New Energy Solutions Optimised for Islands

NESOI

EUROPEAN ISLANDS FACILITY

D3.3: Grid of Selection Criteria for the Evaluation of Projects

WP3, T3.3

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Technical References

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* PU = Public

PP = Restricted to other programme participants (including the Commission Services)

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)

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DISCLAIMER

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List of Acronyms

DSO	Distribution System Operator
EC	European Commission
EU	European Union
GHG	GreenHouse Gas
H2020	Horizon 2020
RES	Renewable Energy Sources
SEAP	Sustainable Energy Action Plan
SECAP	Sustainable Energy and Climate Action Plan

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1 Introduction

The EU Island Facility NESOI (New Energy Solutions Optimised for Islands) is a four-year Horizon 2020 project funded under call topic LC-SC3-ES8-2019 (European Islands Facility – Unlock financing for energy transitions and supporting islands to develop investment concepts). It began on October 1st, 2019 and will finish on September 30th, 2023 and is made up of a multi-disciplinary consortium consisting of 10 partners from seven EU member states. It has a total budget of €10 million of which approximately €3 million is dedicated to a cascade funding mechanism to provide direct financial support to EU Islands

Coupled to consortium capacity building activities, the facility aims to mobilise more than €100 million of investment in sustainable energy projects to an audience of 2,400 inhabited EU islands by 2023, giving the opportunity to test innovative energy technologies and approaches in a cost-competitive way and leading to an expected 440 GWh/year in energy savings.

Work Package 3 of the NESOI project has the main aim of setting up the entire process of the call for applicants that will be managed through the NESOI Facilitating Platform. In this context, Task 3.3 of NESOI project aims at analysing, developing and refining criteria to evaluate the project proposals applying to NESOI platform for technical and financial assistance. The selection criteria are developed to be transparent and publicly available in order to guarantee a fair competition and maximize projects' quality.

To this purpose four selection criteria dimension have been identified and specific relevant KPIs are identified to evaluate the projects from different perspectives (technological, economic, financial, social, environmental, circularity, etc.), based on the experience of relevant NESOI partners in their field of expertise, on state-of-the-art analysis and on common EU references.

While the defined criteria are in principle the same for the two rounds of calls for applicants, their weight in the final evaluation and ranking of the proposals could be different: this will be clearly defined in T3.4 on "Organisation of call for applicants" (e.g. thresholds, weights, applicability, etc.).

1.1 Executive Summary

The aim of NESOI D3.3 – "Grid of Selection Criteria for the Evaluation of Projects" is to describe the structure of proposals to be submitted to request NESOI support and the evaluation criteria to select projects to be supported.

The intention of NESOI Consortium in the elaboration of this Deliverable was to keep as easy as possible the preparation of the proposals by the applicants and the consequent evaluation phase, to be carried out through objective and transparent criteria and ensuring quality of the selected projects and compliance with objectives of EU targets for islands' decarbonization.

The selection process presented in the document has been identified through a discussion among NESOI Consortium members and dialogue with the European Commission and is articulated in the following steps:

- Distribution of responsibilities;
- Assessment by single evaluator;

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- Discussion among evaluators;
- Ranking;
- Final selection.

Specifically, the evaluation of the received proposals is based on a scoring from 1 to 5 similar to the one adopted in the Horizon 2020 programme, plus a system of bonuses provided on key areas addressed by the proposal (replicability, innovation, archipelago). The evaluation is provided by each evaluator on the following four macro-areas:

- project description and main features;
- project impacts;
- project execution and NESOI support;
- beneficiary and island ecosystem.

In addition to the structure of the proposals and the evaluation criteria for the NESOI Platform for Technical and Financial Assistance, the last section of the Deliverable presents also the same information regarding the NESOI Erasmus Programme, whose aim is to stimulate staff exchange between islands' staff members.

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2 Project Evaluation Methodology

Proposals submitted through the NESOI Facilitating Platform within the Call duration limits will be subject to the evaluation process.

