



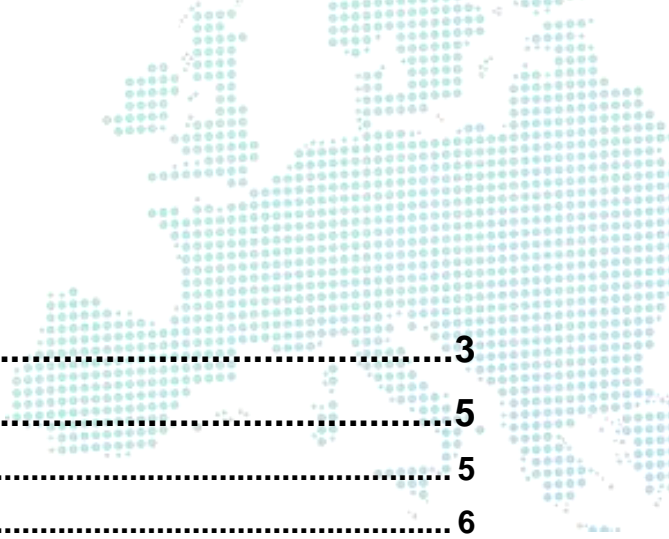
# Call for applications

## Guidelines and selection criteria

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## 0 Executive Summary

Act!onHeat aims to aid municipalities on tasks related to their strategic heating and cooling, as well as their implementation into specific measures that help them reach their decarbonisation targets. In order to do so, the project needs to engage municipalities and evaluate prospective participants, which will be done through a Call for Applications.

The objective of this document is to provide all the necessary information that applicants could need for participating in the Call for Applications, from overall context on the Act!onHeat project to detailing all steps of the application process and finalising the collaboration agreement.

The document has been divided into three main sections:

- A brief overview of the Act!onHeat project and the role of the support facility within the project framework.
- A detailed description of the call for applications including the application process, the main criteria and the selection methodology;
- A definition of how the support facility will be established through the collaboration agreement set up

Even though all sections are important, the content is mainly focused on the application process itself, which has also been split into three main steps depicted in Figure 0.1.

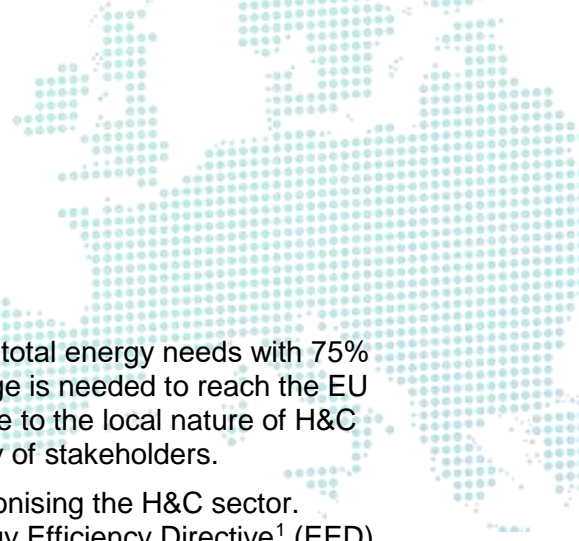


*Figure 0.1 - Steps to be followed by the applicant during the application procedure*

The application will be carried out by completing an online application form which will gather all relevant information to be used to characterise and score the candidates, if needed. Then the consortium will use the characterisation and selection criteria, also described in this document, will be used to select the most relevant applicants. Finally, the selected applicants will be contacted by the consortium partner in charge of providing the specific support (Expert Support Partner) in order to define the support facility and formalise the collaboration agreement.

Lastly, an annex containing a step-by-step walkthrough of the application form has been included to ease the applicant's user journey.

Additionally, a Helpdesk has been created as a way of communicating with applicants so they can voice their doubts or provide further information. This has been made accessible via an email address ([helpdesk@actionheat.eu](mailto:helpdesk@actionheat.eu)) to which applicants, or other interested parties, can direct their comments straight away.



# 1 Introduction

Heating and cooling (H&C) accounts for about half of Europe's total energy needs with 75% still dependent on fossil fuels. Thus, rapid and significant change is needed to reach the EU 2050 goal of net zero greenhouse gas emissions. However, due to the local nature of H&C systems, action has to be taken at local level involving a variety of stakeholders.

Strategic H&C planning is seen as a key instrument for decarbonising the H&C sector. Therefore, an amendment under the 2021 revision of the Energy Efficiency Directive<sup>1</sup> (EED) is dedicated to it. The EC proposes the following: "Member States shall encourage regional and local authorities to prepare local heating and cooling plans at least in municipalities having a total population higher than 50.000" (EU Commission 2021).

However, in most countries strategic H&C planning is still in its infancy. Moreover, strategic H&C planning requires extensive know-how, resources and experience. This is where the Act!onHeat project comes in. The project offers municipalities (or other stakeholders working on their behalf) the opportunity to receive free expert support in strategic H&C planning. For this purpose, the open-source tools Hotmaps and THERMOS are used.

The aim of this document is to describe how municipalities can participate in the Act!onHeat support facility. The document is split into three main sections:

- A brief overview of the Act!onHeat project and the role of the support facility within the project framework.
- A detailed description of the call for applications including the application process, the main criteria and the selection methodology;
- A definition of how the support facility will be established through the collaboration agreement set up

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<sup>1</sup> More information can be found here: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52021PC0558>

## 2 Act!onHeat project

The overall aim of the Act!OnHeat project is to move from planning to action by increasing knowledge, skills and expertise amongst public authorities and other stakeholders across Europe, to enable them to produce strategic heating and cooling decarbonisation plans and initiate more successful projects that deliver low and zero-carbon heating and cooling solutions (e.g. heat networks and area-based building retrofit programmes). The overall objectives of Act!onHeat are therefore that:

1. Strategic heating and cooling planning will be undertaken well by more public authorities across Europe;
2. The quality of strategic heating and cooling plans that they produce will be increased;
3. Strategic heating and cooling plans will help to justify and lead to the implementation of new decarbonisation projects.

These actions will be carried out through the Act!onHeat project consortium, which brings together leading European experts in strategic heat planning, sustainable energy and energy policy analysis (FH-ISI, CSE, TU Wien, Creara and e-think), local governments networking and capacity building (ICLEI), investment support (eclareon, Creara) and socio-technical research (FH-ISI). All partners have extensive experience of working together with local and regional authorities and supporting them in the sustainable energy sector in general. More information on the project partners can be found in the corresponding section of Act!OnHeat website<sup>2</sup>.

### 2.1 H&C planning strategic workflow

To achieve the aforementioned goals, a workflow has been developed, drawing on experiences of strategic processes which have already taken place and which have led to strong heating and cooling plans. For this purpose, a meta-study has been carried out using a combination of literature research, text mining and expert discussions. Success factors of strategic heating and cooling planning have been identified and passed on to the Act!onHeat participants.

The Act!onHeat workflow, which is depicted in Figure 2.1, is presented on the project's website<sup>3</sup>, where each of the sections is explained in further detail. The results of the meta-study will also be published on the project's website<sup>4</sup>.

