Description	Related User Role	Related Use Cases	Related Stakeholder Suggestion
UUR #54	Users are interested in monitoring non-energy benefits caused by the energy efficiency projects.	All	All	S24, S49
UUR #55	Users would like to have a profile analysis and rewards.	All	All	S12, S47
UUR #56	Users would like to have access to energy predictions, statistics and visualised results.	All	All	S21, S34, S49
UUR #57	Users have access to and may update or delete any information that they have provided, including their own account.	All	All	-

7. Conclusions

The present deliverable is the final version from a series of three reports specifying the input information as well as the GUI for the ENERGATE platform's acquisition front-end, for a standardised method of collection of information for user registration, project description, aggregation and matching processes and follow – up on realised projects. The report also specifies the type of users, details the use cases for the use of the platform and the system of user performance.

To extract the platform's workflow, the user types and user roles, the input information and any additional methodologies and services, a methodological framework is followed consisting of concrete steps. The methodology relies on the creation of a prototype GUI that is used in order to collect feedback from consultation (both within the consortium and with external stakeholders). The GUI is finetuned according to the results of the consultation and it guides the platform's development. The most important element of the methodology is the feedback loop ensuring continuous enhancement of the platform according to the identified needs of market actors. Some suggestions will be taken into account for the exploitation phase, meaning that they might be integrated after the project's end depending on the sustainability strategy that will be followed.

At this stage of the project, the ENERGATE platform has been released for seven months, is already used by market actors and has received positive feedback. The current version of the platform is based on the 57 user requirements and 53 stakeholder suggestions. The partners of the project have identified 65 actions to address the suggestions and remarks. More than 90% of those are either already fully implemented and integrated in the platform, or current under development or integration.

The final version of the platform's workflow is based on the four user profiles: Building Owner, Implementor, Financier and Public Body, whose interactions in the platform can be defined through 9 use cases. The information entries of those use cases have been defined, for all four stages of the workflow (Zero – Fetch – Process – Deliver). Minor modifications might still be implemented, in line with new stakeholder suggestions, as long as they do not affect the platform's established structure and processes. These modifications will be reported in the following WP3 deliverables.

Annex

The following questionnaire was used to extract the input needed

During the 4th ENERGATE project meeting in Turin, an interactive session was organised in the framework of the WP2 presentation.

The most important objective of WP2 is the definition of user types, use cases, and information entries for the ENERGATE platform. Partners involved in WP2 have worked closely with partners involved in WP5, so as to adapt the use cases, taking into account the feedback received from stakeholders and the needs of the market. The majority of the ENERGATE consortium have utilised their network of stakeholders to present and promote the platform and have collected interesting comments and suggestions that have the potential to improve and enrich the services offered by the platform. To this end, it is useful to discuss the feedback and consider the different perspectives.

Since the project meeting took place on M23 (November 2024) and the WP2 timeline is completed on M28 (April 2025), the interactive session was organised with the aim of collecting input from partners based on their expertise, to finalise the use cases that have been proposed by the different stakeholders.

Specifically the interactive session was enabled by a survey consisting of three questionnaires:

- [Group A: general workflow](#)
- [Group B: Public Bodies](#)
- [Group C: Banks & private buildings](#)

The partners were divided into three groups, to answer the different questionnaires.

The summary of the results is presented in the following sections.

Group A – general workflow

According to the responses, the following key results are extracted:

Registration – verification process

To verify that the users registering on the ENERGATE platform are indeed authorised to represent the specific company, the respondents suggested that we use business registries, a letter of authorisation, and ID card if applicable.

There are also specific verification tools that could be used according to the country (e.g. PEC (Italy)), however, it should be highlighted that this might complicate the verification process, especially when additional countries will be added in the platform at the stage of replication.

The results are also summarised in:

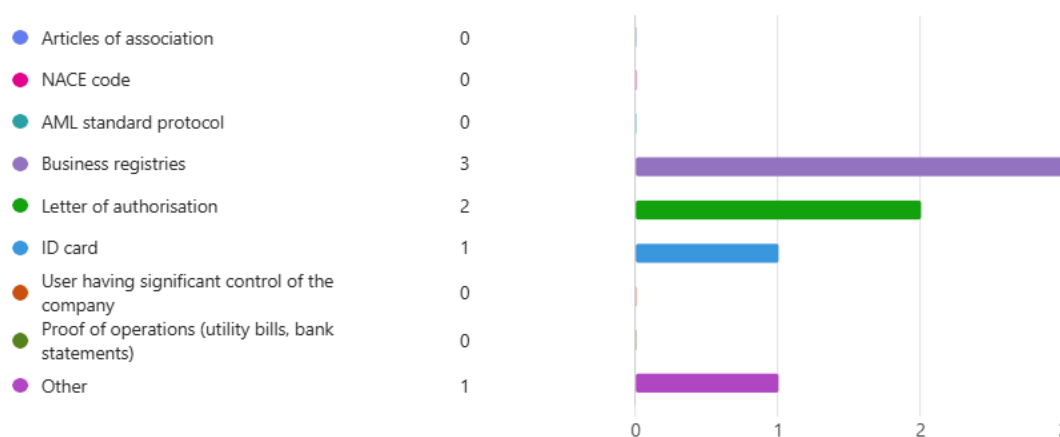


Figure 23: Responses to “What can we use in the registration process for verification of the company and validation/ confirmation of the user's authorisation?”

