
**Draft Project plan for the CEN
Workshop on "NESOI –
Standardized Approach for
the Management Optimization
of a Technical Assistance
Facility"**

**Requests to participate in the
Workshop and/or comments on the
project plan are to be submitted by
2024-06-28 to
sviluppo.progetti@uni.com ¹**

Recipients of this project plan are kindly requested to name all patent rights known to them to be relevant to the Workshop and to make available all supporting documents.

Milan, March 2024 (Version 1.0)

¹ Applications for participating in the Workshop and comments on the project plan that are not received by the deadline do not need to be taken into consideration. Once constituted, the Workshop will decide whether or not to consider the comments received in good time.

Contents

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Summary	6
1 Status of the project plan	6
2 Workshop proposer and Workshop participants	6
2.1 Workshop proposer	7
2.2 Other potential participants	7
2.3 Participants at the kick-off meeting	8
2.4 Registered Workshop participants	Error! Bookmark not defined.
3 Workshop objectives and scope	8
3.1 Background	8
3.2 Scope	8
3.3 Related activities	9
4 Workshop programme	9
4.1 General	9
4.2 Workshop schedule	10
4.3 Work already delivered	11
5 Resource planning	11
6 Workshop structure and rules of cooperation	11
6.1 Participation in the Workshop	11
6.2 Workshop responsibilities	12
6.3 Decision making process	12
7 Dissemination and participation strategy	13
8 Contacts	14

Summary

The technical assistance provided by the NESOI project has been instrumental in aiding islands to develop effective energy transition plans, conduct feasibility studies, initiate public tenders, and attract sustainable investments from both private and public sources. However, existing procedures for project selection and management of cascade funding initiatives lack standardization, leading to inconsistencies in project structures and funding management. To address this gap, a CEN Workshop Agreement (CWA) has been planned to establish standardized procedures for managing technical, financial, and legal support for energy transition projects under cascade funding. The aim is to leverage the experience gained from the NESOI project to develop replicable procedures applicable beyond island contexts. The CWA will define selection procedures, standard assistance menus and management protocols for cascade funding initiatives, intended for use by a broad spectrum of stakeholders including public institutions, donors, and international financial institutions at various levels of governance.

1 Status of the project plan

Draft project plan for public commenting (Version 1.0)

This draft project plan is intended to inform the public of a new Workshop. Any interested party can take part in this Workshop and/or comment on this draft project plan. Please send any requests to participate or comments by e-mail to sviluppo.progetti@uni.com.

All those who have applied for participation or have commented on the project plan by the deadline will be invited to the kick-off meeting of the Workshop on **10 July 2024**.

Approved project plan for CWA development adopted at the kick-off meeting of the Workshop on **10 July 2024**.

2 Workshop proposer and Workshop participants

The proposer of this CEN Workshop is the EU Island Facility NESOI project funded by Horizon2020 programme under Grant agreement n. 864266 and coordinated by:

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The CEN national member holding the Workshop secretariat is:

UNI - Ente italiano di Normazione
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2.1 Workshop proposer

Person or organisation	Short description and interest in the subject
SINLOC	<p>SINLOC is an impact company, participated by twelve Italian Banking Foundations, founded in 1981 and located in Italy. Over its 15 years of experience, SINLOC has gained an extensive track record in evaluating, structuring, and deploying infrastructural and local development strategies and solutions, including technical advisory in energy transition projects, urban infrastructures, social housing initiatives, welfare and healthcare. SINLOC operates both as an equity investor and as consultant, with a broad range of supplied services, in three main areas: Advisory, Equity Investment and Management/ Technical Advisory. As advisor, SINLOC supports strategic decisions of Local Administrations, Institutions, Banking Foundations and private companies, being oriented to the overall project sustainability. In addition, SINLOC operates as a Management Company and a Technical Advisor of investment vehicles and provides activities such as investment strategy definition, project scouting, investment structuring, financial closing and monitoring.</p>
R2M Solution	<p>R2M provides a wide range of services across the sectors of Energy, Sustainability, Certification, Real Estate and Innovation.</p> <p>R2M is a member of key international organizations and an important contributor to the development of new legislative standards mainly in the sustainability field (International Rating Systems LEED – WELL – BREEAM – GBC-HB – CAM and DNSH).</p> <p>R2M is a research and innovation company passionate about making the world a better place. We say yes to opportunity, strive to do right as an employer for our staff and their families, and we seek to develop, accelerate, and implement solutions to societal challenges. Half of our activities are in Research and Innovation – the realization of new knowledge, products, and services typically in the framework of collaborative European research. The other half of our activities focuses on the commercialization, early adoption and scaling of new products and services that disrupt markets, solve problems and make our clients more competitive. We operate mostly in the sustainability sector where we are deeply engaged in energy, buildings, construction and the smart grid. We proudly work in the Green Building Council and are distributors on our territories for some of Europe's most exciting tools and technologies.</p>
RINA Consulting	<p>RINA provides a wide range of services across the Energy, Marine, Certification, Real Estate and Infrastructure, Mobility and Industry sectors.</p> <p>With a turnover in 2022 of 630 million Euros, over 5,300 employees and 200 offices in 70 countries worldwide, RINA is a member of key international organizations and an important contributor to the development of new legislative standards.</p> <p>RINA Consulting is the engineering consulting company of RINA and has been involved in the NESOI project as leader of the Work Package focused on the definition and implementation of procedures for the selection of projects to be supported, as well as in the standardization of technical assistance menus and in the provision of assistance to the selected islands.</p>

