

## **POLICY IMPROVEMENT: Draft action plan & Action plan template**

The Updated version of the Action Plan is divided into two sections, which correspond to two different project stages.

**SECTION 1: by March 2018**, all partners will prepare the first draft of their Action Plan, and will continue working on it until the end of Semester 5 (**September 2018**). Therefore, the first section of the Action Plan is a simplified version, which details proposed policy improvements that need to be further developed within the timeframe of the REBUS project. It should include a work plan to be implemented within the project, which will allow partners to test the feasibility of the proposed improvement.

**SECTION 2:** from October 2018 until the **end of project Phase 1** (end Year 3) this work will lead to completion of the second section of the Action Plan: the final version that details how the policy improvements will be implemented in Phase 2 of the REBUS project (Years 4 and 5). Many of the fields are the same, so partners will not be asked to repeat the work done in Section 1. Rather, they will update and confirm the work and propose a Phase 2 work plan and monitoring system.

N.B. This template is conceived as a living document. Partners will verify the structure and various fields, while they complete the first section. Modifications to the template can be proposed during this time.

### **DRAFT ACTION PLAN – Section 1**

*(from January - September 2018, with first draft ready by March 2018)*

#### **Part I – Policy Context**

<b>Name of the policy instrument addressed</b>	
<b>Territorial and Settlement Development Programme 2014-2020</b>  Priority <b>Axis 3</b> Shift towards a low-carbon economy with special focus on urban areas  Measure 3.2 Improvement of energy efficiency and increase the proportion of renewable energy consumption of the local governments	
<b>MANAGING AUTHORITY</b>	Managing Authority for Regional Development Programmes, Deputy State-Secretariat of Economic Development Programmes, Ministry for National Economy
<b>INDICATORS &amp; TARGET</b>	Reduced primary annual energy consumption in public buildings in kWh/year (ROP indicator) = 179000

**Part II – Details of the Actions Envisaged**

***Please complete all of the section below. If you have more than one Action, please copy all sections and repeat them for each Action Proposed.***

**ACTION 1 - TITLE**

*(i.e. Launch of a new smart grid call, Change in the selection process of projects to be funded by a specific call, Development of a new monitoring system of expected results, etc.)*

Financing more energy efficiency-types of investments in the remaining TOP calls and including additional criteria to rank projects in future SF calls for public building renovations

**Overall Topic and Description of the proposed Policy Improvement**

*please provide a brief summary of the proposed Policy Improvement that this Action refers to. Some examples include:*

- *New selection criteria to select projects included in existing calls*
- *New evaluation criteria to rank projects*
- *New calls launched with a specific focus*
- *New monitoring system of your calls for proposals or your overall policy instrument*
- *New engagement modalities of the energy sector actors, e.g. in the way you co-design a call or you evaluate results...*

The proposed action refers to “New calls launched with a specific focus” in the current, and also “New evaluation criteria to rank projects” in the upcoming programming period, for Structural Funds financed investments.

According to the Managing Authority representative, in the current period the targeted policy instruments (mainly TOP 3.2.1, but also TOP 6.5.1), the remaining calls will be published this year and there will be no more funding available in this programming period for these particular funding instruments.

However, based on the first-round call experiences - and also thanks to REBUS project, that raised the awareness of the MA staff members towards the importance of energy efficiency through introducing international good examples and practices, results -, minor changes/improvements will be realized, which are already reflected in the approved amendment of the TOP 2017 version. Thanks to the intensifying demand for energy efficiency/energy saving investments and also solar panel installments in Hungary, in the new (second/third-round) call, more SF will be allocated to these types of investments instead of e.g. other RES solutions (such as heat pumps or biomass boilers), which were not as popular as first it was expected.

Also, technical annexes will be simplified and optimized in order to inform the applicants

already at the time of submission about how feasible their project proposals really are.

*Based on the REBUS philosophy and GPs learnt, we plan to introduce a proposal-package (including ranking criteria) to raise the awareness of the MA and municipalities implementing SF energy efficiency investments to apply a holistic view regarding energy efficient renovation process, promoting the investments in state-of-the-art building management systems (to adequately monitor and collect data, which currently is not widely applied in Hungary) as well as the continuous and systematic awareness raising and training activities among the policy makers and public building users.*

### **Good practices / Lessons learnt identified**

*please provide a brief description of the GPs/experiences that you wish to use to improve your policy instrument*

We have found all partners' GPs very important, however in particular, the following GPs have influenced our ideas for further actions so far:

- City of Malmö: Mercury project and Human Centric Lighting in Lindeborg School
- Durham County Council: clear and achievable energy saving strategy, concept and their systematic implementation in the form of several inspiring and very practical ways, e.g. through a well-coordinated school carbon reduction programme and an internal initiative to be more energy efficient (the Big Switch Off programme) and Moreover reliable data collection and monitoring of energy use (gas and electricity) via Systems-link programme in county-owned public buildings.