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<sup>2</sup> [www.actionheat.eu/partners](http://www.actionheat.eu/partners)

<sup>3</sup> [www.actionheat.eu/workflow](http://www.actionheat.eu/workflow)

<sup>4</sup> [www.actionheat.eu/resources](http://www.actionheat.eu/resources)



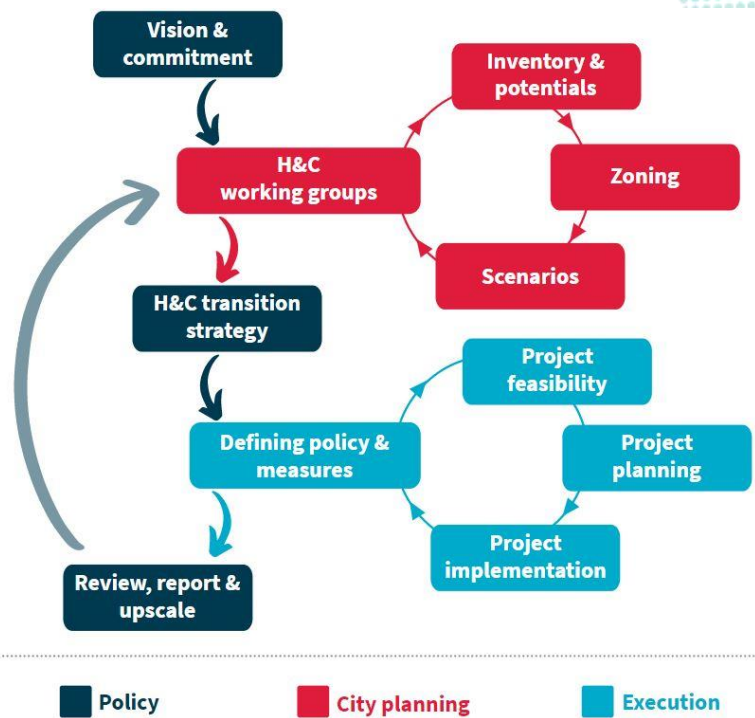


Figure 2.1 - Act!OnHeat Workflow

## 2.2 Act!onHeat methodology

To translate this workflow into action, the Act!onHeat team has designed two separate support facilities taking into account the needs of the municipalities, the available tools and their integrated use. These are:

1. Pathway B1 – Strategic H&C planning
2. Pathway B2 – District Heating and Cooling (DHC) feasibility studies

To help carry out these tasks two sophisticated tools will be used: Hotmaps<sup>5</sup> and THERMOS<sup>6</sup>. These tools, which were developed in previous EU H2020 projects, now exist in open-source format and enable the identification, analysis and comparison of specific heating and cooling options in real local geographies.

For the delivery of these support packages, capacity building materials will be developed, which will add to the already existing materials developed for both tools. Furthermore, ways to integrate use of both tools will be developed based on their joint use, and an integrated user guide will also be made available.

In addition, the actual process – the ongoing delivery of the support packages and engagement with the municipalities – will generate learning which will lead to iterative improvements to the

<sup>5</sup> [www.hotmaps-project.eu](http://www.hotmaps-project.eu)

<sup>6</sup> [www.thermos-project.eu](http://www.thermos-project.eu)



materials (through successive feedback loops). All materials, results, success stories and policy measures resulting from the project will finally be disseminated through targeted actions.

Over the three years of the project, the support packages are intended to help at least 120 municipalities in their strategic heating and cooling planning, initiate at least 30 pre-feasibility studies for individual projects, and identify funding opportunities for at least 15 of these.

## 2.3 Timeline and support provided

In course of the Act!onHeat project an intensive interaction with the target group is envisaged in order to maximise the impact of the project. The interaction is structured into three different levels of intensity:

1. **Support facility:** Intensive support in the development of H&C strategies and roadmaps as well as in the planning of concrete implementation projects and financing will be given to a selected set of organisations / municipalities.
2. **Training programme:** In order to build up further capacity related to structured heating and cooling roadmapping and concrete project development in this field an intensive training programme will be performed. This will be based on several series of webinars and the maintenance of an ambassador community as well as follow a train-the-trainer approach. Further information can be found on the website<sup>7</sup>.
3. **Enabling policy:** A variety of different activities will be performed with the goal to engage a higher number of persons from the target group into the project. This includes roadshow events, workshops and webinars, acceleration dialogues in smaller groups or bilaterally, participation in conferences as well as other promotion like newsletters, press releases, blogs, articles or scientific publications.

The first of these interactions, the support facility, will kick off with the publication of the Call for applications, which will be the first opportunity that interested municipalities/organisations will have to participate in the support facility. This is envisioned to happen in the first quarter of 2022 and will be further explained in the following chapters.

The training programme will start prior to the publication of the call for applications so it can also help with the dissemination efforts. However, all materials (including recordings of the training webinars) will be made available through the project's website.

While the other two levels of interaction have fixed dates and timelines, the efforts for enabling policy will be steadily carried out throughout the project.

The support facility is the most intensive level of interaction and comprises a mix of individual support in bilateral (web) meetings, travels to the supported organisations, webinars as well as

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<sup>7</sup> [www.actionheat.eu/resources](http://www.actionheat.eu/resources)



provision of tailor-made guiding documents and templates. To further understand the areas where Act!onHeat could provide help, it is recommended to review the Product portfolios<sup>8</sup> associated with each support facility.

As the project aims to provide a framework that will continue to be used after the support from Act!onHeat is over, it is expected that project participants will carry out most of the work related to their case study, while the Act!onHeat consortium will provide the necessary training and guidance to do so. This will be concretely described in the collaboration agreement depending on the needs and capacity of each applicant, as well as the availability of resources that the Act!onHeat consortium has at that time.

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<sup>8</sup> [www.actionheat.eu/support-modules](http://www.actionheat.eu/support-modules)





## 3 Applying for the Act!onHeat support facilities

In order to participate in the support facilities defined in the previous chapter an application procedure must be followed. This chapter aims to provide an overview of all relevant information related to this process, starting with the overall application procedure but also covering online forms and significant parameters for candidate evaluation.

Additionally, there are complementary documents that might offer further insight on topics related to the selection process. In this case, links to the specific documents will be provided below to make it easier for applicants wanting to expand this information.

### 3.1 Application procedure

The application process comprises all necessary interactions between the Act!onHeat consortium and the applicants from project dissemination to the formalisation of the collaboration agreement. The process also aims to evaluate applicants' ability to self-implement the Act!onHeat methodology and the corresponding level of expert support that may be required.

The procedure comprises 4 different phases, which have been differentiated according to their objective and who carries them out:

1. **Dissemination phase:** the objective of this task is broadcasting all the necessary information to understand the call for application and to make available additional content that might be relevant in order to reach the highest number of applicants
2. **Application phase:** aims to gather all necessary information for applicant characterisation and evaluation, but also for the verification of the applicant's relation to municipalities
3. **Selection phase:** the main goal will be to assess the submitted application forms and to select applicants as well as offered support
4. **Project definition phase:** the purpose of this task is to agree on a common framework and content of support for individual applicants. It should also clarify commitment of both the applicant and the supporting organisation through a collaboration agreement.