2.2 Other potential participants

This CWA will be developed in a Workshop (temporary body) that is open to any interested party. The participation of other experts would be helpful and is desired. It is recommended that:

- Local, regional, national authorities
- Industry and commerce
- Academic and research bodies
- Financial institutions
- Sectoral associations
- Funded European Projects (i.e. Horizon 2020, Horizon Europe)

take part in the development of this CWA.

2.3 Participants at the kick-off meeting

The following persons or organisations already signed up to the kick-off meeting prior to the publication of the draft project plan.

Person	Organisation
Andrea Martinez, Workshop Chair	SINLOC
Mario Cortese, Workshop Vice-Chair	R2M Solution
Giorgio Bonvicini, Workshop Vice-Chair	RINA Consulting
Jaume Cot, Workshop Participant	ZABALA Innovation Consulting

3 Workshop objectives and scope

3.1 Background

The EU Island Facility NESOI (New Energy Solutions Optimised for Islands) was 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 started on October 1st, 2019, and finished on February 29th, 2024, and was made up of a multi-disciplinary consortium consisting of ten partners from seven EU Member States. It had a total budget of 10 million € of which approximately 3 million € were dedicated to a cascade funding mechanism to provide direct financial support for technical assistance to EU Islands.

Together with consortium capacity building activities, the Facility initially aimed at mobilising more than 100 million € of public/private 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 expected energy savings for 440 GWh/year and to avoided GHG emissions for 160,000 tCO₂e/y.

The two-round open call received 166 applications from 16 countries and selected 54 projects from 70 islands, potentially able to trigger 567 million € of public/private investments and to avoid 440,000 tCO₂e of GHG emissions. As a consequence, NESOI technical assistance has been crucial for islands to develop effective energy transition planning, feasibility studies, publish public tender, triggering sustainable investments, activating both private and public funds.

In the context of the NESOI project, procedures were developed for the selection of projects to be supported, for the standardization of technical/financial/legal assistance to energy transition projects and for the management of cascade funding initiatives. Currently, energy transition projects are not following a specific standard structure and cascade funding initiatives are managed in different ways according to the needs of the funding entity and of the involved stakeholders. The aim of the present CWA is to fill this standardization gap and, leveraging on the experience developed in the NESOI project, to standardize procedures to be replicated in other cascade funding initiatives on energy-related topics, not necessarily just islands.

3.2 Scope

The planned CEN Workshop Agreement defines procedures for the management of technical/financial/legal support to energy transition projects implemented through a cascade funding approach. This includes procedures

for the selection of projects to be supported, standardization of technical/financial/legal assistance menus for energy transition projects and procedures for the management of cascade funding initiatives.

The planned CEN Workshop Agreement is intended to be used by a wide range of stakeholders, including public institutions at local/regional/national/international level, as well as by Donors and International Financial Institutions for the management of the cascade funding initiatives they are implementing.

3.3 Related activities

The subject of the planned CWA is not at present the subject of a standard. However, there are committees, standards and/or other technical specifications that deal with related subjects and thus need to be taken into account – and addressed, where necessary – during this Workshop.

4 Workshop programme

4.1 General

The kick-off meeting is planned to take place on **10 July 2024** (online meeting). A draft for public commenting will be published for 30 days.

A total of maximum 10 Workshop meetings (kick-off meeting and Workshop meetings) and web conferences will be held, during which the content of the CWA will be presented, discussed and approved.

The CWA will be drawn up in English (language of meetings, minutes, etc.). The CWA will be written in English.