### **How did you learn about the above described GPs / Lesson learnt?**

*please list the meetings, study visits, BERS, staff exchange, webinar, LSG, etc.*

City of Malmö:

- 3<sup>rd</sup> transnational exchange event in Malmö, visiting Lindeborg School
- BER was held via Skype in September 2017.
- Staff exchange was organized (19-20 of March 2018) in Malmö to get more familiar with state-of-the-art planning methods and building management system (SCADA) as well as getting deeper knowledge and further information on innovative approaches, such as the human-centric lighting at the City of Malmö office building and Lindeborg School

Durham County Council:

- BER was held in September 2017 via Skype, which was followed-up with e-mail exchanges to provide further information on The Big Switch Off programme and School Carbon Reduction programme.
- Staff exchange was organized (15-16<sup>th</sup> of May 2018) in Durham to obtain deeper knowledge about the Council's long-term strategies and specific actions/GPs through knowledge exchange with DCC staff members and on-site visits

**Territorial need**

*please provide a brief description of the territorial need addressed by the GPs/experiences that you wish to use to improve your policy instrument. You can refer to the territorial needs identified by each partner in their Context Analysis and summarised during our project meetings in Miskolc, or add a new need whether relevant)*

We have many territorial needs, however, learning more about the partners GPs, we have identified the following 3 areas, where we are most lagging behind on our territory:

- 1) Systematic application and supporting the funding of reliable BMS (monitoring) from SF
- 2) Innovative and simple, cost-effective solutions to reduce energy use in public buildings (implementation)
- 3) Awareness raising for public servants as well as the younger generation towards the long-term benefits of being more responsible for own energy use (capacity building).

**How will you adapt the described GPs / Lesson learnt to your territory?**

*please provide a brief description of the modifications needed.*

*Examples: full transfer of the experience, inspired by the approach, inspired by the implementation, confirmation of new trends based on benchmarking, etc.*

We will not be able to transfer these experiences fully, due to geographical, legal and financial restrictions, however the GPs learnt can highly influence the awareness-level of our LGS members (key actors in the region) and can inspire them to learn more about energy efficiency issues especially regarding the whole public building renovation process (featured in the ERP document). We are hoping to provide our actors with a very useful document (ERP) which they can apply as a guidebook and refer to in their every-day work.

**Next Steps: work plan within REBUS**

*please list and describe the practical activities to be implemented in order to check the feasibility of this Policy Improvement at regional level and through interregional exchange*

**Activities to be carried out at regional level**

*In this first draft you should focus on activities to be carried out from January 2018 to March 2019.*

*Please also insert activities already carried out, i.e. Meeting with MA to analyse the lessons learnt, meeting with stakeholders to discuss the lessons learnt, Investigate further Lesson learnt 1, Writing a first draft of AP, etc. Add as many lines as necessary.)*

Activity Number	Activity Description	Timing (month/year or specific date where possible)
1	First draft of Action Plan	May 2018

2	3 <sup>rd</sup> LSG Meeting	30 <sup>th</sup> of May 2018
3	Meeting with MA representative to analyse the lessons learnt and their potential incorporation in the TOP call	25-27 <sup>th</sup> of June 2018
4	4 <sup>th</sup> LSG meeting to update the AP	July 2018
5	5 <sup>th</sup> LSG meeting to update the AP	September 2018
6	6 <sup>th</sup> LSG meeting to finalize the AP	February 2019
7	Finalizing AP	March 2019

**Activities to be carried out at interregional level**

*In this first draft you should focus on activities to be carried out from January 2018 to March 2019. Please insert activities already carried out. Add as many lines as necessary.*

Activity Number	Activity Description		Timing (month/year or specific date if possible)
	Type of Activity (please choose 1)	Activity Description	
1	BER (please indicate with whom and if there is a specific GP)	1) PNEC (50/50 project) 2) CRETE (Green University Programme)	June 2018
2	Staff exchange (please indicate with whom and if there is a specific GP)	1) Malmö 2) Durham-Malmö-SERDA	1) 19-20 March 2018 2) 15-16 May 2018
3	Input from outside the consortium / Policy Platform (please describe and specify if you have already identified whom you wish to engage)	1) If our capacity building GP is accepted, it will be uploaded to Policy Platform 2) With the support of ENERGIACLUB (external expert and LSG member), creating synergies with other projects with similar topic (eCentral) in the frame of dissemination event	1) May-June 2018 2) 27. June 2018., Florence
Etc.			