The proposal evaluation process foresees the following five steps:

- distribution of responsibilities;
- assessment by single evaluator;
- discussion among evaluators;
- ranking;
- final selection.

Further details on the above-mentioned five steps are presented in the next paragraphs.

2.1 Distribution of Responsibilities

The Coordinator will collect the received proposals, assign a unique project proposal number to each and carry out together with a team of technical and economic-financial partners (among the following eight: SINLOC, RINA-C, R2M, ZABALA, CIRCE, CERTH, E.ON, WOLF) a first screening of the proposals and eligibility check aimed at identifying potential macroscopic inconsistencies and errors before sending proposals to the evaluation phase.

Then, the Coordinator will assign each proposal to three reviewing partners out of the above mentioned eight.

The identification of the reviewing partners will be based on matching the macro-area as defined by the project promoter in Section 1 of the proposal with the competencies, operational capacity and technical background of the partner.

Moreover, other factors will be taken into account in the distribution of responsibilities, including: absence of conflict of interest, language (in case that supporting documents are provided in a different language than English) and partners' workload (number of proposals to be assigned for evaluation).

The identified partners will be notified of the assignment and will need to accept it by confirming the absence of conflict of interest. In case of conflict of interest, the evaluation of the proposal will be assigned to another partner.

2.2 Assessment by Single Evaluator

At the beginning of this step, the proposal will be sent to the three selected evaluators.

It is specified that the term evaluator refers to the project partner company (i.e.: SINLOC, RINA-C, R2M, ZABALA, CIRCE, CERTH, E.ON, WOLF) to which the evaluation is assigned.

The partner company will then assign the task of evaluating the proposal to one of its employees, having at least five years of experience in the energy transition sector with specific focus on the macro-area of the project to be evaluated.

Each evaluator will receive the whole proposal package and carry out the assessment within two working weeks.

Each evaluator will first assess the structure and contents of the proposal and highlight any relevant error or gap against required content.

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Then, he/she will score the proposal with a mark from 1 to 5 (with 0.5 resolution) on each of the following four areas of evaluation:

- project description and main features;
- project impacts;
- project execution and NESOI support;
- beneficiary and island ecosystem.

Following the approach adopted in the evaluation of Horizon 2020 project proposals, the marks are to be given according to the following equivalences:

- 1 – Poor - the criterion is inadequately addressed, or there are serious inherent weaknesses.
- 2 – Fair - the proposal broadly addresses the criterion, but there are significant weaknesses.
- 3 – Good - the proposal addresses the criterion well, but a number of shortcomings are present.
- 4 - Very good - the proposal addresses the criterion very well, but a small number of shortcomings are present.
- 5 – Excellent - the proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

In addition to the scores, each evaluator could assign each proposal one of more "bonuses", whose presence will be considered in the elaboration of the final ranking. These bonuses are related to the following topics:

- replicability, to be assigned if the proposal shows a significant potential for replication in other islands or in the mainland;
- innovation, to be assigned if the proposed technical solution goes significantly beyond the state of the art of the local context;
- archipelago, to be assigned if the proposed intervention is related not to a single island but to more islands of the same archipelago.

The sub-categories covered in each area of evaluation are described into more detail in Section 3; some of the areas of evaluation (highlighted in **bold underlined** in Section 3) need to be evaluated at least as "good" in order not to disqualify the proposal; however, it is recommended to evaluators to provide an overall mark for each area of evaluation and not to assign a punctual evaluation for each sub-category.

In order not to disqualify the proposal, for each evaluator the minimum scoring thresholds are:

- 2.0 (included) for individual areas of evaluation ("project description and main features", project impacts, "project execution and NESOI support", "beneficiary and island ecosystem");
- 12.0 (included) for the total score calculated as the sum of the scores given for the four areas of evaluation.

Attachments (if any) will not be subject to direct evaluation but will be analysed by the evaluator as supporting documents to the core part of the proposal.

