

More and better designed national public support for energy technology Research and Innovation

# Analysis of the industry's funding needs for the implementation of the SET Plan

### D2.3 Analysis of the industry's funding needs

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WP 2 – Further define adequate financial strategies /T.2.2 Analysis of industry's funding needs for the realisation for the SET Plan Implementation Plans.
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www.smartspend.eu



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## Partners



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# List of abbreviations and acronyms

<b>CEF</b> : Connecting Europe Facility
cPPP: Contractual Public-Private Partnership
CSA: Coordination and Support Action
<b>DG</b> : Directorate-General
<b>EFSI</b> : European Fund for Strategic Investments
EIB: European Investment Bank
EIF: European Investment Fund
EIP: European Innovation Partnership
EIS: European Innovation Scoreboard
<b>EIT</b> : European Institute of Innovation and Technology
EJP: European Joint Programme
ERDF: European Regional Development Fund
ERIC: European Research Infrastructure Consortium
ETP: European Technology Platform
FOAK: First-of-a-kind
<b>H2020</b> : Horizon 2020
JPI: Joint Programming Initiative
KIC: Knowledge Innovation Community
<b>MS</b> : Member State
NCP: National Contact Point
<b>P2P</b> : Public to Public Partnerships
<b>R&amp;D</b> : Research and Development
R&D&I: Research, Development and Innovation
R&I: Research and Innovation
<b>RES:</b> Renewable Energy Sources
SME: Small and medium-sized enterprises



# 1. Executive & publishable summary

The SMARTSPEND project aims for more and better designed public support for energy technology Research & innovation supporting the execution of the Strategic Energy Technology Plan (SET Plan) of the European Commission. SMARTSPEND main objectives are to foster efficiency in allocation of public and private funding, and to better inform stakeholders and engagement with policy makers.

To develop this report, a series of consultations were undertaken including a questionnaire with 105 participants and interviews to relevant stakeholders from different sectors (Energy Systems, Photovoltaics, Energy Efficiency Solutions for Buildings, Energy Efficiency in Industry and Smart Cities). The main areas of interest of the questionnaire were related to existing funding mechanisms' gaps for the implementation of the SET Plan, existing funding mechanisms' barriers (e.g. administrative, legal, fiscal), sector specific issues and needs of the sector. The complete list of interviewed companies and who carried out the interview is included in the Annex III of this report. Via the open questions in the questionnaire and the phone interviews conducted with some of the participants, it was possible to identify other funding mechanisms and other barriers than those mentioned in the questionnaire. Importantly, a better understanding of the industries views and concerns was developed beyond the statistical/quantitative analysis of each analysed funding mechanism.

The quantitative and qualitative analysis of the industry's experience on funding mechanisms and entities is presented in the report. The report takes into consideration the need for financial contributions from public and private funding sources at different levels and analyses the main constraints (bureaucratic, administrative, legal) which can compromise the regular execution of R&I activities and implementation of the SET Plan.

A better understanding of the industries' views and concerns was developed with reference to potential measures and improvements in the fields of funding mechanisms, project management, funding applications, budget and reporting, amongst others.

The main findings on the industry's funding needs for the implementation of the SET Plan, as collected from the quantitative and qualitative analysis of the feedbacks provided by the participants, are presented in the conclusions of this report. The conclusions are related to specific funding needs for the scale up of specific entities (like SMEs), for certain categories of projects (like those that produced working prototypes or demonstrators) and for specific types of technologies (like market-uptake and manufacturing in cutting edge technologies). In the conclusions are also highlighted some specific needs for more funding for certain funding schemes or the need to consider different types of indicators for receiving the funding. Other conclusions are also related on how to make certain funding schemes more attractive.



What are the results that might be disseminated?				
Analysis of the Industry's Funding Needs				
Main stakeholder	s to be addresse	ed by the results of the	deliverable	
Туре				
Public				
Main events and a	ctivities related	d to the results of the de	liverable (also orga	nised by third parties)
Title	Date	Press release	Target audience	
1 ETIP SNET March 2020 Workshop			Stakeholders interested in available funding opportunities, funding needs o the industry, implementation of the technology pillar of the EU's energy and climate policy and industry, energy system integration.	
Dissemination too (consider budget /	ls: what sort of r ′ time)	materials can be created	l to contribute to di	sseminate the results?
□ Photographs	🗆 Video	X Power point	Papers	□Poster Created by
X News for project website	Networki opportunities	king  Course Training	X Seminar	X Social network
Potential Paper				
Title Authors				
Other dissemination suggestion or comments from the DLV authors				



# 2. Report objectives

This report provides an outlook of the industry's funding needs in order to support the coordination of the industrial participation in the SET Plan, in particular from the industry-driven associations and initiatives such as JA-2 calls, the European Technology and Innovation platforms (ETIPs) and importantly the industrial actors identified in the 11 identified sectors (Materials, Bioenergy, PV, Deep Geothermal, Energy Storage, Energy-efficient Buildings, Energy-efficient industry, Renewable Heating and Cooling, Ocean, Smart Networks, Wind).

This information is intended to assist industry in considering their funding needs, also taking into consideration the main findings of D 2.1. "Mapping of Funding Instruments". The approach in this guide is not to describe every specific sector's funding needs, but rather to focus on a broad picture of the industry funding needs as a whole.

This document is due in month 12 as deliverable D2.3.

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# 3. Overview of methodologies

### How the questionnaire was developed

This report contains a questionnaire T2.2. – "Analysis of industry's funding needs for the realisation for the SET Plan Implementation Plans" which was elaborated by ZABALA, based on consultations within SMARTSPEND's network of partners, with the purpose of better identifying the industry and/or research sector funding needs.

