



SMAFIN Methodology

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The Report at a Glance

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Responsible Author(s)	Stanislav Andreev, EnEffect Consult	e-mail	sandreev@eneffect.bg
Contributors	All partners		
Reviewers	Kiki Papadopoulou (CRES)		
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1 INTRODUCTION

1.1 SMAFIN Project

The Horizon 2020 SMAFIN project aims to establish national dialogues on energy efficiency investment topics through 12 national roundtables in Bulgaria, Croatia, Greece, and Romania, building on top of the Sustainable Energy Investment Forums (SEIF). By bringing together stakeholders from government, financial, enterprise, and academic sectors, the project supports EU policy regulations and initiatives such as the Green Deal, Renovation Wave strategy, and New European Bauhaus. Since its inception in 2020, SMAFIN has organized annual roundtable discussions in each participating country, focusing on energy efficiency investments in private and public buildings, infrastructure, industry, and SMEs.

The project created permanent discussion forums and engaged stakeholders to work together and develop strategies, action plans, and recommendations for improving national policy frameworks to support the upscaling of existing best practices at national and European level. Additionally, SMAFIN established effective collaboration and connections between stakeholders, while also identifying synergies with other energy-oriented projects at EU and national levels and further developed energy policy measures focusing on creation of new market initiatives.

1.2 Purpose of the document

Moving towards more sustainable financing of energy efficiency projects is a long process in which productive dialogue between stakeholders is essential. Thanks to the Sustainable Energy Investment Forums (SEIF), this dialogue in the EU started in 2017 and has subsequently been extended by various projects such as [SMAFIN](#), [BeSMART](#), [RoundBaltic](#) and others, funded under Horizon 2020 program. The purpose of this document is to support the continuation of the initiated dialogue, providing guidelines for the successors of the initiative based on the lessons learned during the last years. The guidelines below will facilitate any organisation with the motivation and resources to continue organising roundtables on financing energy efficiency and develop policy recommendations for a more sustainable and smarter use of resources to achieve the EU's energy and climate goals. The document includes not only practical guidelines on how to organise the roundtables, but also how to make the initiative sustainable by involving all stakeholders and disseminating the results. Thus, it is important that the next roundtables facilitator can ensure sustainability of the initiative.

Additional useful information and examples can also be found on the website the [SMAFIN](#) projects.

2 SUSTAINABILITY AND REPLICATION

Practice shows that the initiative to organise an ongoing dialogue on the sustainable financing of energy efficiency projects should not be a campaign but a continuous process involving different stakeholder groups. This is why the organisation committed to continue the roundtables should take due care to ensure the sustainability of the events in the medium and long term, by developing a clear vision for several years ahead. It is assumed that a cycle of roundtables should last three years, as sufficient time and at least a few roundtables are needed to shape detailed policy recommendations. Furthermore, after the end of the period, the baseline (see section 3.3) should be analysed again in the light of changes in national and European legislation, the role of stakeholders, and the new financial instruments.

How the results of the initiative will reach the maximum number of stakeholders is also essential, which means identifying the most effective channels of communication at national level (national and specialised media, social networks, communication channels of financial and public institutions).

The possibility of setting up a national discussion platform to upload information on the discussions held, the conclusions generated, and the recommendations made should not be overlooked. However, it should be borne in mind that this is a time-consuming process and realistically such a platform would only be effective if it is kept up-to-date with relevant and interesting information for stakeholders and promoted continuously. It should involve national and local authorities as well as specialised financial institutions, commercial banks and the NGO sector. The platform should discuss hot topics, current and future financial instruments and the active participation of the main market players should be a prerequisite for policy makers and financial institutions to take into account the needs of the market and the views of experts.

To be functional and for the benefit of users, the platform can be the place where stakeholders can:

- hold public consultations on future programmes and initiatives,
- inform themselves about funding opportunities available for their project,
- share good practices from successfully implemented projects,
- coordinate their intentions to realise partnerships between project owners and aggregate investments,
- establish a link between investors, financial institutions, and project owners.

This, of course, can only happen if national and local authorities, as well as financial institutions and private business, are involved in the process.

More information and specific recommendations are available in section 3.2 below.

3 METHODOLOGY

In this section, an indicative step-by-step guide for organisation of the roundtables is included. It is assumed that a cycle of RTs will last for a period of 3 years and the preparation of the next cycle should start in the last months of the proposed period.

3.1 Establishment of Steering Committee

The establishment of a Steering Committee (SC) and its effective work is key to achieving the set objectives. It is recommended that the SC should include representatives of selected key stakeholders, in the best case nationally recognised experts, often with different profiles and knowledge (finance, law and procurement, energy efficiency and renewables, communication), who will be responsible for the effective implementation of the initiative. Ideally, members should be representatives of related ministries; local authorities; academia; business, financial sector, NGOs, and even the media.

Given that the aim is to involve experts at the highest level, the SC meetings cannot be expected to be more frequent than once a year, and it is essential that they are organised in such a way as to avoid bureaucratic management practices. Certainly, the first meeting should present the initiative in detail and its main objective to clarify the vision for creating sustainable financing models for energy efficiency and renewable energy projects. However, subsequent meetings should focus on the practical part of the initiative. Therefore, in these meetings, the person in charge of the roundtables should share synthesized information on

the main obstacles he/she encounters not only in running the events but also in engaging the interest of stakeholders.

The role of the SC should not be confused with the organisation of working groups and thematic workshops (see section 3.4), although some of the experts may be involved in both. The main purpose of the SC is to discuss how to improve the effectiveness of the initiative, who should be involved in the working groups and the thematic workshops, which stakeholder groups should be given particular attention, what format is best for the events, how to transfer the information to a wider range of stakeholders, in what form the outcomes of the roundtables should be communicated, how to identify the main topics for discussion. The organisation of the SC meetings should start at least one month before. It is a responsibility of the organiser to present a well-managed agenda in respect of the time of the participants.

Another responsibility of the SC will be the periodic monitoring and evaluation of the results achieved in order to create a more effective dialogue with all stakeholders. This should be done on the basis of an analysis of the results of the roundtables, such as the number and type of attendees, feedback from participants, and media coverage of the events.