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Each evaluator will insert the outcomes of his/her evaluation (mark from 1 to 5 with 0.5 resolution) for each of the four areas of evaluation and total mark out of 20 (resulting from the sum of the four marks) into a Microsoft Access® database. The marks given by other evaluators will not be visible until the evaluation is completed by all evaluators.

After the evaluation is completed by all evaluators, discussion among evaluators will take place (as per paragraph 2.3); proposals will be ranked (according to paragraph 2.4) and the final selection of projects will be completed (in line with paragraph 2.5).

2.3 Discussion among Evaluators

The Microsoft Access® database created for proposals evaluation purposes will compare marks given by different reviewers and, in case marks given by different reviewers in more than one area of evaluation will differ by more than 1.0, the database will highlight the proposal as needing discussion.

For each proposal requiring discussion among evaluators, a conference call having a maximum duration of 30 minutes will be organized through a suitable platform and will involve all the three evaluators.

Each evaluator will explain the reasons for the given mark and discussion will take place with the aim of agreeing on the most suitable mark.

Minutes of the meeting will be taken and correction of the given marks will, when needed, be done directly in the Microsoft Access® database during or right after the discussion session. The updated marks will provided to the ranking elaboration.

2.4 Ranking

After the completion of the evaluation of the received proposals, the average marks for the creation of the ranking will be calculated.

For each proposal and each area of evaluation, an average mark will be calculated as the arithmetic average of the marks given by the three evaluators.

Average marks will be calculated with two decimals and rounding will be applied according to the following rules:

- values with decimals up to 0.24 will be rounded to the lower integer number;
- values with decimals from 0.25 to 0.74 will be rounded to the lower integer number plus 0.5;
- values with decimals between 0.75 and 0.99 will be rounded to the higher integer number.

The total mark will be calculated as the sum of the average marks obtained in the four areas of evaluation and therefore will have a maximum value of 20.

The ranking will be formed by ordering all the received proposals by descending total score. As mentioned above, proposals with a score lower than 12.0 will be disqualified and will not receive NESOI support.

For projects having the same total score, precedence in the ranking will be given according to (by decreasing order of importance):

- highest financial leverage;
- primary energy savings / avoided GHG emissions (absolute value);
- presence of bonuses (replicability, innovation, archipelago).

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In the unlikely event that all the projects are ranked equally according to these criteria, the first project to be presented to the NESOI Facilitating Platform will be given precedence.

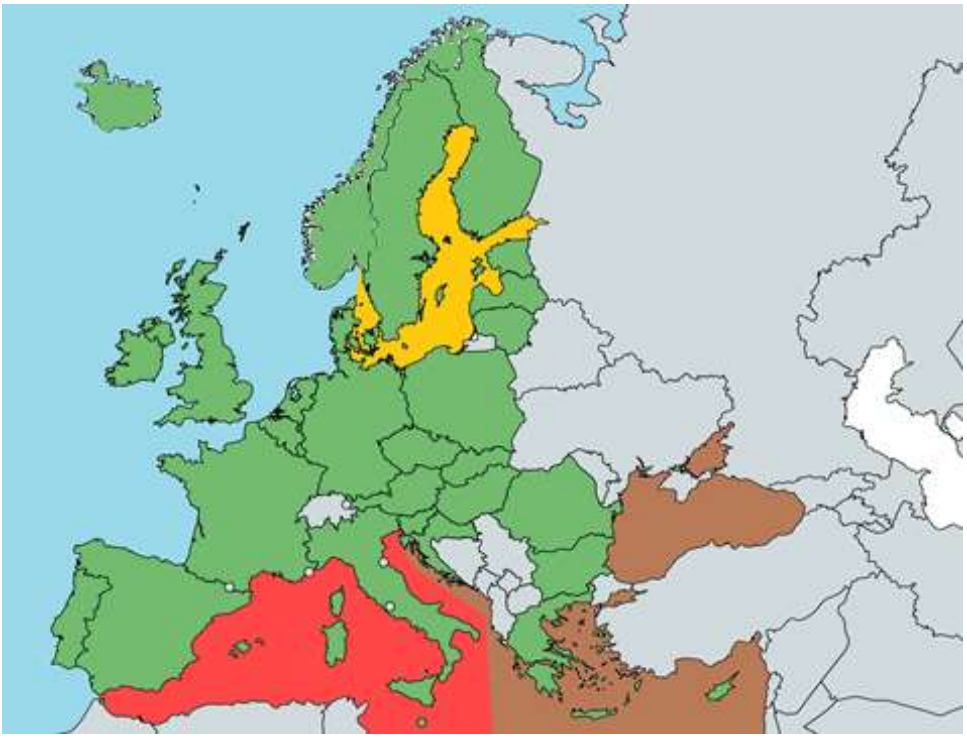
If this latter criterion was not enough to rank the projects, and only one of the projects can be selected for the assistance, a draw before a public notary will be held. If on the other hand both projects would be selected (or not selected), no precedence will be given and the two projects will be ex-aequo.