4.2 Workshop schedule

Table 1 shows the preliminary timescale and work programme of the workshop, which may be modified according to the progress of the project.

Table 1: Workshop schedule (preliminary)

CEN Workshop	FEB24	MAR24	APR24	MAY24	JUN24	JUL24	AUG24	SEP24	OCT24	NOV24	DEC24						
Initiation																	
1. Proposal form submission																	
2. Project plan development																	
3. Open commenting period on draft project plan (mandatory)																	
Operation																	
4. Kick-off meeting																	
5. CWA(s) development																	
6. Open commenting period on draft (optional)																	
7. CWA(s) finalised and approved by Workshop participants																	
Publication																	
8. CWA(s) publication																	
Dissemination (see 7)																	
Milestones				K		V		V	V			M	A			P	D

- K** Kick-off meeting
- M/V** Workshop meeting/Virtual Workshop meeting
- A** Adoption of CWA
- P** Publication of CWA
- D** Online distribution of CWA

4.3 Work already delivered under NESOI Project

The CWA will leverage and further exploit the work developed by NESOI Project. In particular, the following public deliverables represent the starting point for the workshop:

- D3.1 - Definition of eligibility pre-requisites (https://nesoi.eu/sites/default/files/documents/d3.1_definition_of_the_eligibility_pre-requisitesl_.pdf)
- D3.3 - Grid of selection criteria for the evaluation of projects (https://nesoi.eu/sites/default/files/documents/d3.3_grid_of_selection_criteria_for_the_evaluation_of_projects.pdf)
- D3.4 - Call for applicants – Round 1 (https://nesoi.eu/sites/default/files/documents/d3.4_nesoi_call_for_applicants_-_round_1_-_guidelines_for_applicants_.pdf)
- D3.6 - Call for applicants – Round 2 (https://nesoi.eu/sites/default/files/documents/nesoi_guidelines_for_applicants_2nd_open_call.pdf)
- D4.2 - Templates and documentation
- D4.5 - Monitoring report on on-site TA
- D5.1 - Sub-grant agreement model (https://nesoi.eu/sites/default/files/documents/d5.1_sub-grant_agreement_model.pdf)

5 Resource planning

The administrative costs of CEN Workshop Secretariat will be covered by resources from the H2020 project NESOI Grant Agreement No. 864266. The final document will include the following paragraph: "Results incorporated in this CEN Workshop Agreement have received funding from the European Union's Horizon 2020 research and innovation programme under Grant Agreement No. 864266".

Both registration and participation at the CEN Workshop described here are free of charge. The use of online meetings will be preferred. Nevertheless, in the case of physical meetings, they will be held in Europe and each participant has to bear his/her own costs for travel, accommodation and subsistence.

6 Workshop structure and rules of cooperation

The workshop will be led by a chair or vice-chair, while the project leader will support them in the organization.

The CEN Workshop Chair is responsible for ensuring that the development of the CWA follows the principles and content of the adopted project plan and the requirements of the CEN Guide 29. The CEN Workshop Chair may take decisions on the conduct of the CEN Workshop based on the comments expressed by the participants according to the CWA rules.

The workshop secretariat is responsible for the organization and management of the workshops according to the CEN Guide 29.

CEN Workshop participants draft the CWA and take in consideration the comments after the public commenting phase. CEN Workshop participants are the CWA proposers (the members of the NESOI project), plus other relevant stakeholders, identified by the proposer.

6.1 Participation in the Workshop

The Workshop will be constituted during the kick-off meeting. By approving this project plan, the interested parties declare their willingness to participate in the Workshop and will be formally named as Workshop participants, with the associated rights and duties. Participants at the kick-off meeting who do not approve the project plan are not given the status of Workshop participant and are thus excluded from further decisions made during the kick-off meeting and from any other decisions regarding the Workshop.

As a rule, the request to participate in the Workshop is closed once it is constituted. The current Workshop participants shall decide whether any additional members will be accepted or not.

Decisions on any new participant in the Workshop at a later date are made by participants making up the Workshop at that time. It is particularly important to consider these aspects:

- a. expansion would be conducive to shortening the duration of the Workshop or to avoiding or averting an impending delay in the planned duration of the Workshop;
- b. the expansion would not result in the Workshop taking longer to complete;
- c. the new Workshop participant would not address any new or complementary issues beyond the scope defined and approved in the project plan;
- d. the new Workshop participant would bring complementary expertise into the Workshop in order to incorporate the latest scientific findings and state-of-the-art knowledge;
- e. the new Workshop participant would actively participate in the drafting of the manuscript by submitting concrete, not abstract, proposals and contributions;
- f. the new Workshop participant would ensure wider application of the CWA.