User types – segmentation of the “Implementor” profile

Currently, the “Implementor” profile includes various subcategories of Implementors, that have different roles in the energy efficiency value chain. A few stakeholders have pointed out that not all companies can both conduct studies and implement energy efficiency projects. Therefore, it is debatable whether or not the energy consultants that conduct technical and feasibility studies, but do not proceed with the actual implementation of the identified measures, could be part of the ENERGATE platform.

The partners were skeptical about this user role. According to the responses, energy consultants that do not implement energy efficiency measures (or do not have a specific partner that they cooperate with in order to implement them) could perhaps be users of the platform, by publicising their profile and indicating specific area of technical studies they are experts in, and to be matched with ESCOs.

In any case, this could be an additional functionality and is not necessarily a priority for the ENERGATE platform, since the focus of the platform is to bridge the communication gap with the financing side.

Deliver Stage – Data Entries

The respondents were also requested to provide suggestions with regards to the information that will be included in the “Deliver Stage” of the platform, which will enable the effective monitoring and evaluation of project results.

As a first step, the respondents were asked to specify which energy – related information could be used in the “Deliver Stage”. Besides the total energy and CO₂ savings, the new EPC level should be reported, whereas additional indicators such as the energy efficiency ratio, the energy performance index and the renewable energy share could also be included. Moreover, one of the respondents suggested that EU Taxonomy could also be considered, solely based on CCM and no other criteria.

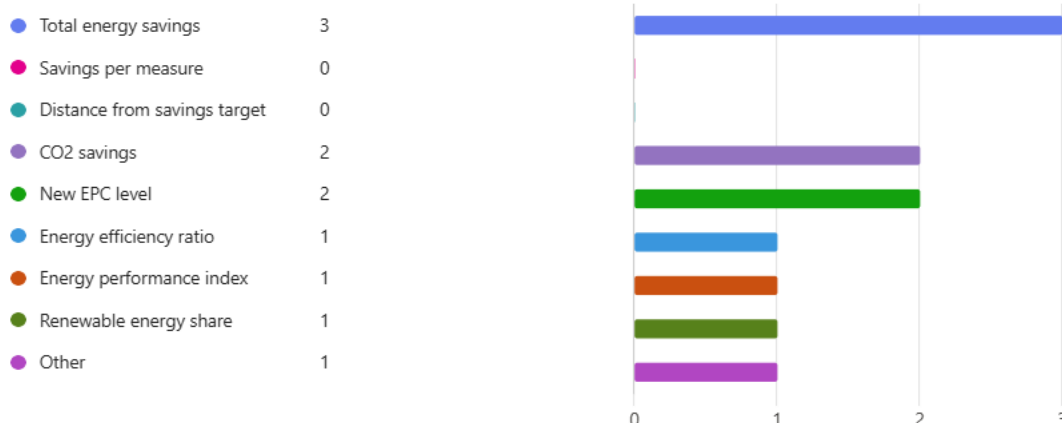


Figure 24: Responses to “What data should we use in the “Deliver Stage” to evaluate the energy efficiency/ environmental impact of the project?”

When it comes to the financial performance of the project, it appears that all suggested indicators could be considered, while IRR and payback time are the most important.

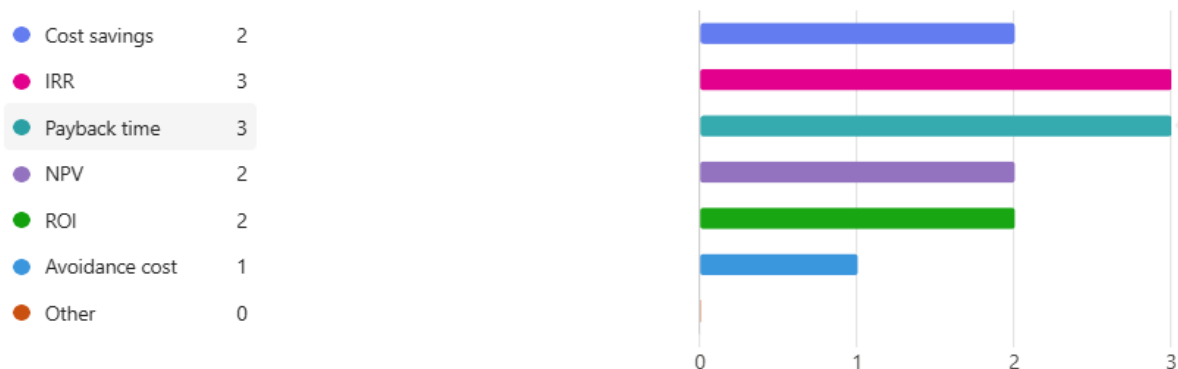


Figure 25: Responses to “What data should we use in the “Deliver Stage” to monitor the financial performance of the project?”