The SMARTSPEND partners are the following, the full list of their members (over one thousand altogether) is available on each website:

- 1. EUREC (Scientific coordinator) www.eurec.be
- 2. OEE (Ocean Energy) www.oceanenergy-europe.eu
- 3. EMIRI (Advanced materials for clean energy & clean mobility) www.emiri.eu
- 4. CIRCE Foundation in representation of SPIRE (Process industry) www.spire2030.eu
- 5. ZABALA Brussels in representation of ETIP SNET (Smart energy networks) www.etipsnet.eu
- 6. WIP in representation of ETIP PV (Photovoltaics) www.etip-pv.eu
- 7. ESTELA (Solar thermal electricity (concentrated solar power) www.estelasolar.org
- 8. EASE (Energy Storage) www.ease-storage.eu
- 9. EGEC (Geothermal) www.egec.org
- 10. ECTP (Energy-efficient buildings and construction) www.ectp.org/
- 11. FNR In representation of ETIP Bioenergy (Bioenergy) www.etip-bioenergy.eu

The main areas of interest of the questionnaire were:

- Existing funding mechanisms' gaps for the implementation of the SET Plan
  - Lack of innovative financing mechanisms tailor-made per sector and per the level of maturity of markets and technologies;
  - Lack of specific Clean Energy Funding (They are part of either global package or part of research and innovation topics.).
- Existing funding mechanisms' barriers (e.g. administrative, legal, fiscal)
  - Clarity of the application process (The evaluation process is not always clear and lacks information in most of the cases.);
  - Lack of synergies between different funding programmes;
  - Great administrative disparity between different levels of public funding (regional, national, European).
- Sector specific issues
- Needs of the Sector



### How it was disseminated

The questionnaire was circulated by ZABALA amongst the partners of the SMARTSPEND project and their associates/members in order to collect their feedback in accordance to their sector's needs. SMARTSPEND's partners disseminated the questionnaire through their channels (e.g. emailing members of their associations, social media, etc.).

In addition to the questionnaire, each partner suggested 2-3 companies to be interviewed. The companies were selected on the basis of their representation of the sector and on the basis of previous relevant experience in applying for funding. Following this selection, they were contacted and those that were available were interviewed.

Interviews started from mid-September 2019. Guidelines for these interviews were provided. The results of the consultation that are included in this report will be shared with key stakeholders and high-level policy makers in order to design together better funding instruments.



### Structure of the questionnaire

The questionnaire used in the survey comprised 16 questions divided in 6 sections, in addition to a one-page document on the SET Plan priorities as well as a concluding page allowing respondents to add comments. The questionnaire's different sections

#### 1. Profile

Name of the association, name of the company, nature of the organisation, sector and size of organization, country.

#### 2. Existing Funding Mechanisms

Enquiring about the participants' knowledge and experience with the addressed funding mechanisms.

#### 3. Existing Barriers

This section included multiple choice and open questions to identify barriers the participants may have faced.

#### 4. Potential Measures and Improvements

This section included multiple choice and open questions to identify potential measures and improvements the participants may find relevant.

#### 5. Conclusion and comments

Respondents were invited to provide any additional comments. On completing the questionnaire, respondents are thanked and redirected to the SMARTSPEND website in order to learn more about the project.



### How the interviews were conducted

9 interviews with stakeholders from the different sectors were covered by the SMARTSPEND project between 15<sup>th</sup> September and 15<sup>th</sup> October. These interviews lasted between 30 and 40 minutes and followed the same topics addressed in the questionnaire, looking to **deepen them** and get a **more detailed** and **direct input regarding the stakeholders' sectors**. A copy of the questionnaire was used by the interviewer as a support document during the interviews and some of them were also recorded in order to improve the quality and accuracy of the collected data during the interview.

The interview was structured in the following 5 different sections:

**Section 1 – General Data** This section included general data related to the identification of the participant and the partner conducting the interview and the type of activities undertaken by the participant in order to have a clear view of the analysed sector.

**Section 2 – Funding instruments** This section was aimed at getting a better insight of the relevant funding instruments for the analysed sector and the experience of the participant in the identification and implementation of these funding mechanisms.

**Section 3 – Barriers** This section was aimed at deepening the knowledge of the experience of the participants on the main obstacles/barriers encountered in these financing schemes.

**Section 4 – Potential Improvements** This section was aimed at deepening the knowledge of the experience of the participants in the application and implementation process of the identified funding mechanisms, lessons learnt and potential measures to be taken to overcome these obstacles.

**Section 5 – Further Comments** This section served as an open question for any remarks the participant might want to include, and which fall outside the previous questions.



# 4. Characterising the respondents

A total of 105 participants replied to the SMARTSPEND questionnaire on the industry's funding needs. The respondents' locations are shown in Figure 1 and Figure 2 and reflect a good geographical distribution of respondents across Europe with 20 countries represented. However, they do not include representatives from all H2020 associated countries nor all EU member states.

The highest number of responses (13) was received from Italy, followed by France with 11 and Belgium and Spain both with 10.



Figure 1 - Number of participants per country (total numbers)



Figure 2 - Share of participants per country



Regarding the type of entity, the participants came from, the majority, 55%, came from Business Companies, while the second most represented type was Research Centres with 28%. 11% came from Other types of entities such as Public Bodies and Education Institutions. The distribution can be seen in Figure 3.





Looking into the size of the participants' entities (Figure 4), it can be seen that 52% are SMEs having up to 250 employees. It is interesting to observe as well that 28% of the participants came from very large companies, with over 1000 employees.



Figure 4 - Share of Participants' Companies Per number of employees



As for the sectors the participants are active in, the majority (55%) are active in Energy Systems, followed by Photovoltaics, Energy Efficiency Solutions for Buildings, Energy Efficiency in Industry and Smart Cities, all around 30%. This can be explained with the fact that participants could select more than one sector in which they were active and the broad scope of the Energy Systems sector. See Figure 5.



Figure 5 - Share of participants per sector



# 5. Analysis of the industry experience on funding mechanisms and entities

This chapter focuses on the analysis of the industry experience on funding mechanisms and entities and is based on the quantitative analysis of each funding mechanism through the feedbacks received in the quantitative section of the questionnaire, on the analysis of the qualitative section (open questions) of the questionnaire and of the phone interviews. Via the open questions in the questionnaire and the phone interviews conducted with some of the participants, it was possible to identify other funding mechanisms and other barriers than those mentioned in the questionnaire. Importantly, a better understanding of the industries views and concerns was developed beyond the statistical/quantitative analysis of each analysed funding mechanism. In order to ensure the validity of the conclusions in this report only the data coming from the participants who already had applied to the funding mechanisms considered was taken into consideration. Although more data could have been analysed for those who have no experience it could have jeopardized the accuracy of the outputs. As such some funding mechanisms outputs come from smaller pools of participants but their indications remain relevant.

#### Industry view on Funding mechanisms

### H2020 (programme)

**H2020 definition:** Horizon 2020 is the eighth framework programme funding research, technological development, and innovation. The framework programme's objective is to complete the European Research Area (ERA) by coordinating national research policies and pooling research funding in some areas to avoid duplication. The programme runs from 2014–20 and provides an estimated €80 billion of funding, an increase of 23 per cent on the previous phase. Horizon 2020 provides grants to research and innovation projects through open and competitive calls for proposals.