All Workshop participants who voted for the publication of the CWA or its draft will be named as authors in the European Foreword, including the organisations which they represent. All Workshop participants who voted against the publication of the CWA, or who have abstained, will not be named in the European Foreword.

6.2 Workshop responsibilities

The Workshop Chair is responsible for content management and any decision-making and voting procedures. The Workshop Chair is supported by the Workshop Vice-Chair and the responsible Workshop secretariat, whereby the Workshop secretariat will always remain neutral regarding the content of the CWA(s). Furthermore, the Workshop secretariat shall ensure that CEN-CENELEC's rules of procedure, rules of presentation, and the principles governing the publication of CWA(s) have been observed. Should a Workshop Chair no longer be able to carry out her/his duties, the Workshop secretariat shall initiate the election of a new Workshop Chair. The list below covers the main tasks of the Workshop Chair. It is not intended to be exhaustive.

- Content related contact point for the Workshop
- Presides at Workshop meetings
- Ensures that the development of the CWA respects the principles and content of the adopted project plan
- Manages the consensus building process, decides when the Workshop participants have reached agreement on the final CWA, on the basis of the comments received
- Ensures due information exchange with the Workshop secretariat
- Represents the Workshop and its results to exterior

The Workshop secretariat, provided by a CEN national member, is responsible for organising and leading the kick-off meeting, in consultation with the Workshop proposer. Further Workshop meetings and/or web conferences shall be organised by the Workshop secretariat in consultation with the Workshop Chair. The list below covers the main tasks of the Workshop secretariat. It is not intended to be exhaustive.

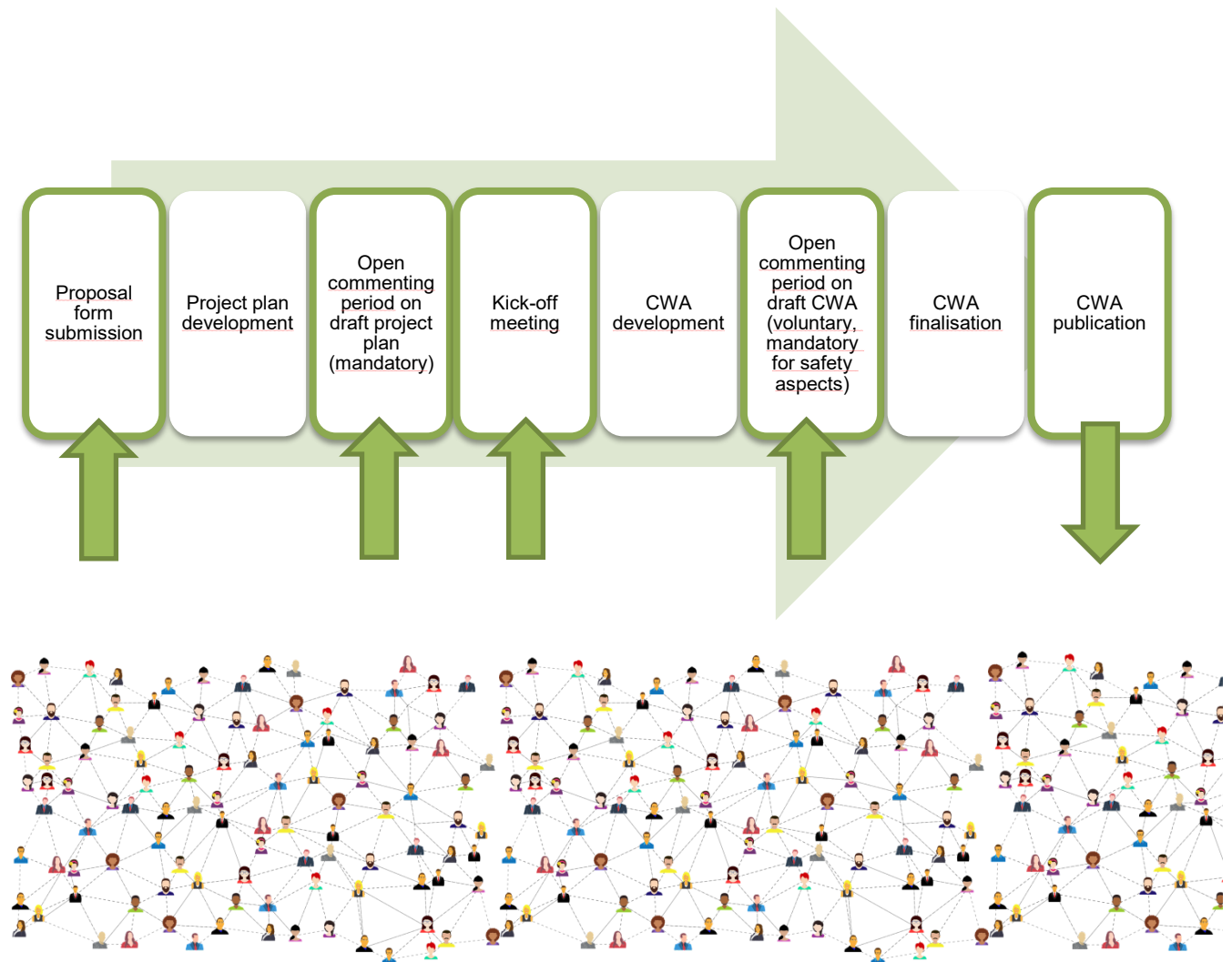
- Administrative and organisational contact point for the Workshop
- Ensures that the development of the CWA respects the principles and content of the adopted project plan and of the requirements of the CEN-CENELEC Guide 29
- Formally registers Workshop participants and maintains record of participating organisations and individuals
- Offers infrastructure and manages documents and their distribution through an electronic platform
- Prepares agenda and distributes information on meetings and meeting minutes as well as follow-up actions of the Workshop
- Initiates and manages CWA approval processes upon decision by the Workshop Chair
- Interface with CEN-CENELEC Management Centre (CCMC) and Workshop Chair regarding strategic directions, problems arising, and external relationships
- Advises on CEN-CENELEC rules and brings any major problems encountered (if any) in the development of the CWA to the attention of CEN-CENELEC Management Centre (CCMC)
- Administrates the connection with relevant CEN or CENELEC/TCs