Finally, additional information that could be reported in the Deliver Stage include the project status, timeline, budget adherence, as well as non – energy benefits.

Group B – Public Body

According to the responses, the following key results are extracted:

Funding mechanisms

The respondents suggested several key information that could be used as filters/ criteria to propose the most suitable funding mechanisms to Public Bodies. The most important information include the investment size, the energy efficiency measures to be applied, the percentage of the investment that is covered by the fund, and the requirements for the application process. The respondents also suggested that monitoring of results of the project could also be included, if applicable. Therefore, the “Deliver Stage” could be available to public buildings as well.

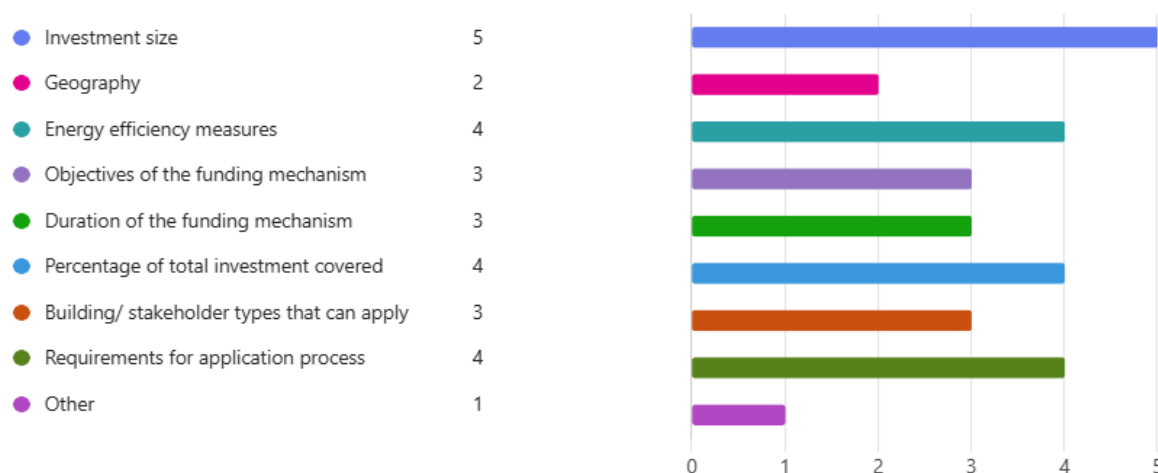


Figure 26: Responses to “Which of the following could be used to define, filter and evaluate different EU funding mechanisms in the platform?”

Furthermore, according to most of the respondents, national funding mechanisms should also be included in the platform, applying the same filters as above. These mechanisms could be provided as links to national public calls and tenders, which are already regularly updated. However, it has also been highlighted that this might possibly be redundant as most mechanisms have pre-defined guidelines and appointed entities that support their implementation. Furthermore, national funding mechanisms have their own distribution and information channels, that are linked with specific government programmes planned and implemented based on the State Budget planning process and administered by line ministries and their agencies. Thus, any external agency would not be up to date with this process to be competent to keep the platform information up to date. Furthermore, according to the responses, lists of funding mechanisms could also be provided for private buildings.

An issue when it comes to funding mechanisms – both for public and private buildings – is the frequency of updates of the information. According to some respondents, an update every 3 to 4 months would be enough, however others suggest more frequent updates, on a monthly basis. It is recognised that frequent updating requires a permanent structure in each partner country/region with staff, platform users/followers enrolment budget, IT support, etc. This function requires budget, just like running any other IT platform. Moreover, this agent should be in the centre of a dialogue where funding for energy efficiency measures is being planned, allocated, monitored and reported. This is an important note, especially when replication in multiple countries is considered.

Matches with Financiers in the platform

The respondents were asked whether or not public fund managers (and other relevant organisations) could use the platform, as an extra communication channel for available funding mechanisms. Half of the respondents agreed that this could be done. According to the responses, potential users that could benefit from this use case include Green Funds in each EU Member State and line ministries or government agencies. However, this would be a national decision on the level of the Ministry of Finance (for Latvia) that line ministries: the Ministry of Economy, the Climate and Energy Ministry or any other Government agency is obliged to use the platform. It is a process of political decisions, such platform should be a part of entire EU funds management scheme that is regulated by national legislation. Moreover, distribution and approval of public funds/EU funds should follow equal access to information and projects selection and funding process based on criteria defined by each programme. In Latvia, the Development Finance Institution ALTUM, Central Finance and Contracting Agency (CFLA), Ministry of Environmental Protection and Regional Development (VARAM), are some examples of potential users.