3.2 Development/maintenance of the communication platform

The experience from the SMAFIN project shows that an international platform where stakeholders from different countries share experience, although successful during project lifetime, is hard to manage and less useful than a country specific forum or webpage where the experts can communicate in local language (a link to the SEIF webpage and, if agreed with the EC, a link back to the national initiative may be helpful). This will allow the uploading of the national legislative framework, strategic documents related to energy efficiency and RES, as well as published analyses, recommendations and stakeholder opinions. It is also recommended to add sections dedicated to project owners and financial institutions, where the former will be able to share information on interesting and innovative projects seeking financing, and the latter will be able to share specific financial products dedicated to sustainable project financing.

For the wider dissemination of the initiative, it is recommended to continuously promote the platform through appropriate links on the websites of the main stakeholders, as well as through the social media profiles of these parties (see section 3.7). It is crucial that the information on the platform is updated in a timely manner, and in addition to the above, the analyses made to identify the baseline, the results of the working group meetings, information on the dates and content of future roundtables, the main conclusions of the roundtables should be available there. The platform can also serve as a tool to attract participants to the thematic workshops to be organised, which will aim at enhancing the capacity of all stakeholders.

Sample platform content can be:

- Information about the baseline,
- EU and national strategic documents,
- Current financial instruments in the country,
- Good practices from other countries and initiatives,
- Agendas, proceedings, and presentations from the roundtables,
- Outcomes from the workshops,
- Policy recommendations,
- Section for financial institutions to promote their products on sustainable energy financing,
- Section for project owners who are looking for financing.

3.3 Identification of the baseline and stakeholders mapping

This is the first essential step that the organisation needs to take before starting the actual work of establishing the roundtables. It is crucial to allocate sufficient time resources for this task. The main objective here is to identify the barriers and challenges to effective implementation of energy efficiency policies and the realisation of sustainable investments (see template). The analysis should also include the existing investment framework and regulation at EU and national level, financial models, findings and results of similar initiatives such as Sustainable Energy Investment Forums.

In addition, current good and bad practices for sustainable financing of energy efficiency and renewable energy projects should be analysed here to serve as a basis for future improvements to be identified during the working group meetings (see section 3.4) and discussed in detail during the roundtables (see section 3.5).

Given that such analyses are already available, it is appropriate to build on their findings by analysing their credibility and updating the conclusions and recommendations on the basis of developments over the last years.

The analysis should focus at least on the following (for more information see the respective deliverables on the [SMAFIN website](#)):

- Evaluation of previous initiatives (SEIF I and II, previous H2020 projects like SMAFIN and BeSMART), including general information; overview and main findings; results.
- Assessment of the available financial instruments (based on desk research and interviews with the relevant stakeholders), including market context overview; financial schemes; supportive materials and tools; market assessment.
- Review of existing good practices (national and at EU level).
- Review of national policies and initiatives, including overview of national legislation and the progress towards the implementation of the EED and EPBD; analysis of the national programmes and initiatives, suggestions for improvement.

In parallel with the above-mentioned activities, prior the formation of the working groups (section 3.4) and the establishment of the roundtables (section 3.5), a detailed stakeholder mapping is also required. This process usually includes the following steps:

1. Identification - listing relevant groups, organisations and individuals that are or could be relevant to the topic of sustainable financing of energy efficiency and renewable energy projects.
2. Analysis - categorizing the stakeholders by type:
 - National authorities,
 - Local/regional authorities,
 - Financing institutions,
 - Construction sector,
 - Industry and SMEs,
 - Homeowners' associations,
 - Energy consultants and professionals,
 - Energy services providers,
 - Municipal networks,
 - Research institutions, EU and national projects,
 - Green/environmental organisations, NGOs,
 - The media,

based on their expertise, involvement, value for the initiative, and level of interest in the topic.

3. Visualisation - for better understanding of the stakeholders' relations to the objectives of the initiative and between each other the information from the previous two steps should be visualised based on the parameters mentioned above.
4. Prioritization - ranking the identified stakeholders based on their role, involvement and interest is critical to properly and effectively targeting and engaging each segment, as well as defining their roles (WG members, potential panellists and speakers, RT participants) and their attitudes (supportive, neutral and opposed).

If there have already been such initiatives in the country, the organization concerned can contact the previous organizers for advice and even include their experts in the working groups and the steering committee.

3.4 Formation of working groups /organisation of thematic workshops

Achieving sustainable financing for energy efficiency and renewable energy projects is a multi-disciplinary task that requires experts with diverse expertise to tackle successfully. Rarely are such specialists spread across a single organisation. This is why the involvement of independent and high qualified experts in at least the following fields is crucial for the successful implementation of the initiative and for the final results: finance, energy efficiency, renewables, policy, law, procurement and even communication. Their role in organising the roundtables and making concrete policy recommendations is essential and should be seen as leading in the whole process.

The formation of the working group should be based on the stakeholder analysis (see section 3.3), identifying the appropriate experts to contact. Typically, these are highly skilled professionals who are highly committed and the approach to bringing them into the working group should be based on clear demands on their time and effort. The WG may consist of 8 to 15 members.

The WG meetings should be organised about 2 months before the roundtable with the aim to set the content for the event based on specific issues concerning sustainable financing of energy efficiency. These issues must be identified within the national strategic documents and policies, financial instruments and programs, market behaviour, and last but not least the correspondence of the national regulations with the requirements of the EU directives.

Potential panellists and speakers should also be identified at these meetings and invited to participate in the roundtable. The identification of stakeholders (Section 3.3) may serve as a basis for this discussion.

During the implementation of the SMAFIN project, working groups were also organised after the roundtables to analyse the results and refine the event factsheets. Given that many of the working group members actively participate in the roundtables, there is a risk that the discussions in these working groups are more or less repetition of the same opinions by the same people. That is why in this methodology package it is proposed, as an alternative, to organise thematic workshops (TW) 1 or 2 months after the roundtables, to which, in addition to some of the members of the working group, other experts with more specialised knowledge and expertise in a particular field should be invited. In this way, based on the outcomes of the respective roundtable in a more fractured format, it will be possible to comment on the relevant topics, the necessary reforms and the awakening of the market through more sustainable financing instruments. For greater efficiency, it is advisable to hold the events in person or hybrid format, with a range of 15-25 participants. The organizer is responsible for preparing minutes of the meetings, to be send to all members for approval.

The TW are expected to improve dialogue and cooperation through involvement of external experts in the discussion. Furthermore, in such format the events will support another objective of the initiative - to build upon the capacity of the participants as they will be required to contribute their thoughts, ideas, and perspectives during group discussions, brainstorming sessions, or exercises.