Focusing on H2020 Topic Calls, 103 of the 105 participants had knowledge of them, and of these 94 had applied for funding. A strong majority of 78 participants had already received funding from this mechanism (See Table 1).

 Table 1 - Participants' experience with H2020 topic calls

Experience with H2020 Topic Calls



No Experience	Have knowledge	Have applied	Have received funding
2	103	94	78

When asked about the severity of the barriers they had encountered in H2020 topic calls, only 9% claimed to have faced major barriers, while 27% stated they had not faced any (See Figure 6).



Figure 6 - H2020 severity level of barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 7, 8 and 9.



Figure 7 - Share of participants who have applied for H2020 and have faced these barriers - Part 1



From the barriers in Figure 7, it is possible to see that 47% of the participants believe **that the application process is complicated and exhaustive**. In addition, **the lack of investment funding when there are high up-front costs** (22%) and **the process from idea to implementation being too long** (23%) can be seen as commonly felt barriers.



Figure 8 - Share of participants who have faced these barriers in H2020 - Part 2

From the barriers in Figure 8, it is possible to see that the main barrier highlighted for H2020 grants are **administrative and bureaucratic barriers for new business models** (30% of the participants had this opinion). It is worth mentioning that **20% of respondents believe that H2020 Grants are not suited for industry-led projects**.

Beyond these, it can also be concluded that other barriers mentioned in the questionnaire where results are below 7%, such as the level of confidentiality of information requested in the application, do not constitute a major barrier.





Figure 9 - Share of participants who have faced these barriers in H2020 - Part 3

From the barriers in Figure 9, it is possible to see that with 67% of the participants having faced them, **low success rates often do not justify the investment in the application** to H2020 calls. Moreover, 35% of participants feel that **reporting is too complicated and time consuming.** 

In H2020 calls, the participants' general view is that the **applications and project management processes do not take into account the uncertain nature of research and development**: a set work plan is supposed to be fixed at the time of application and updating it can be seen as extremely cumbersome.

They also reflect **difficulty** in **implementing** all the **expected impacts of a call**, which also makes it difficult to find a suitable consortium. In addition to this, it is **complicated** to add other **important industrial partners during on-going H2020 projects**, this could **maximize a project's impact**.

Participating representatives of SME have highlighted the time and effort to develop a good proposal, which is demanding on their human and financial resources, often preventing them from applying. However, these issues do not end with the success of a proposal. The administrative, bureaucratic, financial procedures are very resource and time consuming for companies throughout the projects themselves. These factors lead to a certain reluctance of companies to participate in the calls.



### NER 300 (programme)

**NER 300 Definition:** NER 300 is a funding programme pooling together about EUR 2 billion for innovative low-carbon technology, focusing on the demonstration of environmentally safe Carbon Capture and Storage (CCS) and innovative renewable energy technologies on a commercial scale within the EU.

Focusing on NER 300, 30 of the 105 participants had knowledge of them, and of these 11 had applied for funding. Only 6 participants had already received funding from this mechanism (See Table 2).

Table 2 – Participants' experience with NER 300

Experience with NER 300			
No Experience	Have received funding		
75	30	11	6

When asked about the severity of the barriers they had encountered in NER 300, 44% claimed to have faced major barriers, while only 17% stated they had not faced any (See Figure 10).



Figure 10 – NER 300 severity level of barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 11, 12 and 13.





Figure 11 - Share of participants who have applied for NER300 and have faced these barriers - Part 1

From the barriers in Figure 11, it is possible to see that the great majority of the participants believe that **the application process is complicated and exhaustive**.

In addition, a large majority feel that there is a **lack of investment funding when there are high up-front costs**, as well as a **lack of interconnection between the different programmes**.



Figure 12 - Share of participants who have faced these barriers in NER300 - Part 2

From the barriers in Figure 12, it is possible to see that 73% of the participants believe that **administrative and bureaucratic barriers for new business models** are a common barrier. A significant number has also felt that the **information requested is private/confidential.** 





Figure 13 - Share of participants who have faced these barriers in NER300 - Part 3

From Figure 13 it can be concluded that **more than half of the participants believe that low success rates do not justify the investment in the application**. Moreover, with 36%, "Funding only given after the project results are obtained" is also an important barrier.

### InnovFin (programme)

**InnovFin definition:** "InnovFin – EU Finance for Innovators" is a joint initiative launched by the European Investment Bank Group (EIB and EIF) in cooperation with the European Commission under Horizon 2020. InnovFin aims to facilitate and accelerate access to finance for innovative businesses and other innovative entities in Europe.

Focusing on InnovFin, 26 of the 105 participants had knowledge of them, but none of the participants have applied for funding. (See Table 3).

Table 3 - Participants' experience with InnovFin

Experience with InnovFin			
No Experience	Have knowledge	Have applied	Have received funding
79	26	0	0

When asked about the severity of the barriers they had encountered in InnovFin, 25% claimed to have faced major barriers, while only 37% stated they had not faced any (See Figure 14).



This high value can be justified by the fact few participants had knowledge of InnovFin, not recognising in it any barrier.



Figure 14 - InnovFin Severity Level of Barriers

It is not possible to analyse the specific barriers the participants have encountered when applying as none of the participants have applied for InnovFin funding.

### LIFE (Programme)

**LIFE description:** The LIFE programme is the EU's funding instrument for the environment and climate action created in 1992. The current funding period 2014-2020 has a budget of  $\notin$  3.4 billion. 3.4 billion.

44 of the 105 participants had no experience of LIFE. 61 of the participants had knowledge of LIFE and of these 25 had applied for funding and 20 of them had received it (See Table 4).

Experience with LIFE			
No Experience	Have knowledge	Have applied	Have received funding
44	61	25	20

When asked about the severity of the barriers they had encountered in LIFE, 7% claimed to have faced major barriers, 37% medium barriers, 34% minor barriers, while 22% stated they had not faced any (See Figure 15).





Figure 15 - LIFE Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 16, 17 and 18.



Figure 16 - Share of participants who have applied for LIFE and have faced these barriers - Part 1

From Figure 16, almost one third of the participants believe there is a **lack of investment funding when there are high up-front costs** in LIFE projects. A significant number was also of the opinion that LIFE application processes are complicated and exhaustive.





Figure 17 - Share of participants who have faced these barriers in LIFE - Part 2

Not many participants felt the barriers from Figure 17 in LIFE calls. It is noteworthy that **very** few felt the information requested is private or confidential for them or that the application procedures vary significantly.