6.3 Decision making process

Each Workshop participant is entitled to vote and has one vote. If an organisation sends several experts to the Workshop, that organisation has only one vote, regardless of how many Workshop participants it sends. Transferring voting rights to other Workshop participants is not permitted. During voting procedures, decisions are passed by simple majority; abstentions do not count.

If Workshop participants cannot be present in the meetings when the CWA or its draft is adopted, an alternative means of including them in the voting procedure shall be used.

7 Dissemination and participation strategy



Proposal form submission

The Workshop proposal will be disseminated to the following relevant stakeholders and bodies for consultation:

- Relevant standards committees, working groups etc.
- Governments and authorities
- Sector forum
- Focus groups on relevant activities
- Coordination groups on relevant activities
- NESOI sister projects

Open commenting period on draft project plan

The project plan will be disseminated to the following relevant stakeholders and bodies for commenting:

- Relevant standards committees, working groups etc.
- Governments and authorities
- Sector forum
- Focus groups on relevant activities
- Coordination groups on relevant activities
- NESOI sister projects

In addition to the CCMC website, the project plan and the date of the kick-off meeting will be advertised on the UNI website and the [NESOI website](#), and social networks to raise awareness. Interested parties are requested to contribute either through commenting of the project plan (short term) or through Workshop participation (long term).

Open commenting period on draft CWA

The open commenting period is optional and will be agreed at a later stage by Workshop participants according to the CEN Guide 29. In case the draft CWA is submitted to the public commenting period, it will be disseminated to the following relevant stakeholders and bodies for commenting:

- Relevant standards committees, working groups etc.
- Governments and authorities
- Sector forum
- Focus groups on relevant activities
- Coordination groups on relevant activities
- NESOI sister projects

In addition to the CCMC website, the project plan and the date of the kick-off meeting will be advertised on the UNI website and the [NESOI website](#), and social networks to raise awareness. Interested parties are requested to contribute through commenting of the draft CWA (short term).

CWA publication

The final CWA will be disseminated to the following relevant stakeholders and bodies:

- Relevant standards committees, working groups etc.
- Governments and authorities
- Sector forum
- Focus groups on relevant activities
- Coordination groups on relevant activities
- NESOI sister projects

In addition to the CCMC website, the final CWA will be advertised on:

- Sector specific newsletter
- Social media, such as
 - Facebook
 - Instagram
 - LinkedIn
 - X
- Research Gate
- EC Newsroom

8 Contacts

- Workshop Chair and Proposer:
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