The organization responsible for the establishment of the roundtables will need to prepare specific agendas, defined timelines, and predetermined outcomes, ensuring that the time spent is focused and results oriented.

The outcomes of the TW should be communicated with the appropriate stakeholders and also will serve as a base for the discussions of the WG before each RT.

3.5 Establishment of the national roundtables

For the successful organisation of the roundtables, the organisers need to be aware of their main objective, namely, to improve dialogue and cooperation between all stakeholders in order to build and improve policies and initiatives for sustainable financing of energy efficiency projects. Prior to the start of each triennial cycle, a review of previous ones should be made (see section 3.3), if already organised in the country concerned, and strengths and weaknesses analysed. Each cycle ends with specific policy recommendations and proposals for new and/or improvements to existing financial models.

In general, the following phases are needed for the organisation of each roundtable:

3.5.1 Content

The topics to be discussed during the roundtable should be initially based on the detailed identification of the baseline. This is also the role of the preliminary meeting of the working group (see section 3.4), during which the experts involved will formulate the topics in a way that will attract the attention of as wide a range of stakeholders as possible. The topics should be selected to aim at a productive discussion on removing barriers to sustainable project financing. Review of the previous RT topics and the reports of the [EEFIG working groups](#) may be useful in this process.

Based on the above, keynote speakers, panellists and lecturers should be invited. Suggestions for specific individuals will be made within the working group meeting, with the aim that they will be prominent opinion leaders, and a balance should be sought between public institutions, private sector, funding institutions, academia, and NGOs depending on interest and degree of influence in relation to specific topics. All WG members should be involved in the process of attracting the key participants.

3.5.2 Structure and format

The practice of having an opening plenary session to set the tone for the discussion has proved successful, but it is then up to the organisers to propose an optimal option for the continuation of the event, balancing between organising 2 or 3 parallel sessions (20 - 30 participants per session) or a more targeted sequential sessions on specific topics that are relevant at the particular moment. Such decisions should be discussed within the WG based on the profiles of the interested stakeholders and the importance of the topics.

At this stage, the agenda will need to be agreed with the working group, with the lead organisation responsible for developing it and circulating it to members to get feedback. It is highly recommended that the agenda be complemented with a background note (1 to 3 pages) describing the objectives of the event, the format, the discussion topics, the main issues to be addressed and the type of audience expected.

As soon as the agenda and the background note are sent to the stakeholders, the registration form should be opened, preferably 1 month prior to event. Registration forms should be reviewed at least weekly and in the event of unsatisfactory levels, a more proactive campaign (see Promotion below) should be undertaken by increasing the number of social media posts, sending emails and even phone calls to some of the key stakeholders.

3.5.3 Organisation and logistic

Since the end of the COVID19 pandemic, during which almost all events were held online or hybrid, it has become increasingly difficult to organise a large-scale event with a physical presence. Many speakers and stakeholders prefer to engage online, which saves them time and travel costs, but proves less productive, despite the possibility of using platforms such as MIRO. The main thing that is lost is networking during breaks and the opportunity for different stakeholders to see each other and comment on possible collaborations face-to-face. Organizers should therefore do everything possible to arouse the interest of the audience and attract as many participants as possible to physically participate on site. To this end, a convenient venue should be chosen, suitable topics identified, interesting speakers invited, and it should be specified that even if the event is streamed online, the on-site participants will have the opportunity to actively participate in the discussions, while the others will only be listeners.

3.5.4 Promotion

This stage should build on the communication strategy already developed (see section 3.8), where communication techniques and tools are selected and specific approaches and channels are identified for different stakeholder groups. Key here is the involvement of the media in the process, as the main ones have already been identified (see section 3.3) and preliminary discussions have been held with them. At least one week before the event press releases with information about the upcoming roundtable (key speakers, goals, venue, agenda) should be published. In this case, too, the members of the working group can be relied upon, using their contacts to get more coverage of the event on social networks, the media and other possible communication channels.

3.5.5 Evaluation

After each roundtable, an evaluation of the event should be made, addressing at least the following:

- number of participants (in person and online) by type,
- media coverage and articles,
- number of citations in the professional and national media,
- web statistics - visits to the communication platform,
- social media - number of expressions and engagements,
- analysis of feedback and direct suggestions.

In addition, feedback from the participants should be gathered using various approaches but with respect to their time and efforts:

- interviews with randomly selected guests and speakers,
- online surveys,
- real-time feedback during the sessions.

The information will then be presented to the WG before the next roundtable to discuss possible improvements for the next event in terms of content, format, venue, etc.

1. Outcomes

For the successful and effective dissemination of the results of the roundtables (see section 3.8), they should be presented in easy-to-read and concise reports describing the main outcomes of the event. These outcomes should be available to all stakeholders and disseminated in accordance with the developed communication plan using the most suitable channels.

The reports must include at least the following (examples can be found on [SMAFIN](#) project website):

- Highlights (number of sessions, number of stakeholders, discussed topics),
- Key takeaways (quotes from the key participants),
- Conclusions (main conclusions and recommendations generated during the sessions and from the event in general).

The above report should be agreed with the WG members, preferably by email, to save both the experts' time and the time of organising a separate meeting. The main conclusions of the document should be used to identify the content of the technical workshops that are organised after each roundtable.

3.6 Policy recommendations

This is the main outcome of the initiative, which is based on the findings and the conclusions of the three-year cycle of roundtables, WG meetings and TWs, aiming to ensure common understanding of the identified issues in the existing policy and financial framework. The document should contain concrete policy recommendations and proposals for new financial models and will be used to support the policymakers for the timely and effective implementation of the National energy and climate plans. It should be widely promoted and in the best case used by the policymakers to update the national strategic documents, the legislation, and the existing financial schemes. The recommendations should directly target the identified issues in sustainable financing of energy efficiency in the country in based on the analyses of all sectors, namely public and private buildings, SMEs, industry and infrastructure.

The document should be presented in detail during a final conference at the end of the three-year cycle.

Examples from previous initiatives can be found on the project [website](#).