Figure 18 - Share of participants who have faced these barriers in LIFE - Part 3

On the other hand, from Figure 18, it is possible to see that almost half of the participants have felt that **the reporting in LIFE is too complicated and time consuming**, and that often the **low success rates do not justify the investment in the application**.



### Connecting Europe Facility – CEF (Programme)

**CEF Description:** The Connecting Europe Facility (CEF) is a key EU funding instrument to promote growth, jobs and competitiveness through targeted infrastructure investment at European level. It supports the development of high performing, sustainable and efficiently interconnected trans-European networks in the fields of transport, energy and digital services. CEF investments fill the missing links in Europe's energy, transport and digital backbone.

76 of the 105 participants had no experience of CEF, 29 had knowledge of CEF, of these 10 had applied for funding and 7 of them had received it (See Table 5).

Table 5 - Participants' experience with CEF

Experience with CEF			
No Experience	Have knowledge	Have applied	Have received funding
76	29	10	7

When asked about the severity of the barriers they had encountered in CEF, 6% claimed to have faced major barriers, 33% medium barriers, 17% minor barriers, while 56% stated they had not faced any (See Figure 19).



Figure 19 - CEF Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 20, 21, 22.





Figure 20 - Share of participants who have applied for CEF and have faced these barriers - Part 1

As seen in Figure 20, almost half the participants believe that the **application process in CEF** is complicated and time-consuming, with the same number believing that there is a lack of investment funding when there are high up-front costs in projects. A smaller but relevant number also missed interconnection between the different programmes, as well as moving from the original idea to its implementation being too long.



Figure 21 - Share of participants who have faced these barriers in CEF - Part 2

From Figure 21, it is possible to see that a strong share of the participants believe that the **grants are not suited for industry-led projects** in CEF, while a slightly smaller number also identified **administrative and bureaucratic barriers for new business models**.





Figure 22 - Share of participants who have faced these barriers in CEF - Part 3

From the barriers in Figure 22, it is possible to see that the **reporting being too complicated and time consuming** was an opinion shared by almost half of the participants. A non-negligible number was also concerned about the **lack of transparency in the evaluation** process and have felt that the **low success rates do not justify the investment in the application** for CEF funding.

### ERANETs (Initiative)

**ERANETs definition:** ERA-NET Cofund under Horizon 2020 is designed to support Public-Public Partnerships, including Joint Programming Initiatives between Member States, in their preparation, establishment of networking structures, design, implementation and coordination of joint activities as well as Union topping-up of a trans-national call for proposals. main and compulsory activity of the ERA-NET Cofund under Horizon 2020 is the implementation of the co-funded joint call for proposals that leads to the funding of trans-national research and/or innovation projects.

Focusing on ERANETs, 70 of the 105 participants had knowledge of them, and of these 30 had applied for funding. 21 participants had already received funding from this mechanism (See Table 6).

Table 6 - Participants' experience with ERANETs

Experience with ERANETs			
No Experience	Have knowledge	Have applied	Have received funding



35 70 30	21
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When asked about the severity of the barriers they had encountered in ERANETs, 22% claimed to have faced major barriers, while only 13% stated they had not faced any (See Figure 23).



Figure 23 - ERANETs Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 24, 25 and 26.



Figure 24 - Share of participants who have applied for ERANETs and have faced these barriers - Part 1



From Figure 24, it is possible to see that over half of the participants believe that **the application process is complicated and exhaustive** in ERANETs. In addition, the lack of investment funding when there are high up-front costs was seen as a common barrier by 27% of the participants.



Figure 25 - Share of participants who have faced these barriers in ERANETs - Part 2

In Figure 25, it can be seen that 27% of the participants have experienced **great variation of application procedures** as an important barrier in ERANETs. Beyond this, 23% of participants often felt that **grants are not suited for industry-led projects.** 



Figure 26 - Share of participants who have faced these barriers in ERANETs - Part 3



From Figure 26, 23% of the participants felt that the **low success rates do not justify the investment in the application**. Other important barriers for a significant number of the participants have been **the geographic imbalance** in ERANETs, as well as the **unpredictability of their R&I programmes**.

Moreover, participants also find it difficult to **keep track of all ERANETs**, as given their number and diversity, **visibility is often minute**. Adding this factor to low funding rates, **participants feel disengaged**.

### EUREKA (Initiative)

**EUREKA description:** EUREKA is an intergovernmental network launched in 1985, to support market-oriented R&D and innovation projects by industry, research centres and universities across all technological sectors. It is composed of 41 member states, including the European Union represented by the Commission and three associated states – Canada, South Africa and South Korea. With its flexible and decentralised network, EUREKA offers project partners rapid access to skills and expertise across Europe and national public and private funding schemes.

56 of the 105 participants had knowledge of EUREKA, of which 21 had applied for funding and 12 of them had received it (See Table 7).

Experience with EUREKA			
No Experience	Have knowledge	Have applied	Have received funding
49	56	21	12

Table 7 - Participants' experience with EUREKA

When asked about the severity of the barriers they had encountered in EUREKA, only 9% claimed to have faced major barriers, while 21% stated they had not faced any (See Figure 27).





Figure 27 - EUREKA Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 28, 29 and 30.



Figure 28 - Share of participants who have applied for EUREKA and have faced these barriers - Part 1

From Figure 28, it is possible to see that the most important barrier for the participants was **the lack of interconnection between different programmes**. Other barriers that were widely felt by the participants in EUREKA were the **application process being complicated and exhaustive**, as well as the **lack of investment funding when there are high up-front costs**.




Figure 29 - Share of participants who have faced these barriers in EUREKA - Part 2

From Figure 29, it can be seen that participants feel that the **grants are not suited for industryled projects**, while the other options do not have a significant weight.



Figure 30 - Share of participants who have faced these barriers in EUREKA - Part 3

According to 19% of the participants, **reporting in EUREKA is too complicated and time consuming and low success rates do not justify the investment in the application** (Figure 30). The remaining barriers do not seem to be widely faced.



## Joint Programming Initiative JPI (Initiative)

**JPI description:** Joint Programming is a structured and strategic process whereby Member States agree, on a voluntary basis and in a partnership approach, on common visions and Strategic Research and Innovation Agendas (SRIA) to address major societal challenges. After the development of a common vision and the launch of the SRIA common activities of each Joint Programming Initiative (JPI) can be implemented including e.g. joint calls, so-called fast track activities, knowledge hubs, task forces etc.