Even though the dissemination phase will be emphasised at the beginning, it is expected to be an ongoing effort carried out by the Act!onHeat consortium, while the other stages of the process will have fixed timelines kicking off with the publication of the call for applications. Figure 3.1 depicts the different phases of the application procedure and provides a tentative timeline.

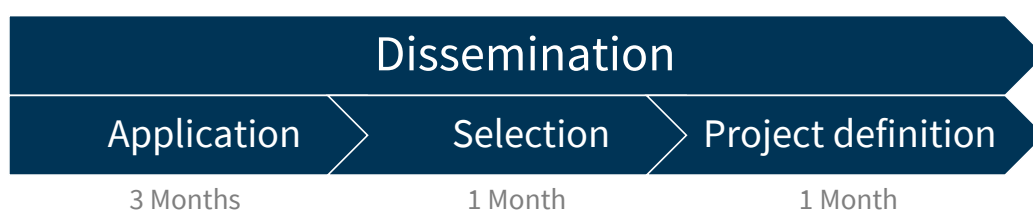


Figure 3.1 – Stages in the application procedure



### 3.1.1 Dissemination Phase



This phase aims at disseminating the information related to the Call for Applications publication and the availability of materials in order to achieve the highest number of applications possible. This phase aims to promote the project through different platforms such as:

- Project media channels (Website, LinkedIn, Twitter, ...)
- Presentations on events related to District Heating and Cooling (DHC) networks and decarbonisation of the heating and cooling (H&C) sector
- Webinars and info sessions further detailing relevant aspects of the project such as attainable goals, methodology, expected support, etc

Existing materials, as well as future events and conferences, can be found at the project’s website<sup>9</sup>.

The Act!onHeat consortium members will be responsible for developing the dissemination structure, ensuring that it has covered the project’s geographical focus. Also, as a means of communication with applicants, it is envisioned to develop a helpdesk that allows for additional information requests. The helpdesk can be accessed directly by writing an email to [helpdesk@actionheat.eu](mailto:helpdesk@actionheat.eu).

Dissemination will be an ongoing task to encourage applicants to apply for support throughout the project according to the resources available.

### 3.1.2 Application phase



Once potential applicants have gained interest in the project and have understood how the offered support activities could help their specific needs, the next step will be to move on to the Application Phase.

The main aim of this task are both to verify the applicant’s ability to verify the applicants interest and commitment. Commitment is relevant as applicant will need to get familiar with the provided tools. Also, additional objectives are the verification of a strong link with the municipality and the

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<sup>9</sup> [www.actionheat.eu](http://www.actionheat.eu)

gathering of all the necessary information to characterise and score the applicant. This will be done using an online application form, available on the project’s website<sup>10</sup>.

The structure of the online application form can be found in Figure 3.2. The different parts of the form will be explained below, while a detailed step-by-step walkthrough using pictures of possible outcomes depending on the applicant’s answers can be found in the annex to this document. The helpdesk described in the previous section could also be used to provide ad hoc support to applicants throughout the application procedure.

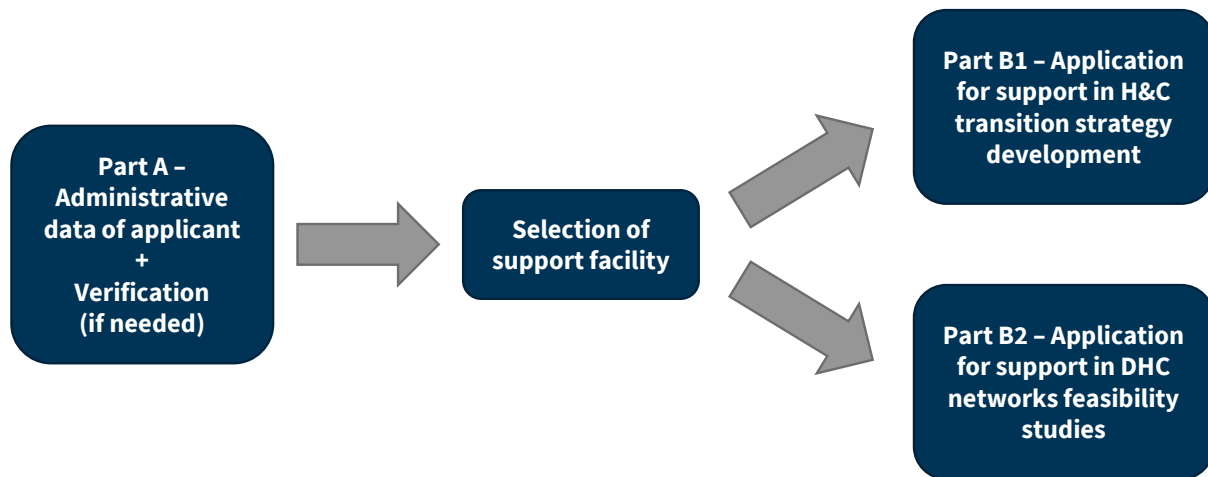


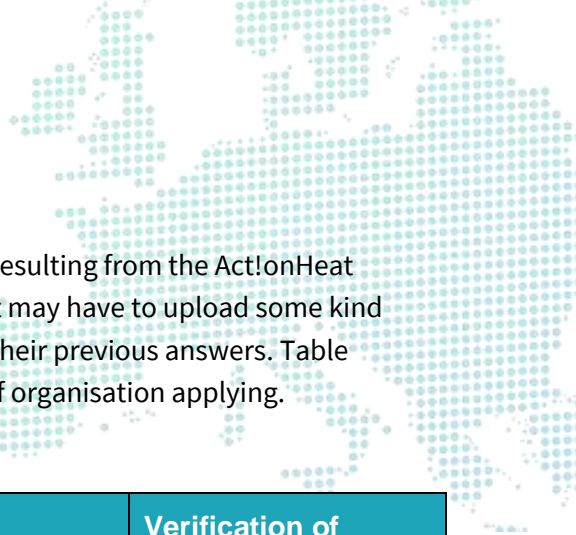
Figure 3.2 - Depiction of the application stage

### 3.1.2.1 Part A - Administrative information and verification of relation to municipalities

The first part to be filled out in the application form is the administrative information, which aims to gather general information on the applicant organisation, as well as contact information to enable swift communication between the consortium and the applicant. This section is compulsory, except for the alternative contact information, which is optional. Examples of the information that applicants could be asked to provide are:

- For the organisation
  - Country
  - Address
  - Type of organisation
  - Language
- For the main contact
  - Name
  - Position
  - Email
  - Phone number

<sup>10</sup> [www.actionheat.eu/Call\\_for\\_applicants](http://www.actionheat.eu/Call_for_applicants)



Also, as one of the main objectives of the project is for the outputs resulting from the Act!onHeat support should lead to tangible measures or projects, the applicant may have to upload some kind of verification of their relationship to municipalities depending on their previous answers. Table 3.1 exemplifies different types of evidence depending on the type of organisation applying.