The other half of the respondents disagreed with this use case, since according to them the public fund manager do not allocate the funds directly to some public/private entities, but only through public calls and tenders. They also suggest that direct access is preferable to secure proper up-to-date information. Finally, although the platform could be an extra channel, there are already some specific established channels that stakeholders use to be informed.

The respondents were also asked to specify whether or not a project that has already identifies an Implementor to execute it and is fully defined could be added in the platform so as to be matched with a Financier. According to the respondents, in Latvia if the project is assigned to Implementors (service providers), it means that the public body already has financing source and procurement process is completed and specific service provider is already selected through the centralised procurement platform eis.gov.lv. In Greece, this is also not a usual use case. However, this could be promising if the (public) funding rate is not 100%, because public bodies often struggle to cover the remaining costs of the project, so it is good to search for additional funding sources on the platform.

Aggregation

When it comes to aggregation for public buildings, according to the responses it is a use case that should be examined, especially at regional level (different programmes are launched at regional level), as well as in the case of small Municipalities that often struggle to absorb funding for a small/medium sized project. Combining with neighbouring Municipalities could be an option, but it's a bit difficult considering administrative boundaries and collaboration between different Municipalities. In addition, neighborhood public authorities are very often "competitive" and they do not want to collaborate together.

In the case of Latvia, currently, Riga City is discussing implementation of EE projects aggregation - idea to perform EE measures in blocks (quarters) of buildings. But at the moment it is a new concept, not approved yet. Typically, a separate municipality would perform EE renovations building by building based on its financial capacity, and would not opt for building aggregation model. It would not join building projects with other municipality as well. In public buildings it is building/by building competition in attracting finance.

Direct award

According to the respondents, directly connecting Public Bodies and Implementors in case the investment size does not exceed the tender threshold could be a relevant use case, for Municipalities with small network. Although Public Bodies would be probably interested in a

database of implementators, it is difficult to state if/and under what circumstance a public body would go to direct award. Anyway it would be price quotation - explicit direct award would not be possible.

Group C – Banks and private buildings

According to the responses, the following key results are extracted:

Banking products

To define a banking product in the platform, the Financier should add the product name, the building type and ownership, the energy efficiency measures that could apply, the investment cost, the tenure, and perhaps the interest rate and payback time. It was highlighted that the payback time is not the tenure of the loan, which is more important for the end client. The respondents agreed that the Building Owners in the platform could provide filters to explore available banking products.

Most respondents agreed that a Financier could receive notifications from the platform when a user declares interest in a banking product that they have added.



Figure 27: Responses to “When should the bank/financier receive notifications about projects in the platform?”

National funds/ subsidies

The respondents agreed that the platform could inform Building Owners about national funds that might be of interest to them, however it should be highlighted that this depends on the platform’s capacity to remain updated, especially after the completion of the ENERGATE project.

The respondents were also asked to evaluate the applicability of a proposed use case, in the framework of which banks in the platform could assist Implementors that have aggregated projects under the same subsidy, so that they can have financial support in the initial stages of the project, to avoid delays (i.e. provide bridge loans). Most of the respondents (75%) disagreed with this use case.

Based on the results of the session, it becomes clear that:

Group A – General Workflow

- Business registries, letters of authorization, and ID cards could be used for user verification, with country-specific tools like PEC in Italy.
- Including energy consultants who only conduct studies without implementing measures in the platform is debatable; such users could perhaps partner with ESCOs.
- “Deliver stage” data could include total energy and CO2 savings, EPC levels, energy efficiency indicators, renewable energy share, and financial metrics like IRR and

payback time. Non-energy benefits and project-specific details (status, timeline, budget adherence) could also be included.

Group B – Public Bodies

- Key filters to support decision making with regards to funding mechanisms include investment size, energy efficiency measures, and application requirements.
- National funding mechanisms could be integrated but present challenges due to update requirements.
- The views on whether public fund managers should use the platform are mixed. Some saw value in it as an extra communication channel; others noted that existing systems already serve this purpose.
- Regional-level project aggregation was proposed, especially for small municipalities. Challenges include administrative boundaries and competitiveness.
- Direct awards could be possible for small investments below tender thresholds.

Group C – Banks and private buildings

- Financiers could define banking products by providing details such as building type, energy efficiency measures, investment cost, and payback time.
- Notification could be sent to Financiers when a user is interested in the banking product.
- Most respondents opposed banks providing bridge loans to implementors aggregating projects under subsidies.

OUR TEAM

Project Coordinator



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