A sample structure of the recommendations is presented hereafter:

Policy recommendation 1: ... (short name)

Core problem	<i>A brief synopsis of the core problem that the country wants to resolve, referencing the results of the RTs and WG conclusions. The importance of the issue should be explained, as well as the consequences of the lack of adequate measures.</i>
Barriers to be solved	<i>A brief description of the main barriers and/or challenge facing the field of energy efficiency in the national context.</i>
Objectives and purpose of the recommendation	<i>The main goals and purpose of the national recommendations should be stated here. What specific goals do we want to achieve through these recommendations? What is the final result we want to achieve?</i>
Policy recommendation	<i>In this category, specific policy measures that are proposed to solve the identified problems and achieve the proposed policy recommendations should be listed. The description should include the implementation process, timeline, cooperation needs, financial aspects, and resources needed to implement the recommendations.</i>
Stakeholder involvement	<i>Explain how stakeholders, including relevant government agencies, private sector entities, financial institutions, and civil society organizations, were involved in the development of the recommendations. Describe the consultation process, workshops, and feedback mechanisms employed to ensure broad stakeholder participation.</i>
Monitoring and evaluation	<i>Outline the proposed mechanisms for monitoring and evaluating the implementation of the policy recommendations. Describe the indicators and metrics that will be used to measure progress and success, as well as the frequency and methods of reporting.</i>
Alignment with national energy and climate plans (NECP)	<i>Explain how the policy recommendations align with the goals, targets, and priorities outlined in the national energy and climate plans. Emphasize the contribution of the recommendations towards achieving the country's NECP objectives.</i>

<p>International best practices and benchmarks</p>	<p><i>Reference relevant international best practices and benchmarks that informed the development of the policy recommendations. Highlight successful case studies and experiences from other countries that can serve as models for implementation.</i></p>
<p>Financing mechanisms</p>	<p><i>Provide insights into the proposed financing mechanisms and financial instruments that can support the implementation of the policy recommendations. Discuss potential sources of funding, such as national budgets, international funds, public-private partnerships, and incentives for private sector investment.</i></p>
<p>Capacity building and knowledge sharing</p>	<p><i>Describe the proposed capacity-building activities and knowledge-sharing initiatives to enhance the country's capabilities in implementing the policy recommendations. Outline training programs, workshops, and knowledge exchange platforms that will facilitate the transfer of expertise and best practices.</i></p>
<p>Risks and challenges</p>	<p><i>Identify potential risks and challenges that may hinder the successful implementation of the policy recommendations. Discuss strategies to mitigate these risks and address the challenges effectively.</i></p>

3.7 Communication and dissemination

Paving the way for much-needed reforms to accelerate the uptake of sustainable energy efficiency financing in a transparent and collective way requires the active participation of all stakeholders. Therefore, the organisation that takes over the initiative and continue to organise the roundtables must have a clear vision of how the information and results will be disseminated to the widest possible range of people. This section of the document provides concrete guidance on how to develop a communication strategy with a vision for the whole 3-year cycle.

As a first step in this endeavour, the team should understand the context of the task, which can be done for example through a PEEST analyses. This will provide a structured framework to evaluate and respond effectively to the external factors that may impact the success of the initiative. The goal is to:

- gain a comprehensive understanding of the external factors that may have an impact on the results,
- identify potential risks and challenges by examining the political, economic, environmental, social, and technological factors,
- understand the market trends and stakeholders behavior,
- formulate the strategy by highlighting the opportunities and treats presented by the external factors.

Based on the above, the goals and objectives of the communication strategy should be defined. The document should clearly identify general objectives, such as:

- maximize the visibility and the influence of the initiative,
- engage stakeholders effectively through supportive communication tools,
- disseminate broadly the goals and the results,
- market uptake of the initiative even after the 3-year cycle,

and measurable specific goals, such as:

- number of roundtables (1 per year),
- number of participants from the different stakeholder groups,
- number of media publications,
- number of expressions of attitude,
- number of satellite events,
- etc.

The communication strategy should also elaborate the means for reaching the target groups with the most appropriate and efficient way, based on the stakeholder mapping (see section 3.3.). The documents should include key messages aimed at the different profiles of the stakeholders that can in general split into three main categories, namely: policy makers, business-oriented actors, and end users. The targets toward each stakeholders' group and the preferred communication channels for each of them should be outlined considering also the awareness level of each group. Particular attention should be paid to financing institutions, recognising their key role in generating appropriate financial instruments aimed at the sustainable financing of energy efficiency projects. The second equally important group is that of policy makers who should undertake appropriate reforms to support such instruments. As already mentioned, the initiative should, on the one hand, initiate and, on

the other, facilitate dialogue between these and all other groups in order to increase the share of private financing in energy efficiency projects.

An essential element of the communication strategy is the engagement plan. It should focus on how to effectively engage stakeholders in order to create constructive dialogue and encourage their interaction. The plan should outline the tactics and activities that will be used in the engagement process, such as social media interactions, participation in satellite/external events, surveys, feedback mechanisms and other possible forms of direct interaction. The objective of the plan is to maximize the impact of the initiative and increase the participation rate. Special attention should be given to the final event that will close the cycle of RTs with presentation of the generated outcomes - the policy recommendations (see section 3.6).

One of the main communication tools should be the developed platform (see section 3.2), where the organisers will upload all outcomes of the initiative as well as useful information for all stakeholders (e.g. strategy documents, legislative framework, analysis and recommendations, supporting tools, existing and upcoming funding programmes, good practices).

Visual identity should also be part of the strategy, as it will give a consistent look of all communication outputs. This section of the document should focus at least on logo, outputs templates (agendas, proceedings, presentations, etc.), color palette, typography, and flyers.

Monitoring and evaluation of the results is required to assess whether the selected communication channels are effective and the target outcomes will be achieved. The communication strategy should be handled as an evolving document throughout the 3-years cycle, coordinating and integrating the communication and dissemination effort carried out by the roundtables implementor.

The roles and responsibilities of the involved experts should be clarified in the document.

3.8 Indicative time schedule

This section of the document shows an indicative timetable for the initiative, assuming, as written above, that a cycle lasts 3 years.

The initially developed timetable may be adapted in the process for various reasons, such as local and national elections (events should be apolitical and no electioneering should be allowed), significant changes in legislation (the roundtable can be a venue for public discussion of proposed changes or a venue to explain changes already made), announcement of new funding schemes (promotion of new, more sustainable instruments by financial institutions), etc.