84 of the 105 participants had no experience of JPI. 21 of the participants had knowledge of JPI and of these 4 had applied for funding and 2 of them had received it (See Table 8).

Table 8 - Participants' experience with JPI

Experience with JPI					
No Experience Have knowledge Have applied Have received funding					
84	21	4	2		

When asked about the severity of the barriers they had encountered in JPI, 11% claimed to have faced major barriers, 22% medium barriers, 33% minor barriers, while 34% stated they had not faced any (See Figure 31).



Figure 31 - JPI Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 32, 33, 34.





Figure 32 - Share of participants who have applied for JPI and have faced these barriers - Part 1

Half of the participants in JPI calls felt that there is a **lack of investment funding when there are high up-front costs**, as well as **lack of interconnection between the different programmes**. Moreover, due to these and other factors, for them **the application process is complicated and exhaustive**.



Figure 33 - Share of participants who have faced these barriers in JPI - Part 2

Half the participants also faced **administrative and bureaucratic barriers for new business models** and believe there is a **great variation of application procedures in JPI calls** (see Figure 32).





Figure 34 - Share of participants who have faced these barriers in JPI - Part 3

A vast majority of participants have felt that the **evaluation process is not transparent** in JPIs. This can lead to low application numbers, together with the fact that half the participants feel that **low success rates do not justify the investment in the application** (see Figure 34).

## EFSI

**EFSI Description:** EFSI is an initiative launched jointly by the EIB Group – the European Investment Bank and European Investment Fund – and the European Commission to help overcome the current investment gap in the EU. EFSI is one of the three pillars of the Investment Plan for Europe that aims to revive investment in strategic projects around the continent to ensure that money reaches the real economy.

63 of the 105 participants had no experience of EFSI, 42 had knowledge, of these 1 had applied for funding and received it (See Table 9).

Table 9 - Participants' experience with EFSI

Experience with EFSI				
No Experience Have knowledge Have applied Have received funding				
63	42	1	1	



When asked about the severity of the barriers they had encountered in EFSI, 11% claimed to have faced medium barriers, 33% minor barriers, while 56% stated they had not faced any (See Figure 35).



Figure 35 - EFSI Severity Level of Barriers

Given that only one participant had applied for funding, the specific barriers' analysis reflects only their agreement (100%) or disagreement (0%). See Figures 36, 37 and 38.



Figure 36 - Share of participants who have applied for EFSI and have faced these barriers - Part 1



It is possible to see that the participant recognized most of the barriers from Figure 36, stating however that they **do not feel the felt that the funding is too focused on practical results instead of research**.



Figure 37 - Share of participants who have faced these barriers in EFSI - Part 2

Similarly, to the previous analysis, the participant also agreed with most of the barriers from Figure 37, while **not believing that the requested information is private or confidential.** 



Figure 38 - Share of participants who have faced these barriers in EFSI - Part 3

As for the barriers in Figure 38, although the participant recognized many of them in EFSI, they did not feel any geographical imbalance in the calls or that funding being given after the projects results were obtained were issues.



## National funding mechanisms

Focusing on National funding mechanisms, 96 of the 105 participants had knowledge of them, and of these 79 had applied for funding. 71 participants had already received funding from this mechanism (See Table 10).

*National funding mechanisms definition:* Include national public research funding mechanisms across Europe with 20 countries represented.

Table 10 - Participants' experience with National Funding Mechanisms

Experience with National Funding Mechanisms				
No Experience Have knowledge Have applied Have received funding				
9	96	79	71	

When asked about the severity of the barriers they had encountered in National funding mechanisms, 40% claimed to have faced minor barriers, while only 12% claimed to have faced major barriers (See Figure 39).



Figure 39 - National Funding Mechanisms' severity level of barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 40, 41 and 42.





Figure 40 - Share of participants who have applied for National funding mechanisms and have faced these barriers - Part 1

From Figure 40, it is possible to see that slightly over one third of the participants believe that **the application process in national funding mechanisms is complicated and exhaustive**, followed by the feeling that there is **lack of investment funding when there are high up-front costs in projects**.



Figure 41 - Share of participants who have faced these barriers in National funding mechanisms - Part 2

Although most of the barriers in Figure 41 were not strongly felt by the participants, nonetheless circa one quarter of them believe that there is a **great variation of application procedures.** 





Figure 42 - Share of participants who have faced these barriers in National funding mechanisms - Part 3

Similarly, to the previous analysis, around one quarter of the participants highlighted that **low success rates often do not justify the investment in the application** to national funding, and when applications are successful the **reporting is too complicated and time consuming**.

## Regional funding mechanisms

**Regional funding mechanisms definition:** Include regional public research funding mechanisms across Europe with 20 countries represented.

Focusing on Regional funding mechanisms, 90 of the 105 participants had knowledge of them, and of these 58 had applied for funding. 49 participants had already received funding from this mechanism (See Table 11).

Experience with Regional Funding Mechanisms				
No Experience Have knowledge Have applied Have received fundin				
15	90	58	49	

Table 11 - Participants' experience with Regional Funding Mechanisms

When asked about the severity of the barriers they had encountered in Regional funding mechanisms, 39% claimed to have faced minor barriers, while only 13% claimed to have faced major barriers (See Figure 43).





Figure 43 - Regional Funding Mechanisms' severity level of barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 44, 45 and 46.



Figure 44 - Share of participants who have applied for Regional funding mechanisms and have faced these barriers - Part 1

From Figure 44, almost one third of the participants believe the application process in regional funding is complicated and exhaustive, and that there should be some investment funding given when projects have high up-front costs.





Figure 45 - Share of participants who have faced these barriers in Regional funding mechanisms - Part 2

While most of the barriers in Figure 45 seem not to be very significant, some participants identify a great variation of application procedures and that at times the grants are not suited for industry-led projects.



Figure 46 - Share of participants who have faced these barriers in Regional funding mechanisms - Part 3

Although regional funding applicants do not feel most of the barriers in Figure 46, it is possible to see that a significant number do believe the reporting is too complicated and time consuming.