Type of organisation	Legal status	Relation to municipalities	Verification of relation to municipalities
An energy agency – regional/ local (/national)	Public entity, private entity (e.g. owned by public entity)	E.g. specific programmes for municipalities are organised; externally funded projects with municipalities	Not needed
A network of cities / municipalities	Public entity, private entity (e.g. owned by public entity)	Municipalities assisted in certain questions	Actual list of Members
A city (/municipality)	Public entity	-	Not needed
A consultant	Private entity	Services for municipalities are offered	Official document of at least 2 past services for a municipality or a Letter of Interest (LoI) from a municipality

*Table 3.1 - Required verification depending on the type of organisation*

Where the verification of relation to municipalities is a Letter of Interest (LoI), a word document containing a template will be available for download, where the specific sections to be modified will be highlighted. The applicant should then sign that letter and upload it in order progress with the application.

Lastly, the candidate must choose the support facility to apply for:

- Part B1 – Support on strategic H&C planning
- Part B2 – Support on DHC networks feasibility studies

The form allows the selection of both support facilities, making both complementary sections pop up. As a clarification, if both sections are selected, they will not be tackled simultaneously during the Act!onHeat support facility but rather sequentially, undergoing the strategic H&C planning first and then moving on to the DHC network feasibility study.



However, applications will be evaluated on an individual basis so if a candidate believes that the level of development or characteristics of their proposed project allow for parallel engagement of the support facilities they are encouraged to discuss this via the helpdesk route.

### 3.1.2.2 Part B – Support facility questionnaire

The form will be divided into different sections based on the required information. Most of the section titles are accompanied by a short explanation of the nature of the information being asked for. The structure of the questionnaire depends on the support facility that is being applied for, for example, Part B1 is structured based on the different modules offered in the strategic H&C planning support facility, also using the Hotmaps database and toolbox. Similarly, Part B2 is categorised according to the relevance of the information with regards to developing a DHC network feasibility case study via the THERMOS tool. More information on the possible services to be carried out with each tool can be found in each of their product portfolios.<sup>11</sup> Detailed descriptions on how to carry out these tasks are also available on the Hotmaps wiki<sup>12</sup> and in the THERMOS Replication Guide<sup>13</sup>.

The information submitted in the questionnaire will be used to perform the scoring that allows to rank the application relative to others and to tailor the support facility to the applicant's needs. Further details will be explained in the next chapter, where a list of the selection criteria will also be provided.

### 3.1.3 Selection phase



Once the Call for Applications has been closed, the consortium will proceed to analyse the information received, select applicants to be supported and define the support that will be offered to applicants/participants. This will be done according to different selection criteria, which will be split into:

- Part B1 – Strategic H&C planning
  - Characterisation criteria
- Part B2 – DHC networks feasibility studies
  - Main selection criteria
  - Additional criteria

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<sup>11</sup> [www.actionheat.eu/support-modules](http://www.actionheat.eu/support-modules)

<sup>12</sup> [www.wiki.hotmaps.eu/Home](http://www.wiki.hotmaps.eu/Home)

<sup>13</sup> [www.thermos-project.eu/tool-support/publications/](http://www.thermos-project.eu/tool-support/publications/)





The evaluation of the applicants will depend on the requested support, which means that while pathway B1 will use the application data to divide applicants into groups depending on their expertise and interests, pathway B2 will use it to perform a scoring which will enable the selection of the most suitable applicants.

Pathway B1 envisions the creation of two different support methodologies: individual support and group support. Individual support will be mainly aimed at applicants with a high replication potential or a high impact in H&C transformation. In the group support activities applicants will be grouped together alongside different topics and action points. Applicants with higher level of experience in a certain topic might be invited as good practise examples in the group support activities. The exact number of action points and the related mix of support activities that will be provided to participants is not fixed. This will be compiled by the Act!onHeat support team and bilaterally discussed between applicants and supporters in the project definition phase.

Pathway B2 plans to provide individual support to all selected applicants, as the projects to be carried out are more specific and will need more tailored assistance. In this way, every selected applicant will be allocated a project partner who will oversee their project and provide support whenever it is needed.

Based on the differences between support facility B1 and B2, it is expected for the Hotmaps support facility (B1) to be able to accommodate a higher number of applicants with differing levels of support intensity, while the THERMOS facility (B2) will need to be more restrictive.

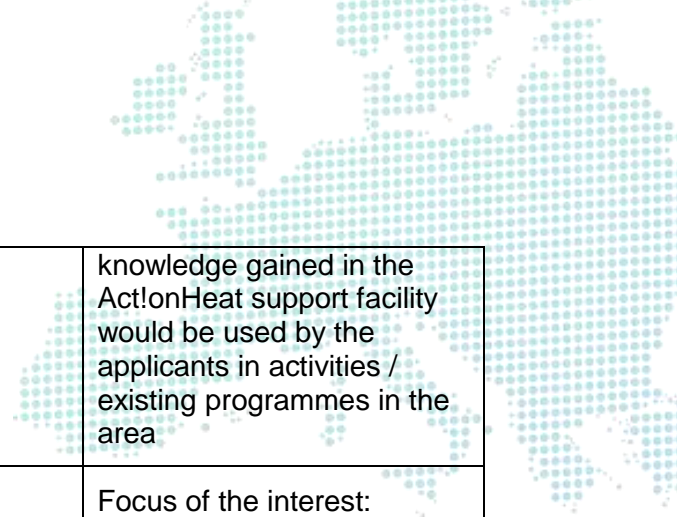
It is worth mentioning that the amount and detail of the information provided in the application form will be used as a means of verification of the role of applicants in relation to municipalities and its commitment towards the implementation of H&C plans.

Also, the support facility within the Act!onHeat project aims to support as many municipalities as possible, therefore, the higher the number of municipalities involved per application, the more intensive and individualised will be the support offered.

### 3.1.3.1 Selection criteria

This chapter aims to provide an overview of the the characterisation criteria (Part B1) and selection criteria (Part B2) used for applicant evaluation, as well as a short description which helps the applicant to better understand them.

Part B1 – Strategic H&C planning		
Characterisation criteria		
<b>Intended impact / Replication potential</b>	<b>Quantification of replication potential</b>	Number of inhabitants in the municipality/region, energy demand for H&C and CO <sub>2</sub> emissions for H&C in the area
	<b>Qualitative description of</b>	Short description of how



	<b>intended impact</b>	knowledge gained in the Act!onHeat support facility would be used by the applicants in activities / existing programmes in the area
<b>Action points</b>	<b>Overall Interest</b>	Focus of the interest: heating, cooling or a combination of both
	<b>Interest in specific action points</b>	Rating of the level of interest for each specific action point
	<b>Level of experience / status</b>	Status of the applicants' knowledge regarding each specific topic for which interest is declared (level of understanding / existing information towards the specific topic in the region of interest)
	<b>Qualitative description of interest / need</b>	A short description of status, interest and need in the module / selected action points for which interest is declared
<b>Part B2 – DHC networks feasibility studies</b>		
<b>Main selection criteria</b>		
<b>Data availability</b>	<b>Thermal Demand</b>	Data on heating and cooling demand in target buildings
	<b>GIS</b>	Availability of files containing the location and geometry of buildings and network paths in the target area
	<b>Energy supply</b>	Data regarding the main characteristics (location, capacity, fuel,...) of the energy supply
	<b>Economic</b>	Availability of information such as the costs of energy supply, piping, civil works or the market tariffs