**Stakeholders involved**

*please indicate the organisations in the region who will be involved in the policy improvement process – add as many lines as necessary*

Name of Organisation / person	Role in Action Plan (max.200 characters)
Financial Ministry/József Vasas	Managing Authority for TOP 3.2.1 and TOP 6.5.1. We will continuously negotiate with him to influence national policy for upcoming calls (SF funds).
Borsod-Abaúj-Zemplén County Municipality/Erzsébet Telegdi	The County Municipality has a key role in influencing current and upcoming SF calls and implementing local policy measures. Therefore we intend to negotiate with them and obtain updates on how the planning process is going concerning energy efficient renovations.
City of Miskolc/Judit Barczy	The City Municipality has a key role in influencing current and upcoming SF calls and implementing local policy measures. Therefore we intend to negotiate with them and obtain updates on how the planning process is going concerning energy efficient renovations and RES use.
Ecological Institute for Sustainable Development Foundation/Zsuzsanna F. Nagy	The local NGO has a wide range of knowledge on climate change issues, sustainability and energy efficiency. They are also providing high quality and targeted information to different organizations according to their special needs. They have a key role in the elaboration of the Action Plan, to provide professional support to us on specific actions.
ÉMI Nonprofit LLC/Lajos Vass	ÉMI Non-Profit Limited Liability Company for Quality Control and Innovation in Building (ÉMI Non-profit Llc.) is Hungary's largest complex building and construction materials industry approval, testing, inspection, certification, professional and innovation institution, and a member of a number of European and international organizations (EOTA, EGOLF, ENBRI, WFTAO, CIB, ECTP, UEAtc). They have a role to provide feedback on the planned actions.
ENERGIACLUB/Orsolya Fülöp	This actor has been working on energy issues for more than 26 years in Hungary as a private, nonprofit NGO. Its work

	concentrates on climate and energy policy, energy efficiency, renewable energy, climate mitigation and adaptation. They conduct research activities, develop SECAPs for municipalities, provide training courses and carry out communication campaigns targeting policy makers, energy producers and consumers. They continue to support us with their expertise in the elaboration of the AP.
Innocity LLC/Zsuzsanna Váradi and Mesterterv LLC/László Zvolenszki	Private companies; planners and climate change and energy experts. Their role is to provide feedbacks on the planned actions.
Municipality of Zugló/Örs Szokolay	A local municipality in Budapest with many good practices on energy efficient solutions. They provide feedback on the planned actions.
School District Headquarters of Miskolc/Róbert Fazekas (Ferenc Földes High School)	Representative of public schools. They will provide feedbacks on the planned actions.
National Energy Expert Network/	This organization is fairly new in Hungary, their role is to support local actors with their energy efficiency investments and related issues. They will be involved concerning awareness raising aspects.
Lechner Knowledge Center/	This organization is just setting up the so called State Public Building Cadastre, funded by ESF from SF. They will have an important role in the upcoming period to collect and manage the state-owned public buildings though this cadastre system, therefore their knowledge is also very crucial in providing feedbacks on the planned actions.

### Risk and Contingency Plans

*please describe what you see as the main potential risks related to this Policy Improvement and eventual contingency plans – add as many lines as necessary*

Description of Risk	Level of probability (High, Medium, Low)	Description of Contingency Plan
Limited influence on national level policy-making	High	Continuing the involvement of MA representatives in the

and Managing Authorities		project activities through transnational exchange events and LSG workshops as well as personal consultations
Lack of interest on planning and implementing local actions on energy efficiency	Medium	We further intend to engage the key influencing actors and also external experts in the planning process and inform them about project and AP progress and results
Uncertainties regarding next programming period funding possibilities in the frame of SF for energy efficiency investments	Medium	Continuous cooperation with related actors (MA, B-A-Z county, City of Miskolc) to obtain reliable information on the overall planning process

**ACTION PLAN TEMPLATE – Section 2****(from October 2018 to March 2019 - end of phase 1)**

Produced by each region, the **action plan** is a document providing details on **how** the lessons learnt from the cooperation will be exploited in order to improve the policy instrument tackled within that region. It specifies the nature of the actions to be implemented, their timeframe, the players involved, the costs (if any) and funding sources (if any). If the same policy instrument is addressed by several partners, only one action plan is required.

**Part I – General information**

Project: _____
Partner organisation: _____
Other partner organisations involved (if relevant): _____
Country: _____
NUTS2 region: _____
Contact person: _____
• email address: _____
• phone number: _____

**Part II – Policy context**

The Action Plan aims to impact:
○ Investment for Growth and Jobs programme
○ European Territorial Cooperation programme
○ Other regional development policy instrument
Name of the policy instrument addressed: _____

**Part III – Details of the actions envisaged**

<b>ACTION 1</b>
1. The background (please describe the lessons learnt from the project that constitute the basis for the development of the present Action Plan)
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2. Action (please list and describe the actions to be implemented)

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3. Players involved (please indicate the organisations in the region who are involved in the development and implementation of the action and explain their role)

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4. Timeframe

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5. Costs (if relevant)

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6. Funding sources (if relevant):

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**ACTION 2**

7. The background (please describe the lessons learnt from the project that constitute the basis for the development of the present Action Plan)

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8. Action (please list and describe the actions to be implemented)

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9. Players involved (please indicate the organisations in the region who are involved in the development and implementation of the action and explain their role)

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10. Timeframe

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11. Costs (if relevant)

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12. Funding sources (if relevant):

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**ACTION X**

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Stamp of the organisation (if available): \_\_\_\_\_