## Other Funding Mechanisms

From the input received in the interviews and in the qualitative parts of the questionnaire, the following funding mechanisms have been used by the participants to help in the development of clean energy technologies besides those addressed previously:

- <u>COST</u>: European Cooperation in Science and Technology is a funding organisation for research and innovation networks.
- <u>ELENA</u>: ELENA is a joint initiative by the EIB and the European Commission under the Horizon 2020 programme. ELENA provides grants for technical assistance focused on the implementation of energy efficiency, distributed renewable energy and urban transport programmes.
- <u>Erasmus+</u>: A funding scheme programme to support activities in the fields of Education, Training, Youth and Sport.
- <u>The Fast Track to Innovation (FTI)</u> is central part of the European Innovation Council (EIC) pilot, targeting radically new, breakthrough products, services, processes or business models that open up new markets.
- <u>Tenders from the EC</u>: Open and upcoming calls for funding proposals

## **Industry view on Funding entities**

## EIT-KICs (Entity)

**EIT-KICs description:** The European Institute of Innovation & Technology (EIT) is an independent body of the European Union set up in 2008 to deliver innovation across Europe. The EIT brings together leading business, education and research organisations to form dynamic cross-border partnerships. KICs 'Knowledge and Innovation Communities' create a pan-European network and carry out a whole range of activities that cover the entire innovation chain – including training and education programmes, reinforcing the journey from research to the market, innovation projects as well as business incubators and accelerators.

54 of the 105 participants had knowledge of EIT-KICs, of these 14 had applied for funding and 13 of them had received it (See Table 12).



Table 12 - Participants' experience with EIT-KICs

Experience with EIT-KICs				
No Experience Have knowledge Have applied Have received funding				
51	54	14	13	

When asked about the severity of the barriers they had encountered in EIT-KICs, 12% claimed to have faced major barriers, while 24% stated they had not faced any (See Figure 47).



Figure 47 - EIT-KICs Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 48, 49 and 50.





Figure 48 - Share of participants who have applied for EIT-KICs and have faced these barriers - Part 1

In Figure 48, it is possible to see that over half the participants believe there is a lack of interconnection between the different programmes in EIT-KICs. A large share of the participants also felt that the application process is complicated and exhaustive.

On the other hand, only a small minority believes that the process from idea to implementation is too long, so it is possible to conclude it is not a barrier.



Figure 49 - Share of participants who have faced these barriers in EIT-KICs - Part 2

From Figure 49, it is possible to see that 43% of the participants believe that there is a **great variation of application procedures in EIT-KICs.** To a minor extent, a significant number has also encountered **administrative and bureaucratic barriers for new business models**.



In **EIT-KICs**, similarly to ERANETs, participants also feel that the calls can be very open, **not** restricting topics to certain areas.

## InnoEnergy (Entity)

**InnoEnergy description:** InnoEnergy is the innovation engine for Europe's energy industry that invest in businesses and help develop innovative products, services, and solutions that have high commercial potential. InnoEnergy provide access to a deep pool of complementary skills and resources and connect them to markets and commercial opportunities across Europe.

47 of the 105 participants had no experience of InnoEnergy. 58 of the participants had knowledge of InnoEnergy and of these 9 had applied for funding and 6 of them had received it (See Table 13).

Table 13 - Participants' experience with InnoEnergy

Experience with InnoEnergy				
No Experience Have knowledge Have applied Have received funding				
47	58	9	6	

When asked about the severity of the barriers they had encountered in InnoEnergy, 9% claimed to have faced major barriers, 17% medium barriers, 44% minor barriers, while 30% stated they had not faced any (See Figure 50).



Figure 50 - InnoEnergy Severity Level of Barriers



As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 51, 52 and 53.



Figure 51 - Share of participants who have applied for InnoEnergy and have faced these barriers - Part 1

From Figure 51, it is possible to see that almost the entirety of the participants believes the application process to be complicated and exhaustive. One third of them also feels the lack of investment funding when there are high up-front costs to be a constraint.



Figure 52 - Share of participants who have faced these barriers in InnoEnergy - Part 2

Another third of the participants have identified **strong administrative and bureaucratic barriers for new business models** deriving from InnoEnergy projects (see Figure 52).





Figure 53 - Share of participants who have faced these barriers in InnoEnergy - Part 3

From Figure 53, it is possible to see that one third of the participants believe the **evaluation to be non-transparent**, while also stating **low success rates do not justify the investment in the application**. None of the participants thought there is geographic imbalance in InnoEnergy calls or that the R&I programmes are unpredictable.

## EASME (Entity)

**EASME description:** The Executive Agency for Small and Medium-sized Enterprises (EASME) has been set-up by the European Commission to manage on its behalf several EU programmes in the fields of SME support & innovation, environment, climate action, energy and maritime affairs.

48 of the 105 participants had knowledge of EASME calls such as the SME instrument, of which 17 had applied for funding and 11 of them had received it (See Table 14).

Experience with EASME			
No Experience	Have knowledge	Have applied	Have received funding
57	48	17	11

Table 14 - Participants' experience with EASME



When asked about the severity of the barriers they had encountered in EASME, only 12% claimed to have faced major barriers, while 30% stated they had not faced any (See Figure 54).



Figure 54 - EASME Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 55, 56 and 57.



Figure 55 - Share of participants who have applied for EASME and have faced these barriers - Part 1



From Figure 55, it is possible to see that the **application process in EASME calls is complicated and exhaustive** for a large portion of the participants. There are also many who feel there is **a lack of interconnection between the different programmes**.



Figure 56 - Share of participants who have faced these barriers in EASME - Part 2

From Figure 56, it is possible to see that almost one quarter of the participants have faced administrative and bureaucratic barriers for new business models.



Figure 57 - Share of participants who have faced these barriers in EASME - Part 3

In Figure 57, a non-negligible amount of participants have claimed that the **reporting is too** complicated and time consuming as well as that there is a lack of transparency in the evaluation.



Under EASME, participants believe that the **SME Instrument** should have topics/areas separated from each other, so companies from different sectors do not compete against each

other (e.g. Health technologies against Clean Energy). As for the **Fast Track to Innovation**, its requirement for "disruption" is not clearly explained, leaving participants unsure whether their projects are suitable.

## EIB (Entity)

**EIB Description:** The European Investment Bank is the lending arm of the European Union. Is the biggest multilateral financial institution in the world and one of the largest providers of climate finance.

55 of the 105 participants had knowledge of EIB, of these 7 had applied for funding and 5 of them had received it (See Table 15).

Table 15 - Participants' experience with EIB

Experience with EIB				
No Experience Have knowledge Have applied Have received fund				
50	55	7	5	

When asked about the severity of the barriers they had encountered in EIB, 11% claimed to have faced major barriers, while 39% stated they had not faced any (See Figure 58).





Figure 58 - EIB Severity Level of Barriers

As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 59, 60 and 61.