Activity\Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36			
Establishment of Steering Committee and meetings	Establ. and 1 st mtg											2 nd mtg												3 rd mtg													Fin. mtg		
Development/maintenance of communication platform	Based on the identified baseline and the targeted stakeholders																																						
Identification of the baseline	Barriers, needs, stakeholders, communication channels																		Revise the baseline																			Update of the baseline	
Working groups and thematical workshops							WG						TW							WG																			TW
Establishment of national											1 st RT													2 nd RT													3 rd RT		
Dissemination of the results	Communication plan and initial promotion of the RTs	Promoting 1 st RT					Dissemination of the 1 st RT outcomes					Promoting 2 nd RT					Dissemination of the 2 nd RT outcomes					Promoting 3 rd RT and draft of policy recommendations					Final pol. rec.												

4 LESSONS LEARNED DURING SMAFIN

This chapter summarizes some specific issues that the project partners encountered during the organisation of the roundtables and the approaches to address them. These issues could be due to various factors that should be assessed by the organisers, both during the implementation of the initiative and during the identification of the baseline (see chapter 3.5).

4.1 Bulgaria

During the project it was necessary to take into account the following specificities that the team encountered locally:

- The lack of a permanent government and the holding of national elections, sometimes twice a year, which led to delays in policy reforms for sustainable financing of energy efficiency projects and difficulties in engaging the relevant ministries to participate in the roundtables organized.

Such an issue can be tackled by very active communication that makes the initiative visible, and by engaging all members of the working group in stakeholder engagement, by sharing the latest information and news during the plenary session and generating interesting and relevant topics for discussion during the parallel sessions.

- Holding a significantly larger number of roundtables (4 per year) due to the parallel running of the sister project BeSMART, which had identical objectives and duplicated many of the tasks of SMAFIN (holding roundtables, working group meetings, etc.). This resulted in a significantly greater effort by the team to engage highly qualified panellists and involve stakeholders at each of the events.

Again, such issue can be tackled only through careful selection of the information shared (e.g., announcing expected reforms and new project funding program and initiatives), and through useful and fruitful discussions focused on specific issues and solutions for financing energy efficiency at local level, including practical guidance for all type of stakeholders.

4.2 Croatia

Several contextual factors shaped the implementation of SMAFIN roundtables and policy recommendations in Croatia. In 2020, two major earthquakes struck near Zagreb, causing extensive damage to buildings and critical infrastructure (The total damage of Petrinja earthquake was estimated by World Bank consultants in cooperation with the Ministry of Construction and the Ministry of Regional Development and EU Funds, and is estimated at 5 billion euros and may eventually increase to 5.5 billion euros.). This exacerbated pressing needs to improve the energy efficiency and resilience of Croatia's building stock. The earthquakes also disrupted economic activity and government operations, overlapping with the COVID-19 pandemic.

These crises underscored the importance of streamlining investment procedures and utilizing innovative financing schemes to support reconstruction and renovation. The SMAFIN roundtable discussions emphasized earthquake reconstruction and enhancing capacities of public authorities to implement renovation projects, including via public-private partnerships. Stakeholders called for aggregated approaches to rebuild damaged buildings at higher efficiency standards.

SMAFIN discussions emphasized the need to build capacity in public authorities to implement renovation projects using advanced models like EPC and PPPs. Participants called for establishing a national One Stop Shop (OSS) system to provide integrated advisory services and simplify access to renovation financing for local governments.

The establishment of a national One Stop Shop (OSS) was recommended to provide integrated advisory services and simplify access to renovation financing, particularly for local authorities managing public facilities. OSS could assist rebuilding efforts by advising on technologies, contractor selection, and funding sources. Participants also highlighted the need for preferential loans, on-bill financing, and dedicated schemes to support low-income households in undertaking renovations.

- Additionally, Croatia's relatively small size means there is a limited pool of experts and stakeholders engaged on energy efficiency and climate policy. This required additional effort by SMAFIN partners to identify qualified speakers and generate interest for each roundtable event.

The team mitigated stakeholder fatigue by carefully selecting timely discussion topics tied to new policy developments, funding opportunities, and practical solutions. For example, organising events with major stakeholders such as Croatian National Bank and European Investment Bank helped attract targeted participation, especially from the financial sector.

Careful outreach and meaningful, solutions-oriented discussions centered on Croatia's specific needs proved effective in generating continuous participation across the multiple SMAFIN roundtables. This approach can serve as a model for ensuring productive stakeholder engagement within a small expert community on an ongoing basis.

4.3 Greece

During the project, it was necessary to take into account the following specificities that the national team encountered in Greece:

- The SMAFIN implementation period in Greece as in the other partner countries, coincided almost entirely with the COVID period. The initial planning for the project had to be reconsidered mainly in terms of the means for the organization of events and meetings. The well-experienced national team turned to online project meetings, working group meetings and roundtables for the first year. The following 2 years, online or combined online and physical events had been organized. Further to the restrictions that have been raised from the pandemic, the consortium had to also face the lack of interest for other topics than the pandemic itself, which was the first priority for the majority of the audience at that time.

Although the situation caused by COVID 19 was not a national issue, was a serious obstacle that was overcome thanks to the experienced institutions involved and previous established collaborations with the main national stakeholders. Online tools have been used for the organization of meetings and events. Partnerships with other projects and initiatives have been sought while various communication tools have been used to trigger interest on the social media and the platform.

- In order the project to provide concrete results and contribute substantially to the national energy policy planning, the team had to coordinate with the national policy developments and priorities. The team faced sometimes, delays by policy makers due to various reasons or change in top priorities. Project activities, most importantly the roundtables, had to be designed and held at the appropriate time and with the well-chosen topics so that their outcomes would be useful.

To tackle obstacles such as delays or change of priorities, the team had continuous cooperation with the main stakeholders, national authorities and market representatives, had good knowledge of the European and national policy framework and contacts with a wide range of highly qualified speakers.

- SMAFIN works in parallel with many initiatives and projects in Greece but also at European level and has to share a small number of interested parties since Greece is a small country.

To tackle this obstacle, the team designed collaborations and communication campaigns to trigger interest in social media and the project platform.

4.4 Romania

The continuity of the dialogue along the project engaging a core of strategic institutional stakeholders both in the WGs and RTs was the key to reaching SMAFIN objectives. The WGs kept a stable institutional representativity even with a fluctuation of experts representing these institutions.

Intermingled planning the 9 events (3 RTs and 6 WGs) at appropriate intervals secured stakeholders connection with project progress and facilitated an open dialogue on relevant aspects for the national context of smart energy financing.