<b>Expected level of involvement</b>	<b>Number of dedicated people</b>	FTE resources dedicated to the project
	<b>Familiarity with data processing tools Excel and SQL (if needed)</b>	Capacity to use the needed tools
	<b>Familiarity with GIS and CAD (if needed)</b>	Capacity to use the needed tools
	<b>HOTMAPS / THERMOS Adoption potential</b>	Assurance that users intend to implement the Act!onHeat methodology once contact with the consortium is over
<b>Potential for deployment</b>	<b>Project feasibility</b>	Physical or technological restraints for the development
	<b>Disposition to deployment</b>	Other economical or regulatory barriers for the project to become a reality
	<b>Governmental support/ expected to fall into future policy frameworks</b>	Tangible support to this project specifically - Contact with municipality
<b>Additional selection criteria</b>		
<b>Demand characteristics</b>	<b>Demand Covered</b>	Annual demand in GWh
	<b>Number of demands</b>	Number of independent buildings or demand points connected
	<b>Demand distribution</b>	Use of the proposed buildings
<b>Technology Used</b>	<b>Fuel used</b>	Specific low or zero carbon fuel used to run the heat supply
	<b>Supply technology</b>	Low or zero carbon technology used to produce the heating power
<b>Case Study (CS)</b>	<b>Use Case (UC) Selection</b>	Refers to the THERMOS UC that the CS is aiming to replicate



	<b>Objective</b>	Developers' motivation to carry out the CS
	<b>Beneficiary</b>	Type of company carrying out the development
	<b>Land Ownership</b>	Ownership of the land where the project is expected to be carried out
<b>Location</b>	<b>Country</b>	
	<b>Town size</b>	Measured in number of inhabitants
	<b>Placement</b>	Refers to the network's location in relation to the city
	<b>Network distribution</b>	Network's expected connections
	<b>Project extension</b>	Development's overall area in km <sup>2</sup>
<b>Implementation Level</b>	<b>DHC Familiarity</b>	Existence of other DHC examples in the city/country
	<b>Supply technology</b>	Level of development of the heat supply
	<b>DHC policy</b>	Real support schemes covering the project at a local, regional or national level

*Table 3.2 - Selection criteria*

### 3.1.3.2 Final selection

The information provided by the applicants regarding the characterisation and selection criteria is used in the following way depending on the support facility for which an application is handed in.

**Applications for support facility B1 (strategic H&C planning) will be processed in the following way:**

The information from the application forms is used to cluster applicants according to declared interest and level of experience / status in declared topics. The information provided regarding



intended impact / replication potential together with the qualitative description of interest and needs and the number of applicants per topic will be used to define a) the proposed type of support (individual support vs. group support) and b) the suggested selection of content within the support projects. This will be done jointly within the support team of Act!onHeat. The aim is that each applicant at least is offered to participate in a group support activity. The amount of individual support projects possible to be offered will be limited. The probability that individual support can be offered is remarkably influenced by the information provided in the section intended impact / replication potential.

**Applications for support facility B2 (DHC networks feasibility studies) will be processed in the following way:**

After scoring the applications the Expert Support Partner will review the proposed ranking, list those that are deemed suitable, and discuss their decision with the rest of the Act!onHeat consortium. This is done to assure that the workload is aligned with the available support facility resources, and the maximum level of diversity is achieved.

The selected applicants will then be allocated their Expert Support Partner(s) and contacted in order to communicate their acceptance into the project and start to formalise the agreement. Unparticipants will also be contacted to provide feedback on their score so they can improve it in case they want to take part in following application calls.

### 3.1.4 Project definition



The last phase of the selection process will be to describe the project with a level of detail that allows both the Act!onHeat consortium and the applicant to evaluate and identify the resources needed to complete the required tasks. The procedure will be different depending on the support facility that is applied for, as described below.

**Applications for support facility B1 (strategic H&C planning):**

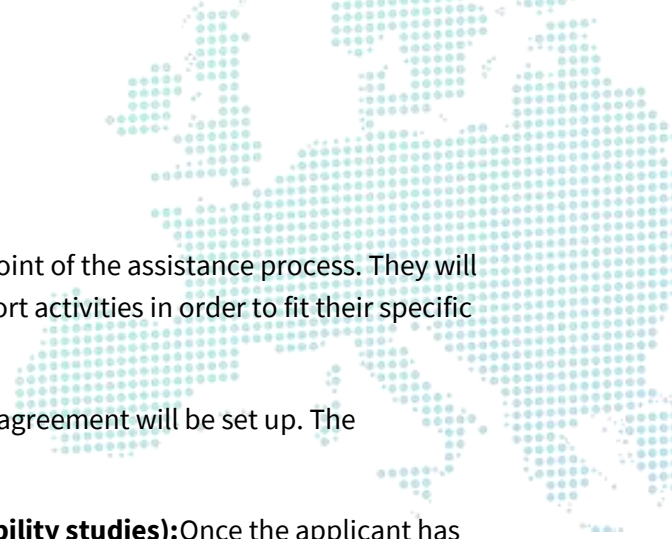
Applicants will be contacted by assigned supporters from the Act!onHeat team to discuss the details of the offered support. Open questions will be clarified, and a fact sheet of support will be prepared for each municipality for which support is envisaged by the applicant<sup>14</sup>. This will contain basic information about the municipalities as well as the type of support to be received within the support facility. The fact sheets will be signed by both the applicant and the supporter. Templates of Act!onHeat fact sheets for Support facility B1 can be found here<sup>15</sup>.

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<sup>14</sup> Single applicants can also assist more than one municipality and thus fill and sign several fact sheets. A higher number of fact sheets per applicant increase the probability of receiving individual support.

<sup>15</sup> [www.actionheat.eu/resources/support-facility-b1-factsheet](http://www.actionheat.eu/resources/support-facility-b1-factsheet)





For applicants receiving group support this is the starting point of the assistance process. They will later on be contacted to define the focus of the group support activities in order to fit their specific needs.

For applicants receiving individual support a collaboration agreement will be set up. The procedure that will be followed is described in chapter 4.

**Applications for support facility B2 (DHC networks feasibility studies):** Once the applicant has been notified of their acceptance, the responsible partner/ assigned supporter will start the discussions regarding the definition of the collaboration agreement. This will cover aspects such as:

- Scope of the project and expected results
- Specific tasks and deliverables (if needed)
- Timeline with relevant milestones
- Support provided by the Act!onHeat consortium
- Resource capacity contribution expected from the participant
- Number and frequency of meetings between the consortium responsible and the participant
- Expected quality of the delivered information

Also, in case there are any confidentiality issues, a Non-Disclosure Agreement (NDA) or Data Sharing Agreement will be signed between the participant and the Act!onHeat consortium.

Lastly, in order to formalise this commitment, the collaboration agreement specifying all of this information will be defined and signed by both the Expert Support Partner and the participant. This document will be considered Memorandum of Understanding (MoU) and act as an overall framework to which both the Act!onHeat consortium and the participant can refer to in case.