Figure 59 - Share of participants who have applied for EIB and have faced these barriers - Part 1

In Figure 59, it is possible to see that over half of the participants believe that there is a **lack** of interconnection between the different programmes in the EIB, together with a complicated and exhaustive application process. This can lead to the process from idea to implementation to be too long.



On the other hand, few participants think the funding is too focused on practical results and not research.



Figure 60 - Share of participants who have faced these barriers in EIB - Part 2

From Figure 60, it is possible to see that a large majority of the participants faced administrative and bureaucratic barriers for new business models when applying for EIB

funding. A smaller but still significant number also felt that often the **information requested is private/confidential** for them, and that the **grants are not suited for industry-led projects**.



Figure 61 - Share of participants who have faced these barriers in EIB - Part 3

From Figure 60, it is possible to see that almost half of the participants believe the **R&I** programmes can be unpredictable, with slightly fewer also having the opinion the low success rates do not justify the investment in the application procedure.



## International Energy Agency (IEA) (Entity)

**International Energy Agency (IEA) definition:** The International Energy Agency acts as energy policy advisor to 29 Member Countries plus the European Commission, in their effort to ensure reliable, affordable, and clean energy for their citizens. Current work focuses on climate change policies, market reform, energy technology collaboration and outreach to the rest of the world, especially major producers and consumers of energy like China, India, Russia and the OPEC countries.

Focusing on the IEA, 52 of the 105 participants had knowledge of it, 14 of them having applied for funding and 10 receiving it. (See Table 16).



Experience with IEA				
No Experience Have knowledge Have applied Have received funding				
53	<b>5</b> 2	14	10	

When asked about the severity of the barriers they had encountered in IEA, only 5% claimed to have faced major barriers, while 57% stated they had not faced any (See Figure 62).



Figure 62 - IEA Severity Level of Barriers



As for the specific barriers the participants have encountered when applying, the results can be seen in Figures 63, 64 and 65.



Figure 63 - Share of participants who have applied for IEA and have faced these barriers - Part 1

From Figure 63, it is possible to see that half of the participants believe that there is a **lack of interconnection between the different programmes**. In addition, the **lack of investment funding when there are high up-front costs** has been felt by 29% of the participants.

Beyond these, it can also be concluded that other barriers mentioned in the questionnaire where results are below 7%, such as the funding being too focused on practical results and not research do not have a significant impact on applicants.



Figure 64 - Share of participants who have faced these barriers in IEA - Part 2



From Figure 64, it is possible to see that 21% of the participants believe that **grants not suited for industry-led projects**. Beyond this, it can also be concluded that the remaining barriers do not seem to be of great importance.



Figure 65 - Share of participants who have faced these barriers in IEA - Part 3

In Figure 65, it can be seen that 29% of the participants believe that the **low success rates do not justify the investment in the application**.

Beyond this, it can also be concluded that the remaining barriers do not seem to be as commonly felt in IEA.

The main findings related to the industry experience on the above described funding mechanisms and main barriers can be summarised as follow:

#### Funding mechanisms:

 A strong majority of participants had already received H2020 funding. Almost half of them faced administrative and bureaucratic barriers and consider the application process for H2020 to be complicated and exhaustive with a low success rate that does not necessarily justify the investment in the application. Difficulties were highlighted in implementing all the expected impacts of a call, which also makes it difficult to find



a suitable consortium. Participating representatives of SMEs claim that the time and effort to develop a good proposal is often a deterrent to apply.

- Most of the participants had no knowledge of NER 300, with those who had already applied having faced a severe level of administrative and bureaucratic barriers.
- The majority of the participants had no knowledge of InnovFin and none of them had previously applied.
- The vast majority of participants had experience with LIFE, almost one fourth had applied and 20 of them received funding. Almost half of the participants claimed that the reporting is too complicated and time consuming.
- The vast majority of participants had no experience with CEF. Of those who had applied, more than one third claimed that grants were not suited for industry-led projects.
- The vast majority of the participants had knowledge of ERANETs, more than one fourth had applied for funding of which almost all had received funding from this mechanism. Participants feel that calls for ERANETs can be more open and not restricting certain topics or certain areas. The low funding rates make the participants feel disengaged.
- Half of the participants had knowledge of EUREKA, of which 21 had applied for funding and 12 of them had received it. Lack of interconnection between the different programmes is the most important barrier participants have encountered in EUREKA.
- The vast majority of participants had **no experience with JPI**. Those who had participated had felt a strong **lack of transparency in the evaluation**.
- The vast majority of participants had no experience with EFSI and only one participant had applied and received funding.
- The vast majority of participants had applied and received funding from **national funding schemes.** Almost one fourth of those who had applied believed that **application procedures vary greatly**.
- The vast majority of participants had applied for regional funding schemes and almost the half of them received funding. One fourth of them believe that the



**application process is complicated and exhaustive** and that there is lack of investment funding when there are high up-front costs.

#### **Funding entities**

- Focusing on the **IEA**, around half the participants had knowledge of it, 14 of them having applied for funding. Only 5% of participants claimed to have faced major barriers, while 57% stated they had not faced any.
- Lack of interconnection between the different programmes is the most important barrier participants have encountered in EIT-KICs.
- The vast majority of participants had knowledge of InnoEnergy and considered the application process to be complicated and exhaustive.
- Half the participants had no knowledge of EASME calls. Of those who did, more than one third believe that the application process is complicated and exhaustive and more than one fourth that there is a lack of transparency in the evaluation. Participants believe that the SME Instrument should have topics/areas separated from each other and ideally divided by sectors.
- Half the participants had knowledge of the EIB instruments. All of those who had already applied claimed administrative and bureaucratic barriers and believe the R&I programmes to be very unpredictable.

## 6. Potential Measures and Improvements

All 105 participants provided their feedbacks in the section "Potential Measure and Improvement" of the questionnaire. In it, they classified whether suggested measures and improvements were relevant or not to them.





Figure 66 - Potential Measures and Improvements - Part 1

From the potential measures and improvements in Figure 66, it is possible to see that the vast majority (70%) believe that "Applications should have 2 stages - a first simple one and a second more elaborate for those approved" is a relevant measure to be taken. Furthermore, 63% of participants state that "Shared infrastructures should be available for funded projects." in accordance with the relevancy of each of the suggested measures and improvements.