2.5 Final Selection

Based on the ranking of project proposals developed as described in the previous paragraph, the final selection of projects will be carried out.

The selection will be based on two kinds of macro-areas, according to geographical location and maturity of the project.

As concerns geographical distribution, based on the EU Marine Strategy Framework Directive [1] that identifies four main areas (Baltic Sea, North-East Atlantic Ocean, Mediterranean Sea, Black Sea), the following macro-areas are foreseen for NESOI: Baltic Sea, North-East Atlantic Ocean, Western Mediterranean (Spain, France, Italy, Malta), Eastern Mediterranean and Black Sea (jointly, corresponding to Slovenia, Croatia, Greece, Bulgaria, Romania, Cyprus) and Other areas (e.g. non-European parts of Atlantic Ocean and Outermost Regions). A map of the areas is shown in Figure 1.



[1] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32008L0056

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Figure 1: Map of Geographical Macro-Areas (Baltic Sea – yellow; North-East Atlantic Ocean[2] - light blue; Western Mediterranean Sea - red; Eastern Mediterranean Sea and Black Sea – brown; Other areas – not indicated in the map)

As concerns project maturity, the following macro-areas are identified: entry-level project, conceptual design-level, deployment level. The project proponent will have to indicate, as part of the submission, to which maturity area the project belongs to, but NESOI is allowed to reallocate to a different and more suitable maturity area if needed.

For each macro-area (geographical and maturity-related), each round of calls will specify the indicative number of projects to be selected and the indicative budget to be allocated. Moreover, the second call will consider the results of the first call in the identification of the indicative number of projects and budget per macro-area. These numbers will only constitute indicative values that the NESOI selection process will try to pursue and will be considered with a certain flexibility: in case of lack of projects (or lack of projects with a sufficient evaluation) in a specific macro-area, budget will be shifted to other macro-areas where projects are available.

For each macro-area, the first "n" projects in the ranking will be selected until the first of the following conditions is met:

- the total score threshold of 12.0 is reached;
- the cumulated support to selected projects in the macro-area reaches the maximum amount of financial support to be provided in the call;
- the number of selected projects in the macro-area reaches the maximum number of projects to be supported in the call (if present).

[2] Also including islands from Norway and Iceland, as lands from EFTA Countries have been considered eligible after M18 NESOI Review Meeting. Unfortunately they couldn't participate to the first round of open calls.

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3 Selection Criteria for NESOI Platform for Technical and Financial Assistance

The following paragraphs focus on the contents that proposals shall include to allow evaluation and selection.

The structure of the proposal is firstly presented, then the focus is shifted to the information to be provided in the different sections, with recommendations to evaluators for the assessment of the proposals.

3.1 Proposal Structure

Proposals must be formed of the following parts:

- proposal at a glance (details in paragraph 3.2).
- core sections of the proposal:
  - project description and main features (details in paragraph 3.3).
  - project impacts (details in paragraph 3.4).
  - project execution and NESOI support (details in paragraph 3.5).
  - beneficiary and island ecosystem (details in paragraph 3.6).
- attachments (details in paragraph 3.7).