Each RT or WG event conclusions/orientations were starting points for the following dialogue opportunity keeping the focus on relevant themes and consolidating the formulation of different proposals for future actions. The WGs meetings (some of them turning into real round table debates), created a trustful environment for sharing information and opening new paths for interinstitutional cooperation. The RTs kept similar continuity approach as regards the central motifs for the themes of the parallel sessions:

- integrated renovation services,
- energy efficiency in industry and SMEs,
- new financing mechanisms to leverage private funds.

Other lessons learned for the organisation of the RTs:

- To involve from the initial steps, relevant central institutions as partners/supporters of the event. Here a threat is the relative often change of the contacts in top positions.
- To work with well-known moderators that can connect SMAFIN to complementary initiatives and enhance the impact of SMAFIN messages and activities. The collaboration with the Chief Editor of the Energynomics media platform, the most effective and competent energy media platform at national level, was a gain.
- To identify relevant speakers, with decisional position and recognised expertise, using their presence on the agenda to further attract high quality participants and ensure a high-level event.
- The participation of international speakers (representatives of EC, FI, experts working in European projects) guaranteed the connection to the latest developments.
- To secure a high quality of the logistics and technical services. Nevertheless, it is worth mentioning that these came with increased costs over the 3 project years.
- A hybrid organisational structure (physical presence, if possible, as main arrangement + additional on-line facility) seems to be optimal.

- Connection of the SMAFIN events topics with the stakeholders plans, challenges and obligations (e.g. NRRP goals etc) to ensure their interest and participation.
- Inviting other projects for shared experience (such as [nZEB Roadshow](#), [PadovaFIT Expanded](#)).

5 CONCLUSIONS

With a view to the sustainability and replication of the SMAFIN project, it was envisaged to develop a methodology package to facilitate potential successors of the initiative, as well as those that are yet to develop the initiative in other countries, to organise RTs on sustainable financing of energy efficiency projects. The document will also help the organisations to make a proper assessment of the budget and resources needed for the entire three-year cycle, namely travel, event organisation, and visualisation of the initiative.

The successors of the initiative were identified for each country participating in the project as follows: Sustainable Energy Development Agency in Bulgaria, Croatian National Bank in Croatia, The Ministry for Energy & Environment in Greece, and Ministry of Public Works, Development and Administration in Romania. The organisations provided the respective Letters of support for the project and were involved in the project activities by participating in the RTs and/or the WG meetings.

The methodology is considered to ensure that the roundtable discussions are structured, focused and action oriented. This includes setting clear objectives, selecting appropriate topics and involving participants who can contribute with different perspectives and experiences. In addition, it provides a framework to foster meaningful dialogue, exchange best practices and explore innovative financing instruments that can accelerate the implementation of energy efficient projects.

The methodology focuses on inclusiveness, transparency and knowledge sharing, creating an enabling environment for building partnerships and mobilising resources for sustainable financing. Experience has shown that by bringing together different stakeholders, roundtables can serve as a catalyst to find practical solutions, remove barriers and stimulate more sustainable financing for energy efficiency projects. They have proven to be a powerful tool to stimulate positive change. The successful implementation of this methodology has the potential to not only accelerate energy efficiency projects, but also to contribute significantly to a more sustainable and resilient energy future for our society.

Moreover, in the summer of 2023, shortly before the end of the SMAFIN project, the partners won funding to continue the initiative for the next three years (2023 - 2026) through the SMAFIN EXPANDED project. Given the experience already gained and the resources already secured, it is most logical that the continuation of the roundtables in Bulgaria, Croatia, Greece and Romania should take place within the new project, but with the full support of the institutions already engaged. In addition, a new country, Slovenia is joining the initiative.

The presented methodology is based on the experience gained and lessons learned during the [SMAFIN](#) project and the review of other projects like [BeSMART](#) and [RoundBaltic](#). It is highly recommendable to explore the results of these initiatives and supplement the knowledge gained from this document, bearing in mind that specific activities should be adapted to the specificities of each country.

6 LETTERS OF COMMITMENT

Organizations that recognize the importance of continuing the initiative and wish to support or succeed it have provided the following Letters of Commitment.



Directorate for Energy Policy
& Energy Efficiency

Athens, July 2023

Letter of Commitment

The Directorate for Energy Policy & Energy Efficiency of the Ministry of Environment and Energy acknowledge that timely response to the major challenges faced by the energy sector in recent years is essential for the development of the energy efficiency market and for accelerating the achievement of the EU energy and climate targets. There is a great need to reduce the investment gap and targeted and effective discussions are essential to remove the barriers that hind the deeper leverage of private funds.

The Ministry of Environment and Energy recognises the importance of the following in accessing more private finance for energy efficiency investments:

- Structural dialogue between all involved stakeholders (Government, local and regional authorities, financial sector, Energy Service Companies (ESCOs), homeowners, industry sector, construction sector and Small and medium-sized enterprises (SME), consumers and citizens associations),
- Co-operation, awareness and capacity building for the development of large-scale investment programmes.
- Development of policy recommendations in order to support national energy policy making

Having been involved to the previous EC initiatives, SEIF & SMAFIN and acknowledging their contribution to the national efforts in the field of energy efficiency financing, the Directorate of Energy Policies and Energy Efficiency of the Ministry, looks forward to receiving SMAFIN methodology package and policy recommendations. Furthermore, it intends to support the continuation of the initiative at national level, joining roundtable discussions and working groups.

Yours sincerely,

Vicky Sita

Head of Directorate

Nr. ieșire 323/28.08.2023

Scrisoare de Susținere

Ref: SMAFIN - Sprijinim finanțarea inteligentă pentru clădiri eficiente energetic în Balcani

Asociația Română a Băncilor (ARB) recunoaște că un răspuns cât mai rapid la provocările majore cu care se confruntă sectorul energetic în ultimii ani este esențial pentru dezvoltarea pieței de eficiență energetică în vederea accelerării atingerii obiectivelor UE privind energia și emisiile prin reducerea decalajului de investiții, iar acesta poate fi facilitat de dezbateri eficiente pentru eliminarea barierelor care împiedică un efect de multiplicare mai profund a fondurilor private.