Following this, and prior to commencement of support under facility B2, a collaboration agreement will be set up according to the procedure described in the following chapter.



## 4 Collaboration agreement set up

Once the applicant selection process has been completed (for individual support in facility B1 and for general support in facility B2), the consortium Expert Support Partner for providing the support facility (Expert Support Partner) will contact each of the selected participants to hold bilateral meetings to agree on significant aspects of the support project.

This is done to ensure that the support provided is tailored to the applicants' needs but also to set up a terms of reference which helps both parties understand the workload and future tasks to be developed, allowing each of them to allocate the necessary resources and plan the first specific actions to be undertaken.

This task should take no longer than a month and is likely to require meetings at the start and end of this period which should be scheduled as soon as possible,

### 4.1 Scope and timeline

Depending on the type of organisation and the support facility that has been applied for (including the integration of both) the scope of the project will need to be defined in the collaboration agreement. This will vary from one project to another, but it will mainly cover the geographical area of the project as well as the overall goal to be achieved, taking into consideration the specific objectives of the city/region to be covered.

Also, the extent to which these actions will be developed during roll-out of the Act!onHeat support facility and beyond should also be described, specifying tangible subtasks which help fulfil the project's objective.

This will allow to generate a tentative timeline with specific milestones and due dates. It is envisioned that the timespan of activities under a single support facility could go up to a year, and up to two consecutive years if the integrated implementation of both support facilities is foreseen. As the project aims to create a quick impact by implementing these actions into the planning chain as soon as possible, the timeline could be shortened in order to accommodate the applicants' needs.

Lastly, on the consortium side, there are certain outputs that are expected to be produced which will vary depending on the support facility. For example, when carrying out the DHC feasibility studies a document describing the results, as well as the assumptions and the process that led to them, is expected.

The participant could also define relevant outputs that they would like to take from the support facility. This does not mean that the work related to producing these outputs will definitely be carried out by the consortium or during the project itself, but it will be taken into account when designing the workflow implementation in a way that it can be more easily tackled. Also, the consortium could provide methodologies based on previous experience that will help shape the desired input and integrate them into the project's workflow.



## 4.2 Implementation of the Act!onHeat workflow

Once the project's objective and overall goals have been defined, as well as tasks and a tentative timeline, the Act!onHeat workflow will be applied to establish how the project could be enacted from planning to action and how this should be reflected in the collaboration agreement. This not only includes identifying areas where the Act!onHeat tools could help the project, but also the set-up of complementary actions to be undertaken in order to achieve a positive and swift impact.

The actions to be undertaken from the planning standpoint will vary depending on the project's needs and goals, but the most important aspects that should be covered by all of them (and reflected in the collaboration agreement) are the identification of relevant stakeholders and the definition of inputs to be gathered:

- The development of a stakeholder group which oversees the evolution of the project has been identified as one of the most relevant characteristics of a successful energy planning project. On this note, the stakeholder group should be created as soon as possible and participate in the first steps of the planning process.

The definition of the project carried out in previous steps should allow for the identification of an initial group of stakeholders, that could be increased as the project moves on. This will enable participants to start contacting them in order to test their interest in taking part in the project from the advisory standpoint.

- Also, to ensure the project's advancement on the first stages of development, the primary inputs to be gathered should be defined. The different tools used in the Act!onHeat workflow need specific inputs in order to provide the expected results.

Based in previous experience, some of these inputs could be hard to get and could need a previous treatment of accessible data. The discussion of these inputs as well as methodologies to reach them should be discussed by the consortium and the applicant beforehand, thus allowing the applicants to start seeking these inputs even before the project has formally started.

Last of all, certain projects which use proprietary information from a public or private entity, might need for the consortium to sign a Non Disclosure Agreement (NDA) in order for this information to be shared. This will be done by the Expert Support Partner, who will sign the agreement as a representative of the consortium as whole, as a means to speed up data-gathering efforts.

## 4.3 Development of a support structure from the Act!onHeat consortium

Finally, the participant and the Expert Support Partner will need to specifically define the support to be provided by the Act!onHeat support facility based on the previous project definition as well as on the availability of resources. This will include, but not be restricted to:

- Task distribution: designate responsibilities for carrying out each of the subtasks that have been defined as well as the extent to which they will be covered and possible support that might be expected
- Follow-up meetings: depending on the kind of support to be provided (individual or group) the frequency and duration of the follow-up meetings should be established

This will, on one side, allow the consortium to evaluate the work expected to be done by the participant and, on the other, understand the support that could be expected for task development and the necessary resources for the development of the project. This also has the objective of allowing participants to assess and allocate the resources, which shall also be fixed in the agreement.

This phase will end with the signing of the collaboration agreement by both parties. As it has been already mentioned, this document will be considered Memorandum of Understanding (MoU) and could be used to end the support facility on any of the sides if they feel that the other party is not fulfilling their commitment.