Proposals shall be submitted through the online form available on the NESOI Facilitating Platform, which will foresee a number of mandatory and optional fields to be filled in, the maximum length for each field and the mandatory/optional additional documents needed, as described in the following paragraphs.

In line with the eligibility criteria outlined in NESOI D3.1, only proposals written in English can be accepted, since all partners of the NESOI Consortium shall be able to understand their content. This is not applicable to attachments, which are accepted also if written in other EU official languages[3].

3.2 Proposal at a Glance

The first section of the proposal must be “Proposal at a glance”, including an abstract of maximum 2,000 characters including spaces, providing information on the following:

- project description covering the main objectives and (expected) impacts, actions foreseen, roles and responsibilities of the involved actors;
- location, including coordinates;
- macro-area of the project (geographical and maturity-related);
- type of project;
- boundaries of the project (i.e: number of buildings included, installed power, etc.);
- expected size of the initiative (Euro);
- KPIs.

[3] https://europa.eu/european-union/about-eu/eu-languages_en

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The type of project shall be one of the following options, determined in line with the outcomes of the NESOI Survey (refer to NESOI D7.2):

- production of energy from renewable sources.
- energy efficiency interventions on assets (buildings, lighting systems, etc.).
- realization/improvement of energy storage systems.
- improvement of the existing electricity grid.
- realization/improvement of district heating and cooling networks.
- energy-related waste and water management actions.
- implementation of sustainable mobility solutions.
- improvement of energy monitoring and management.
- energy auditing and analysis, energy planning;
- other (please specify).

The Key Performance Indicators to be declared in this section (although reported also in the following sections and possibly in the attachments) are:

- primary energy savings (absolute / relative value) and avoided GHG emissions (absolute / relative value); for energy planning/auditing activities – for which typically these values are not available in the initial phases, estimated values can be provided (e.g.: 10-20% of the current energy consumption and GHG emission of the island/site under analysis);
- financial leverage (calculated as ratio between the investment and the amount of requested NESOI support; for energy planning/auditing activities an estimated value of leverage can be provided based on the ratio between the investment amount that is expected to be identified in the activity and the amount of requested NESOI support);
- social acceptance and stakeholders engagement (e.g.: number of authorities/stakeholders engaged, meetings with citizens, use of local manpower, etc.);
- level of innovation (description of whether and to what extent the project goes beyond the state of the art, both in general and with specific reference to the island context).

As outlined in the bullets above, the primary energy savings and the avoided GHG emissions shall be declared both in absolute terms (i.e. in MWh/y and in tCO_2e/y) and in relative terms (as a percentage of the previous value). The latter indicator is left free to the applicant, since it shall be referred to one of the energy systems impacted by the project, e.g. the whole island, a municipality, a building, etc.

3.3 Project Description and Main Features

This section of the proposal shall focus on the description of:

- project promoter(s);
- **location of the proposed action**, including coordinates, population, area and number of municipalities of the island;
- **maturity of the project** (e.g.: entry-level project, conceptual design-level, deployment level, as per definition given in NESOI D3.1);

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- degree of innovation;
- investment size (detailed by single initiative if more actions are included in the proposed project);
- **financial leverage factor** (quantitative, calculated as the ratio between investment mobilized and requested NESOI contribution);
- sources of finance, i.e. the description of the funds that will be used to implement the proposed project;
- expected economic savings and pay-back time of the investment.

When analyzing this section, evaluators will specifically assess the level of **alignment with EU objectives for Islands Decarbonization and NESOI targets** and the **coherence of the presented information**.

It is reminded that topics highlighted in bold underlined are those that must be evaluated as positive to allow the proposal reaching the minimum threshold for eligibility.

