

# Quality Criteria for Facilitator Pools

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Prinses Beatrixlaan 2

2595 AL The Hague, The Netherlands

**Telephone:** +31 6 27239641

**E-Mail:** [selina.roskam@rvo.nl](mailto:selina.roskam@rvo.nl)

**Internet:** [www.guarantee-project.eu](http://www.guarantee-project.eu)

**Author(s):** Selina Roskam, Georg Böning

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## Introduction

To ease the access to and identification of well-qualified EPC facilitators for building owners in Europe, national pools of EPC facilitators are being established in all participating Member States.

A detailed list of quality criteria for the selection of the EPC facilitators was defined in this document including consultant's professional background and relevant references. Furthermore, good knowledge is required on available ESM, baseline calculation, financial solutions as well as expertise concerning contracts and procurement.

The facilitator pools are made public, including contact details, references and specific skills. In countries, where EPC facilitator pools already exist (e.g. Germany), a collaboration with these and link to the respective directories was established.

## EPC facilitators criteria

### Preparation phase:

#### Technical skills

- Knowledge of energy & indoor climate KPIs
- Knowledge of HVAC systems
- Knowledge of M&V

#### Financial skills

- Financial conditions
- Dividing risks and risk management

#### Legal skills

- Legal conditions
- National law
- Procurement
- Contracting conditions

#### Project skills

- Process manager internal and external (project management, politics, decision making process in governments, change management, collaboration, communication)

#### Social skills

- Excellent communicator
- Independent and reliable

### Tendering phase:

#### Technical skills

- Financing models
- Legal and juridical aspects of procurement
- Procurement, selection, contracting
- M&V Measurement and Verification
- Arrangements for disputes (Bonus/malus)

Name:

Place and date:

Signature:



## Self Declaration for EPC Facilitators\*

Hereby I declare to meet the EPC Facilitators criteria, drawn up by the EU GuarantEE partners.

To be specific, I will meet the following requirements:

- I support and will adhere to the GuarantEE EPC facilitators criteria (**signed PDF**)
- I support and will adhere to the values and principles of the European EPC Code of Conduct (**signed PDF**)  
<http://www.transparence.eu/eu/epc-code-of-conduct>
- I will read the EESI2020 EPC Facilitators Guideline and operate according to these principles  
[http://eesi2020.eu/wp-content/uploads/2014/11/EESI2020\\_EPC\\_Facilitators\\_Guideline.pdf](http://eesi2020.eu/wp-content/uploads/2014/11/EESI2020_EPC_Facilitators_Guideline.pdf)
- I agree with the publication of my EPC related track record, including:
  - Contact information
  - Professional education and expertise
  - Relevant EPC Facilitator trainings completed
  - Realised EPC projects, with references and links
- I reaffirm to constantly work on my development and training of EPC Facilitator skills, e.g. following guarantEE trainings or webinars.

\* Disclaimer: Only the signatories themselves are responsible for the correctness of the data provided. There will be no formal accreditation or control.

Name:

Place and date:

Signature:

## EPC facilitators Track Record Template

### Contact information

- photo
- name
- (address)
- email address
- linkedIn profile
- telephone nr

### Professional education and expertise

- xxx
- xxx
- xxx
- xxx

### Relevant EPC Facilitator trainings completed

- xxx
- xxx
- xxx
- xxx

### Realised EPC projects, with references and links

- xxx
- xxx
- xxx
- xxx

Name:

Place and date:

Signature:

## Background information

### **Energy Performance Contracting**

Energy services such as Energy Performance Contracting (EPC) help building owners in the modernisation of their facilities, and to make their buildings more energy efficient. The planning, financing, implementation and maintenance of a set of technical measures are outsourced to an experienced energy service company (ESCO). The ESCO finances all investments through future energy savings, guarantees energy and cost savings to the client and bears the financial, technical and performance risks.

### **GuarantEE**

GuarantEE fosters the use of Energy Performance Contracting in the public and private sector across Europe by especially developing innovative EPC solutions for rented facilities, making EPC more flexible to better serve private sector clients and supporting EPC pilot projects with experienced facilitators.

The 14 consortium partners of the guarantEE project are covering large parts of Europe in a mix of advanced and emerging ESCO markets.

The GuarantEE project is being funded by the European Union's Horizon 2020 research and innovation programme. (<http://guarantee-project.eu>)

### **EPC facilitators: role and added value**

Experienced EPC facilitators can support the demand side in the preparation phase, in calculation of business cases and scenarios, and also in the tendering and implementation phases, with technical, financial, legal knowledge. They can also support the project organisation and communication.

The strategic question is: make or buy? EPC facilitators help their clients in the consideration on how to implement best? In-house implementation or outsourcing with Energy Contracting?

### **Independency**

For the demand side independency of the EPC facilitators is very important. There may be no conflicting interests. The rules are clear: EPC facilitators are not allowed to take part in the tender or be affiliated with potential bidders. This can be captured in the facilitator's contract.

But: the client may explicitly ask the EPC facilitator to give feedback to both the contracting authority and the provider(s). This will improve the tender specifications, facilitate transparent cooperation, and lead to the most sustainable solutions, technically as well as economically.

### **'Accreditation' / Self declaration**

There is no formal accreditation or qualification procedure to be included in the list of EPC facilitators. Instead, facilitators have to provide a self-declaration on their qualifications and references.

Listed EPC facilitators agree to

- Support and adhere to the GuarantEE EPC Facilitators criteria
- Support and adhere to the principles of the European Code of Conduct for EPC (<http://www.transparens.eu/eu/epc-code-of-conduct>)
- Make use of the EESI2020 Facilitators Guide for EPC (eesi2020.eu)
- Publish their professional qualification and references
- Participate in EPC facilitators trainings (or webinars)

### **Registration**

For the demand side it is very important that the expertise, quality and independency of facilitators are guaranteed. Therefore every EU partner will facilitate a website for facilitators to be listed and provide a concise self-description on their personal qualification as EPC facilitator.

EPC facilitators will be registered on independent national websites, and also on the GuarantEE website. This will be an open pool.

Registration will be on personal title (1 contact person, at senior level, is responsible; also for enabling all relevant expertise/colleagues). No registration institutions, only for individual persons.

### **Disclaimer**

Only the facilitators themselves are responsible for the correctness of the data provided. There will be no formal accreditation.

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