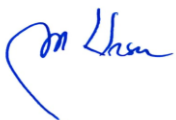
Asociația Română a Băncilor (ARB) recunoaște relevanța accesării mai multor finanțări private pentru investițiile în eficiența energetică prin:

- Dialog structural între toate părțile interesate (Guvern, autorități locale și regionale, sectorul financiar, companii de servicii energetice (ESCO), proprietari de locuințe, sectorul construcțiilor, sectorul industrial și întreprinderile mici și mijlocii (IMM-uri), asociațiile consumatorilor și cetățenilor);
- Dezvoltarea politicilor de investiții în eficiență energetică,
- Cooperare, conștientizare și consolidare a capacității pentru dezvoltarea programelor de investiții pe scară largă.

Ca urmare a experienței acumulate în cadrul forumurilor de investiții în energie durabilă SEIF I & II, SMAFIN și al altor proiecte și inițiative conexe, confirmăm prin prezenta disponibilitatea de a continua sprijinul nostru prin participarea la întâlnirile grupului de lucru și la evenimentele tip masă rotundă sau întâlniri tematice precum și prin contribuții la elaborarea de recomandări și diseminarea de bune practici pentru susținerea de acțiuni eficiente atât ale factorilor de decizie politică, cât și ale actorilor de pe piață.

În calitatea noastră de asociație profesională ce reprezintă băncile din România vom sprijini extinderea rețelei existente de părți interesate care lucrează împreună pentru a propune îmbunătățiri ale politicilor naționale și ale instrumentelor financiare existente, precum și pentru identificarea de noi oportunități de finanțare bazate pe cele mai bune practici europene adaptate specificului național.

Cu stimă,
Cati Ursu
Director Executiv



ASOCIAȚIA ROMÂNĂ PENTRU LOCUINȚE CASA PLUS

SPECIALIȘTI ÎN REGENERARE URBANĂ!



INREGISTRATA IN REGISTRUL SPECIAL CU NR. 15/27.01.2010, COD FISCAL 26590851, NR OPERATOR DATE CU CARACTER PERSONAL 18720, CONT RO31BRDE441SV27951514410, BRD UNIREA, R.N.F.P.A 40/5256/24.07.2019, FURNIZOR FORMARE PROFESIONALĂ
AUTORIZAȚIA SERIA B NR. 0012108, 24.07.2019

Scrisoare de Susținere

Ref: SMAFIN - Sprijinim finanțarea inteligentă pentru clădiri eficiente energetic în Balcani

Asociația Română pentru Locuințe Casa Plus recunoaște că un răspuns cât mai rapid la provocările majore cu care se confruntă sectorul energetic în ultimii ani este esențial pentru dezvoltarea pieței de eficiență energetică în vederea accelerării atingerii obiectivelor UE privind energia și emisiile prin reducerea decalajului de investiții, iar acesta poate fi facilitat de dezbateri eficiente pentru eliminarea barierelor care împiedică un efect de multiplicare mai profund a fondurilor private.

Asociația Română pentru Locuințe Casa Plus recunoaște relevanța accesării mai multor finanțări private pentru investițiile în eficiența energetică prin:

- Dialog structural între toate părțile interesate (Guvern, autorități locale și regionale, sectorul financiar, companii de servicii energetice (ESCO), proprietari de locuințe, sectorul construcțiilor, sectorul industrial și întreprinderile mici și mijlocii (IMM-uri), asociațiile consumatorilor și cetățenilor);
- Dezvoltarea politicilor de investiții în eficiență energetică,
- Cooperare, conștientizare și consolidare a capacității pentru dezvoltarea programelor de investiții pe scară largă.

Ca urmare a experienței acumulate în cadrul forumurilor de investiții în energie durabilă SEIF I & II, SMAFIN și al altor proiecte și inițiative conexe, confirmăm prin prezenta disponibilitatea de a continua sprijinul nostru prin participarea la întâlnirile grupului de lucru și la evenimentele tip masă rotundă sau întâlniri tematice precum și prin contribuții la elaborarea de recomandări și diseminarea de bune practici pentru susținerea de acțiuni eficiente atât ale factorilor de decizie politică, cât și ale actorilor de pe piață.

În calitatea noastră de **ONG**, cu experiența în proiecte de eficiență energetică și de regenerare urbană, vom sprijini extinderea rețelei existente de părți interesate care lucrează împreună pentru a propune îmbunătățiri ale politicilor naționale și ale instrumentelor financiare existente, precum și pentru identificarea de noi oportunități de finanțare bazate pe cele mai bune practici europene adaptate specificului național.

Daniela Florina Huțan

Director

**ASOCIAȚIA ROMÂNĂ PENTRU LOCUINȚE
CASA PLUS**



• Daniela Florina Huțan – Director – mobil 0763.525.845, - email dana.hutan@habitaturban.ro;



DEPARTAMENTUL PENTRU
DEZVOLTARE DURABILĂ

Nr. înreg.:452/DDD/28.08.2023

Către: SMAFIN

În atenția domnului Horia PETRAN

Referitor: Scrisoare de Susținere SMAFIN - Sprijinim finanțarea inteligentă pentru clădiri eficiente energetic în Balcani

Stimate domn,

Departamentul pentru dezvoltare durabilă recunoaște că un răspuns cât mai rapid la provocările majore cu care se confruntă sectorul energetic în ultimii ani este esențial pentru dezvoltarea pieței de eficiență energetică, în vederea accelerării atingerii obiectivelor UE privind energia și emisiile prin reducerea decalajului de investiții. Acesta poate fi facilitat prin dezbateri eficiente pentru eliminarea barierelor care împiedică un efect de multiplicare mai profund a fondurilor private.

Departamentul pentru dezvoltare durabilă - Guvernul României sprijină ferm și recunoaște importanța accesării finanțărilor private pentru investițiile în eficiența energetică prin:

- Dialog structural între toate părțile interesate (Guvern, autorități locale și regionale, sectorul financiar, companii de servicii energetice (ESCO), proprietari de locuințe, sectorul construcțiilor, sectorul industrial și întreprinderile mici și mijlocii (IMM-uri), asociațiile consumatorilor și cetățenilor);
- Dezvoltarea politicilor de investiții în eficiență energetică;
- Cooperare, conștientizare și consolidare a capacității pentru dezvoltarea programelor de investiții pe scară largă.