3.4 Project Impacts

This section of the proposal shall focus on the description and details of the calculation of:

- **primary energy savings** (quantitative, determined according to calculation methods acceptable for compliance with art. 7 of the Energy Efficiency Directive[4] or other equivalent suitable EU or international standard).
- **GHG emissions avoided** (quantitative, determined according to GHG Protocol[5] calculation methods or other equivalent suitable EU or international standard).
- **improvement of other local environmental conditions** (qualitative or, if quantitative, determined according to methodologies accepted for Environmental Impact Assessments[6] or other equivalent suitable EU or international standard);
- **energy poverty mitigation** (quantitative, determined according to a suitable indicator among those proposed at EU level[7]);
- **social acceptance** (quantitative if possible, describing number of authorities/stakeholders engaged, meetings with citizens, use of local manpower, etc.);
- impact on local economy in terms of creation of workplaces, improvement of living conditions, increase of competitiveness of companies, etc.;
- renewable share (quantitative);

[4] https://publications.jrc.ec.europa.eu/repository/bitstream/JRC99698/report%20on%20eed%20art%207%20-%20publishable.pdf

[5] https://ghgprotocol.org/sites/default/files/standards/ghg-protocol-revised.pdf

[6] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32011L0092

[7] https://ec.europa.eu/energy/sites/ener/files/documents/Selecting%20Indicators%20to%20Measure%20Energy%20Poverty.pdf

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- benefits on the local grid (if applicable);
- replicability and scalability on other islands or archipelagos;
- replicability and scalability on mainland (in case the project can be considered an opportunity to make island a living lab for clean energy solutions for EU as a whole);
- potential of dissemination and communication in order to promote the implemented solution with other islands;
- other indirect impacts not included in the above list.

It is reminded that topics highlighted in bold underlined are those that must be evaluated as positive to allow the proposal reaching the minimum threshold for eligibility.

Moreover, according to eligibility criteria outlined in NESOI D3.1, the proposal shall be characterized by at least two positive impacts out of the first four listed above (primary energy savings, avoided GHG emissions, energy poverty mitigation and improvement of local environmental conditions).

3.5 Project Execution and NESOI Support

This section of the proposal shall focus on the description of:

- requested NESOI support, in terms of activities/competences that the Project promoter intends to procure with the Grant and services that it asks to be provided by the members of the NESOI Consortium;
- readiness of the proposed action: work already carried out (planning done, feasibility studies completed, licenses/permitting obtained, draft contracts or technical/economic proposals available, etc.);
- procurement: procurement in general, contracts already awarded and procedure(s) applied, procurements planned during implementation;
- **timeline of the proposed activities**, prepared according to the template presented in Table 1 for the project and in Table 2 for the technical assistance and including a clear indication of milestones (both in terms of months from the beginning of the project implementation and in absolute terms, i.e. expected date);
- **coherence of NESOI support** in project execution, i.e. how the support requested to NESOI fits into the expected project schedule and helps in unlocking potential for island decarbonization.

It is reminded that topics highlighted in bold underlined are those that must be evaluated as positive to allow the proposal reaching the minimum threshold for eligibility.

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Table 1: Example of Timeline of Proposed Activities

	M1 [dd/mm/yy]	M2 [dd/mm/yy]	M3 [dd/mm/yy]	M4 [dd/mm/yy]	M5 [dd/mm/yy]	…	…	…	…	M12 [dd/mm/yy]
Contract negotiation/ signature										
Planning and design										
Permitting										
Procurement and interaction with technology provider										
Installation/Construction/ Commissioning /Start-up										
Production/Operation										
Monitoring										

Table 2: Example of Timeline of Requested Technical Assistance

	M1 [dd/mm/yy]	M2 [dd/mm/yy]	M3 [dd/mm/yy]	M4 [dd/mm/yy]	M5 [dd/mm/yy]	…	…	…	…	M12 [dd/mm/yy]
Tender preparation										
Tender execution										
TA contract signature										
TA activities deployment										
TA deliverables										
[…]										

3.6 Beneficiary and Island Ecosystem

This section of the proposal shall focus on the description of:

- **coherence of the governance of the project**, in terms of actors involved, roles and responsibilities.
- **project beneficiaries and related capacity**, i.e. track record/experience in other energy transition projects, etc.
- **risk matrix**, prepared according to the template shown in Table 3, thus including details on identified risks and proposed mitigation measures;
- role of the project in the local island context (capitalizing local peculiarities) and in local island energy strategy.