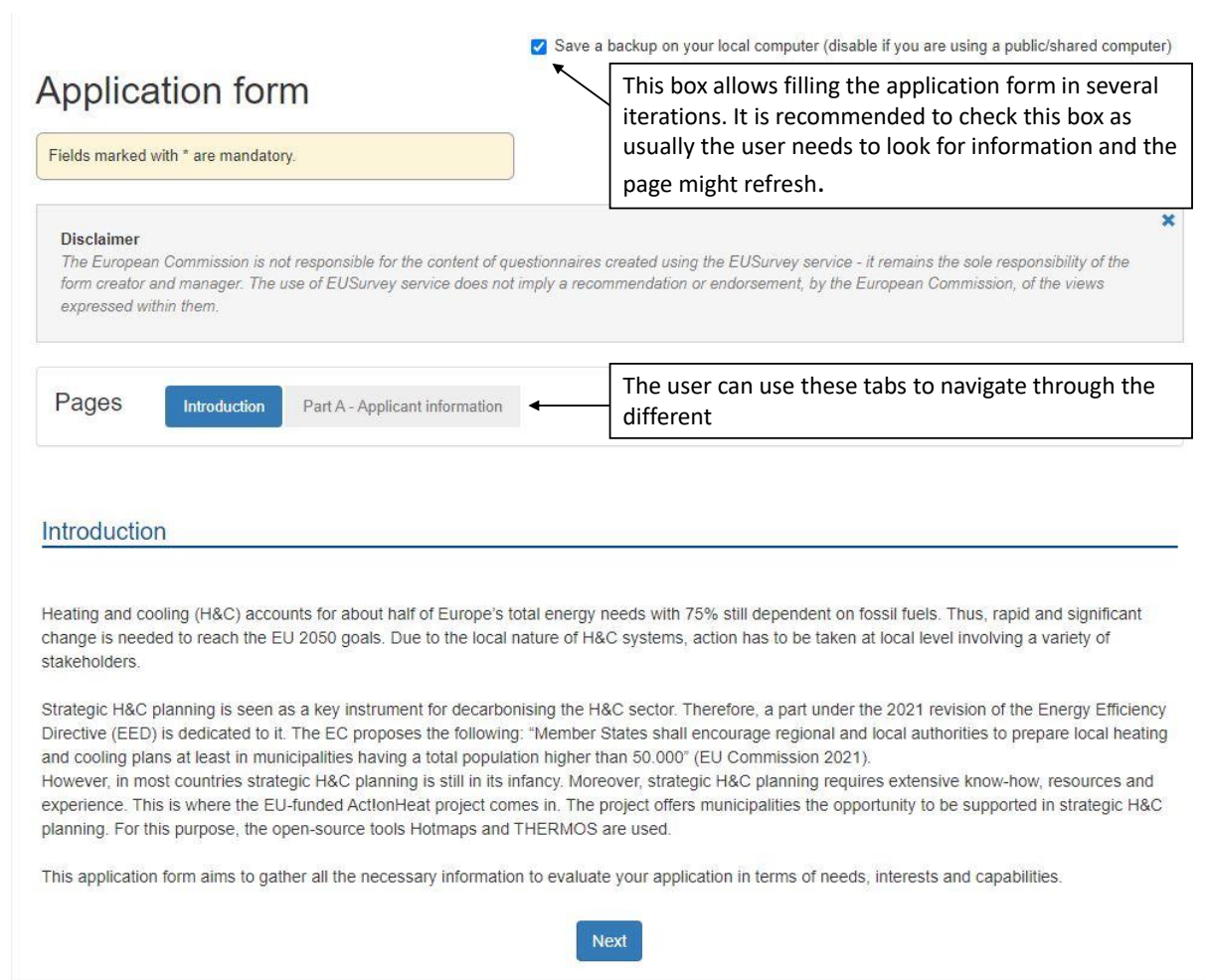


# 1 Annex A: Application form walkthrough

This annex provides a step-by-step walkthrough of the application form, aiming to ease the applicant’s user journey and to solve possible doubts that may appear when completing the form. This chapter contains screenshots of the different sections that could be found, which may have relevant tips for filling the form in a swift way. However, if applicants have further doubts, these can always be addressed by contacting the project’s helpdesk.

## 1.1 Steps for the completion of the Application Form

1. The application form begins with an overall introduction which presents the overall project aim and how it relates to the European Commission (EC) goals, as well as the objective of the application form. The applicant can access Part A just by pressing the “Next” button.



The screenshot shows the 'Application form' interface. At the top right, there is a checked checkbox labeled 'Save a backup on your local computer (disable if you are using a public/shared computer)'. A callout box points to this checkbox with the text: 'This box allows filling the application form in several iterations. It is recommended to check this box as usually the user needs to look for information and the page might refresh.' Below this is a 'Disclaimer' section with a close button (X). At the bottom, there are two navigation tabs: 'Introduction' (active) and 'Part A - Applicant information'. A callout box points to these tabs with the text: 'The user can use these tabs to navigate through the different'. The main content area is titled 'Introduction' and contains text about H&C energy needs and the project's goal. At the bottom of the content area is a blue 'Next' button.





- The next part to be showed is the applicant information, which should be filled independently form the support facility that is being asked for.

### Part A - Applicant information

This section aims to gather general information about the applicant, as well as all necessary contact information to reach out to the selected energy planners.

Also, depending on the selected type of organisation, you will be asked for some type of proof of verification in case which will be compulsory to move forward with the application.

#### Applicant details

##### General information

\* Name of the organisation

\* Country

\* Language

The support facility will only be provided in English, but the Language box could be used for assigning a consortium partner which could also provide support in that language

\* Address

\* Type of organisation

This field is required.

Depending on the type of organisation selected, several different sections could pop up

- If the “Network of cities/municipalities” type of organisation is selected, a section asking for a list of municipalities will appear.

##### Verification of relation to municipalities

\* As the “Network of cities/municipalities” type of organisation has been chosen, a list of the actual members must be submitted along with an indication of the relationship between the municipalities. Please, upload your documents using the section below.

- If the “Consultant” type of organisation is selected, a section asking for either a Letter of Interest from the municipality or official documents for two past services for municipalities will appear. In this section a template for the Letter of Interest can also be downloaded.

##### Verification of relation to municipalities

\* As the “Consultant” type of organisation has been chosen, a Letter of Interest from a municipality or official documents on at least two past services for municipalities must be submitted as proof of relation to municipalities. Please, upload your documents using the section below.

A template for the LOI could be downloaded here

[Act\\_onHeat\\_Letter\\_of\\_Intent\\_for\\_municipalities\\_3.0.docx](#)



5. The next section shown in Part A is the contact information for the company member which will interact with the consortium. Also, as this will be used to reach successful applicants, the possibility of adding information for an additional contact is provided, even though it is not mandatory.

Contact information

**Main contact**

\* Contact name

\* Position

\* Email

\* Phone

**Alternative contact**

Contact name

Position

Email

Phone

6. The last section of Part A is a multiple choice for the selection of the desired support facility. Depending on the applicant's answer, one or several more parts for the application will appear.

Selection of support facility

\* Please select the support facility you would like to apply to (multiple choice allowed)

- H&C transition strategy development
- Project feasibility study

Previous

Next



- In case both support facilities have been selected, the first part to be filled is Part B1, corresponding to the support in heating or cooling transition development. The first section is a brief introduction explaining what could be expected from this support facility as well as some relevant comments on applicant evaluation and a link to the specific part of the Act!onHeat website where all this information could be expanded.

Pages

Introduction	Part A - Applicant information	Part B1 - Support in H/C transition strategy development
Part B2 - Support in project feasibility study		

In this example, as both support facilities have been selected, two more tabs can be found in the menu at the top of the screen

### Part B1 - Support in H&C transition strategy development

The support facility within the Horizon 2020 project Act!onHeat aims to support as many municipalities as possible. Therefore, **the higher the number of municipalities to be assisted** with outputs from the Act!onHeat support facility, **the more intensive and individualised will be the support offered**. Before starting the support, you will need to **provide one assistance letter** including descriptive data **for each municipality** that will receive support. The amount and detail of the information provided will be used as a means of verification of your role in relation to the municipality and your commitment towards the implementation of H&C plans.

In the support facility for H&C transition strategy development within the Act!onHeat project successful applicants will be assisted in the development of transformation strategies to decarbonise heating and cooling. The spectrum ranges from first steps, overview and best practice exchange to assistance in detailed questions on specific topics. A focus can lie on buildings or district heating / cooling analysis, inventory and potentials analysis, zoning approaches or scenario development, or on the overall process including all steps in strategy development. Quantitative assessment will be assisted with the free Open Source database and toolbox Hotmaps.

More information about the provided assistance in this part of the Act!onHeat support facility can be found [here](#).



8. The next section of Part B1 is the one corresponding to the Intended impact/Replication potential. The only mandatory field in this section is the number of inhabitants in the municipality or, in case there is more than one municipality to be covered, the mean number. Even though most fields are optional, it is worth saying that the amount of information provided will also be valued when assessing the applicants.

Intended impact/Replication potential

*Please describe the H&C planning activities you are involved in, and which could benefit from the Act!onHeat support*

Region of (intended) activity

\* Number of inhabitants in the municipality

If known, please supply the following information:

Total demand for H&C in the area [GWh/yr] ⓘ

Total CO2 emissions for H&C [Mt/yr]

Please describe your activities or programmes in which you would use Act!onHeat support

*500 character(s) maximum*

0 out of 500 characters used.