Ca urmare a participării la forumurile de investiții în energie durabilă SEIF I & II, SMAFIN și al altor proiecte și inițiative conexe, confirmăm prin prezenta disponibilitatea de a participa în continuare la întâlnirile grupului de lucru și la evenimentele tip masă rotundă sau întâlniri tematice, precum și sprijinul în elaborarea de recomandări și diseminarea de bune practici pentru acțiuni eficiente atât la nivelul factorilor de decizie politică, cât și ale actorilor de pe piață.

Colaborarea noastră reprezintă un pas important în realizarea acestor obiective. Printr-un efort comun am dezvoltat idei și strategii pentru promovarea unei societăți durabile și incluzive, în care resursele naturale să fie eficient valorificate.

Departamentul va sprijini extinderea rețelei existente de părți interesate care lucrează împreună, pentru a propune îmbunătățiri ale politicilor naționale și ale instrumentelor



DEPARTAMENTUL PENTRU
DEZVOLTARE DURABILĂ

financiare existente, precum și pentru identificarea de noi oportunități de finanțare bazate pe cele mai bune practici europene adaptate specificului național.

Cu deosebită considerație,

László BORBÉLY

Consilier de Stat





Scrisoare de Susținere

Ref: SMAFIN - Sprijinim finanțarea inteligentă pentru clădiri eficiente energetic în Balcani

Fondul Român pentru Eficiența Energiei recunoaște că un răspuns cât mai rapid la provocările majore cu care se confruntă sectorul energetic în ultimii ani este esențial pentru dezvoltarea pieței de eficiență energetică în vederea accelerării atingerii obiectivelor UE privind energia și emisiile prin reducerea decalajului de investiții, iar acesta poate fi facilitat de dezbateri eficiente pentru eliminarea barierelor care împiedică un efect de multiplicare mai profund a fondurilor private.

Fondul Român pentru Eficiența Energiei recunoaște relevanța accesării mai multor finanțări private pentru investițiile în eficiența energetică prin:

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Ca urmare a experienței acumulate în cadrul forumurilor de investiții în energie durabilă SEIF I & II, SMAFIN și al altor proiecte și inițiative conexe, confirmăm prin prezenta disponibilitatea de a continua sprijinul nostru prin participarea la întâlnirile grupului de lucru și la evenimentele tip masă rotundă sau întâlniri tematice precum și prin contribuții la elaborarea de recomandări și diseminarea de bune practici pentru susținerea de acțiuni eficiente atât ale factorilor de decizie politică, cât și ale actorilor de pe piață.

În calitatea noastră de finanțator dedicat proiectelor de eficiență energetică și energie regenerabilă vom sprijini extinderea rețelei existente de părți interesate care lucrează împreună pentru a propune îmbunătățiri ale politicilor naționale și ale instrumentelor financiare existente, precum și pentru identificarea de noi oportunități de finanțare bazate pe cele mai bune practici europene adaptate specificului național.

Cu stimă,
Fondul Român pentru Eficiența Energiei

Director Executiv,
Adrian GHIȚĂ

Data: 25.08.2023

**LIGA ASOCIAȚIILOR DE PROPRIETARI
H A B I T A T**
ORGANIZAȚIE NAȚIONALĂ A ASOCIAȚIILOR DE PROPRIETARI DIN ROMÂNIA!



INREGISTRATA IN REGISTRUL SPECIAL CU NR. 34/16.10.2003, COD FISCAL 8557733, NR OPERATOR DATE CU CARACTER PERSONAL 17218,
COD IBAN- RO 96 BRDE 441 SV 039 291 34410, BANCA - BRD - UNIREA
DE 31 DE ANI - REPREZENTARE NAȚIONALĂ ȘI INTERNAȚIONALĂ A ASOCIAȚIILOR DE PROPRIETARI DIN ROMÂNIA!
ORGANIZAȚIE MEMBRĂ IUT - INTERNATIONAL UNION OF TENANTS

NR. C035/25.08.2023

Scrisoare de Susținere

Ref: SMAFIN - Sprijinim finanțarea inteligentă pentru clădiri eficiente energetic în Balcani

Liga Asociațiilor de Proprietari Habitat recunoaște că un răspuns cât mai rapid la provocările majore cu care se confruntă sectorul energetic în ultimii ani este esențial pentru dezvoltarea pieței de eficiență energetică în vederea accelerării atingerii obiectivelor UE privind energia și emisiile prin reducerea decalajului de investiții, iar acesta poate fi facilitat de dezbateri eficiente pentru eliminarea barierelor care împiedică un efect de multiplicare mai profund a fondurilor private.

Liga Asociațiilor de Proprietari Habitat recunoaște relevanța accesării mai multor finanțări private pentru investițiile în eficiența energetică prin:

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- Cooperare, conștientizare și consolidare a capacității pentru dezvoltarea programelor de investiții pe scară largă.

Ca urmare a experienței acumulate în cadrul forumurilor de investiții în energie durabilă SEIF I & II, SMAFIN și al altor proiecte și inițiative conexe, confirmăm prin prezenta disponibilitatea de a continua sprijinul nostru prin participarea la întâlnirile grupului de lucru și la evenimentele tip masă rotundă sau întâlniri tematice precum și prin contribuții la elaborarea de recomandări și diseminarea de bune practici pentru susținerea de acțiuni eficiente atât ale factorilor de decizie politică, cât și ale actorilor de pe piață.

În calitatea noastră de **ONG**, ce reprezintă asociațiile de proprietari din România, la nivel național și internațional, de 31 de ani, vom sprijini extinderea rețelei existente de părți interesate care lucrează împreună pentru a propune îmbunătățiri ale politicilor naționale și ale instrumentelor financiare existente, precum și pentru identificarea de noi oportunități de finanțare bazate pe cele mai bune practici europene adaptate specificului național.

Mihai Mereuta

Președinte

LIGA ASOCIAȚIILOR DE PROPRIETARI
H A B I T A T



Make
Housing
a Right
Not a
Privilege

**DREPTUL LA O LOCUINȚĂ DECENTĂ / LOCUIRE DECENTĂ ACCESIBILĂ
CA PREȚ ESTE UN DREPT FUNDAMENTAL AL FIECĂRUI CETĂȚEAN ȘI AR
TREBUI SĂ SE REGĂSEASCĂ ÎN CONSTITUȚIE!**

MIHAI MEREUȚĂ - 0744.751.416; mihai.mereuta@habitaturban.ro;
președinte

Liga Asociațiilor de Proprietari Habitat,