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- identification and engagement of key stakeholders (e.g.: municipality/other local authority, energy agency, DSO, etc.) with specific reference to those who can benefit from the project.

It is reminded that topics highlighted in bold underlined are those that must be evaluated as positive to allow the proposal reaching the minimum threshold for eligibility.

Table 3: Example of Risk Matrix

Description of risk	Probability High-Medium-Low	Impact High-Medium-Low	Proposed risk-mitigation measures

3.7 Attachments

Attachments to the proposal are not subject of direct evaluation but could integrate the proposal with evidence and/or complementary information. Some of the attachments are mandatory and some are not, as specified in the list below:

- declarations on honour for absence of situation of exclusion, absence of conflict of interest and compliance with EU norms and regulations (**all mandatory**, in line with eligibility criteria outlined in NESOI D3.1 on "Definition of eligibility pre-requisites");
- letters of support from relevant public authorities or stakeholders (**mandatory for private entities**, in line with eligibility criteria outlined in NESOI D3.1);
- transition agendas, SEAP, SECAP or other planning documents;
- proofs of secured financing and/or existing agreements (e.g.: with the local DSO for deployment projects interacting with the local grid);
- already existing feasibility studies and/or monitoring data;
- already obtained licenses (for construction, deployment, operation, etc.) or other technical documents;
- maps with simple sketches of the project location.

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4 Selection Criteria for NESOI Erasmus Programme

The present Section focuses on the selection criteria for the participants to the NESOI Erasmus Programme, whose aim is to stimulate staff exchange between islands' staff members.

The proposal must include the following information/documents, which will be subject to the assessment of evaluators:

- curriculum vitae of the candidate;
- motivational letter for the participation to the NESOI Erasmus Programme;
- references in the energy transition field of the hosting institution (and/or curriculum vitae with professional experience in the field of the main contact of the hosting institution);
- purpose, plans and duration for the proposed visit.

The evaluation of the received proposals will follow the same process as for NESOI technical and financial support, with three reviewers that will in this case provide a mark on the following areas:

- suitability of the candidate background and experience for the participation to the programme (technical/financial, language skills, etc.);
- experience and suitability of the hosting institution in the field of energy transition of islands;
- coherence of the proposed activity with NESOI objectives and with EU targets for energy transition of islands;
- consistency of the proposed visit duration and plans with the proposed purposes.

The only attachments foreseen is a letter of support by the hosting organization, which is a plus but is not mandatory for the application. In any case, the applicant is required to provide the letter before the award of the support.

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5 References

- NESOI D3.1, "Definition of the Eligibility Pre-Requisites"
- NESOI D7.2, "Report from the Survey to collect islands' needs"
- JRC, Energy Savings Calculation Methods under Article 7 of the Energy Efficiency Directive, https://publications.jrc.ec.europa.eu/repository/bitstream/JRC99698/report%20on%20eed%20art%207%20-%20publishable.pdf
- The Greenhouse Gas Protocol, "A Corporate Accounting and Reporting Standard", https://ghgprotocol.org/sites/default/files/standards/ghg-protocol-revised.pdf
- EC, Directive 2011/92/EU of the European Parliament and of the Council of 13 December 2011 on the assessment of the effects of certain public and private projects on the environment, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32011L0092
- Trinomics, "Selecting Indicators to Measure Energy Poverty", https://ec.europa.eu/energy/sites/ener/files/documents/Selecting%20Indicators%20to%20Measure%20Energy%20Poverty.pdf

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