9. The last section of Part B1 is the evaluation of needs and knowledge for every action point listed in the product portfolio<sup>16</sup>.

Action points - Needs and knowledge description

\* Please describe your interest

- Only interested in heating
- Mostly interested in heating, but also in cooling
- Equally interested in heating and cooling
- Mostly interested in cooling, but also in heating
- Only interested in cooling

Module 1 - Heat and Cold transition strategy

Please rate your interest / need in the actions points within this module (0=no interest, 5=high interest)

	0	1	2	3	4	5
* Start strategic heating and cooling (H&C) planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Develop a renovation strategy for the (local/regional) building stock	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Develop a heating and cooling strategy for the city / region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Module 2 - Inventory and potentials

Please rate your interest / need in the actions points within this module (0=no interest, 5=high interest)

	0	1	2	3	4	5
* Develop a building stock and heat / cold demand inventory	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Compile potentials of renewable energy to supply H&C demand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Compile potentials for saving heat demand / avoiding cold demand in buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Compile potentials for waste heat / set up a waste heat cadastre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<sup>16</sup> XXXX (this is supposed to be the URL where product portfolios could be found)





10. For every action point in each module where the interest is greater than 0, a single choice question asking for the current level of experience regarding that particular action point will pop up. Also, a box allowing the applicant to explain their interest or need for all action points selected will appear at the bottom of the screen.

Module 4 - Scenarios

Please rate your interest / need in the actions points within this module (0=no interest, 5=high interest)

	0	1	2	3	4	5
* Develop and assess scenarios for heating and cooling at local level	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Develop scenarios of future heat and cold demand	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Develop scenarios for individual supply	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Develop scenarios for district heating / cooling	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Develop and assess scenarios for heating and cooling at local level**


\* Please rate your level of experience / status in the context of the action point

- Starting (only basic knowledge, no activities started)
- Advancing (topic is understood, basic data is available, first analyses have been made)
- Detailed sub-questions (The topic is well understood, and activities are implemented; However, we have detailed questions related to some of the analyses)

**Develop scenarios of future heat and cold demand**

\* Please rate your level of experience / status in the context of the action point

- Starting (only basic knowledge, no activities started)
- Advancing (topic is understood, basic data is available, first analyses have been made)
- Detailed sub-questions (The topic is well understood, and activities are implemented; However, we have detailed questions related to some of the analyses)

Please describe your interest / need in the actions points within this module 

500 character(s) maximum

0 out of 500 characters used.



11. The last part of the application form will be Part B2 covering the support in project feasibility studies. To begin this section, a brief introduction on the objective of the information gathered, as well as the difference between the different sections, could be found.

Pages

Introduction	Part A - Applicant information	Part B1 - Support in H/C transition strategy development
<b>Part B2 - Support in project feasibility study</b>		

## Part B2 - Support in project feasibility study

This section aims to gather all necessary information to score applicants and characterise the future District Heating or Cooling (DHC) network to be developed using the THERMOS software.

This will be done using predefined selection criteria, which are split into two categories:

- **Main selection criteria:** they are compulsory and will be used to assign a score to each applicant
- **Additional selection criteria:** they are optional and will be used to compare applicants and achieve the maximum level of diversity among project participants

It is also with mentioning that, in the same way that in Part B1, the amount and detail of the information provided will be used as a means of verification of your role in relation to the municipality and your commitment towards the implementation of H&C plans.



12. The next section to appear in Part B2 is the one related to the main selection criteria. This section is composed by single choice questions that are marked as compulsory, as they will be used to score the candidates.

Main selection criteria

Data availability - *Please provide an overview of the data that you think will be available for your project*

\* Thermal demand - *Data about H&C demand in target buildings*

- Real demand data based on metering or bills
- Benchmarks/ratios
- Other demand estimations
- No data

A brief explanation on the nature of the information being asked for could be found in italics after the title

\* GIS - *Files containing the geometry of buildings and network paths in the target location*

- Geojson, shp, files for both buildings and network paths
- CAD Data of buildings and roads
- Open Street Maps (OSM) contains all buildings and streets
- No data, OSM of the area is missing several buildings

\* Energy supply - *Supply characteristics (location, size, supply technology, fuel,...) known*

- The characteristics of the supply have already been fixed
- The characteristics of the supply have not been fixed, but there is a strong idea on major parameters
- The characteristics of the supply are unknown, but some research has been conducted and there is an idea on options to be considered
- The characteristics of the supply are unknown, no research has been conducted on this topic and no other estimations are considered

\* Economic parameters - *Data related to costs (supply, piping, civil works, tariffs, connection, pumping, insulation, individual systems, emissions,...)*

- Multiple consistent inputs - Great amount of data for both the main variables and the complementary ones
- Single consistent inputs - Sufficient amount data for both the main variables and the complementary ones
- Single inputs - Sufficient amount data for the main variables, but not the complementary ones
- No inputs



13. The last section of Part B2 corresponds to the additional criteria. These questions, which have different input format (single choice, multiple choice, number field,...), are optional as they will only be used to complement the information obtained in the main selection criteria. However, similarly to Part B1, the amount of information provided by the applicant will be positively considered when assessing the application.

Additional criteria

Demand characteristics - *Please provide figures or estimations on the main parameters of the demand that plans to be covered*

Yearly heat demand covered (GWh)

Number of demands/buildings covered

What does the figure above represent?

- Buildings
- Demands

Demand distribution - *Economic sector/s comprehended in the covered demand (Select as many as needed)* ?

- Residential
- Tertiary
- Industrial

Technology used - *Please provide further information on the expected technology for demand coverage*

Selected supply technology - *Technology used to produce the heating power (Boiler, Heat pumps,...)*

Selected fuel - *Specific fuel used to run the heat supply (Geothermal, Biomass, RSU, Natural gas, Biogas,...)*

Case study (CS) parameters - *Please provide a description of the case study to be developed in the Act!OnHeat support facility*

Selected use cases (UCs) - *THERMOS UC to be carried out during the Act!OnHeat support facility*  
at least 1 choice(s)

- H&C network expansion
- New H&C network based on known energy supply
- New H&C network based on know energy demand
- Comparison with individual systems
- Supply model





## About Act!onHeat

Heating and cooling (H&C) accounts for about half of Europe's total energy needs with 75% still dependent on fossil fuels. Thus, rapid and significant change is needed to reach the EU 2050 goals. Due to the local nature of H&C systems, action has to be taken at local level involving a variety of stakeholders. This has been recognised in recent years and activities have been started like developing best practice policies and open source analysis tools. However, (efficient) H&C planning and project development are still not commonplace in most European municipalities.

**Act!onHeat will enable and accelerate local Heating & Cooling transitions by:**

- identifying success factors of effective energy plans, turning them into practical workflows;
- developing individual and group support activities to guide municipalities, local planners and stakeholder in applying these workflows;
- facilitating finance and the design of effective heat & cooling projects and policy frameworks

[www.actionheat.eu](http://www.actionheat.eu)