Figure 67 - Potential Measurements and Improvements - Part 2

From the potential measures and improvements in Figure 67, 56% of participants believe that "Mid-term reviews should be instated", and 47% that there should be "VAT/Tax exemptions in initial stages of a project". It is difficult to conclude whether participants are for or against the termination of projects which are not performing as 56% are in favor and 54% against. However, 50% do believe that if a project is performing well but its focus has changed it should not be cancelled.





Figure 68 - Potential Measures and Improvements - Part 3

From the potential measures and improvements in Figure 68, 81% of participants believe that "EU funding needs to support industrial-scale market-uptake and manufacturing in cutting edge technologies", and 70% that "There should be investment not just for R&I but also new business models". A large majority of 68% also states that "More capital is needed for SMEs to be able to upscale". It is difficult to conclude if there should be more H2020 calls with smaller budgets or the other way around as those in favor and against are very close in number (43% and 50%, respectively).





Figure 69 - Potential Measures and Improvements - Part 4

From the potential measures and improvements in Figure 69, 80% of participants believe that "More funding is needed specially for demonstrators", and 70% that "National regulations should be more in sync". Although 50% believe "The creation of an Insurance and Guarantee Fund" could lower the uncertainty costs of projects" it is difficult to see it as widespread approval given 41% did not express their opinion.

Beyond this analysis, which was undertook with the data collected through the questionnaire, an analysis has also been done taking into consideration the direct input gathered from the interviews and the questionnaire's open questions. This input was not structured to be statistically analysed but rather open questions to get input to broaden the scope of the questionnaire.

The main potential measures can be divided into the following sections: **Project Management**, **Funding Application**, **Funding Mechanisms**, **Technology Readiness Level**, **IPR**, **Budget and Funding**, **Reporting** and **Calls**.

#### Project Management

- Smaller consortiums structures with up to 5 partners were suggested in order to deliver quicker results.
- A ruling service for admissible costs to remove uncertainty before spending was suggested.
- In cases where the results have deviated, participants suggested the creation of an intermediate evaluation for all projects to carefully evaluate if the new results are interesting or relevant.



• It was suggested that funding programmes should take into account the changeable reality during the lifetime of a project, which could mean that initially agreed activities should be changed and modified to a new reality.

#### Funding application

- Two-stage applications were considered as favored (where relevant). Indeed, it was suggested that the first stage should comprise only a brief explanation of the project idea. If the idea does not fit in the funding programme, a lot of work could be avoided losing less time on a project if it does not seem solid enough from the beginning.
- It was highlighted that the evaluation procedures are transversely very long and was suggested the creation of procedure calls for projects with higher TRL level (6-7 and above).
- The majority of participants highlighted that there is too much focus on administrative accuracy and not result accuracy. This may be jeopardizing the actual results of the projects.
- A more specific language for the calls of proposal was suggested in order to have a better wording of the calls that allow the applicants to check whether a project idea fits into it.
- It was highlighted that the rules and application processes are very different for European projects than for national projects and that uniformization could be helpful.
- In some European schemes (like Eurostars and ERANET projects) when a project is selected for funding after the first submission and evaluation of the proposal, another submission is required at national level in the national language. This implies more time, efforts and costs.

#### Funding mechanisms

- Improve the synergies and synchronization between European programmes, but also between national and European programmes.
- Quick evaluation processes and a shorter project duration will substantially contribute to make certain funding schemes more attractive.
- The published information and the info sessions are not always enough even for specialists.
- More funding should be given to successful projects so their results can then be open to the public.



- It was as suggested to establish a framework of shared results and that more results should be made public.
- More funds for expansion of infrastructure should be made available.
- There should be funding to follow up on projects that produced working prototypes (key exploitable results), to be scaled up.
- A balance between independent and centralized funding options could be more efficient.
- Funding mechanisms sometimes are too complex and was suggested the creation of a sort of a guideline with the basic introduction to different European funding mechanisms.

#### Technology Readiness Level:

- According to the feedback received the TRLs should not be the only indicator given that they may not be relevant for energy R&D where different parts of the system may be at very different levels of maturity, and where some aspects (especially software ones) can move very rapidly from concept to commercial implementation.
- The TRL scale can be unclear, good for pure technological review but not for market and social impact for the project to be considered successful. Another scale can be being used like for instance the TIL (Technology Impact Level).
- It was highlighted that it is easy to find low TRL funding instruments at national level, not so much higher TRL.
- Unclear definition of what is close to market.

#### IPR

• IPR management, should be more open after the end of the project.

#### **Budget and Funding**

 Budgets should continue to be based on an effort assessment basis but for individual deliverables, payment should be based on delivery only so that there is a clear incentive to deliver and a benefit for organizations which manage to deliver more efficiently.

#### Reporting



- The mid-term reports and the final project reports executed by independent reviewers/experts, should always be complemented by the visits to the coordinators main facilities and to validate the stage of development of the expected outcomes/pilot units/prototypes.
- It was also stated that the cancellation of projects, should be based on clear and predefined criteria and milestones.

#### Calls

- There should be a more concentrated focus on some core R&D issues of bottleneck nature.
- Some participants suggested that the topics could be more general in order to have more flexibility to apply the needed research.
- Some funding schemes (like those from EASME for SMEs) should receive more funding because too many good ideas are dropped due to the competition.



# 7. Conclusions on the industry's funding needs

The **majority** of the 105 participants that provided feedback to this report came from **Business Companies (55%)**, while the second most represented type were Research Centres (28%) followed by other types of entities such as Public Bodies and Education Institutions (11%). Within the companies, the **majority** of the participants are **SMEs** followed by very large companies, **mainly active** in the sector of **Energy Systems**, followed by Photovoltaics, Energy Efficiency Solutions for Buildings, Energy Efficiency in Industry and Smart Cities.

From the analysis of the industry's funding needs for the implementation of the SET Plan the conclusions below can be obtained.

- As difficulties in accessing funding represent an obstacle for starting and growing a business and the lack of finance prevents SMEs from investing in innovative projects, improving their productivity, and seizing opportunities in expanding or new markets, the large majority of participants considered that improved access to finance is needed to boost SME scale-up.
- It was highlighted that there should be specific funding to follow up on projects that produced working prototypes, to be scaled up and the majority of participants consider that more funding is needed for demonstrators. It was highlighted by the most of participants that there should be an investment focus for new business models.
- A vast majority of participants believe that EU funding needs to support industrial-scale market-uptake and manufacturing in cutting edge technologies.
- The majority of participants also think **that shared infrastructures should be available for funded projects.**
- It was suggested that funding programmes should take into account the changeable reality during the lifetime of a project, which could mean that initially agreed activities should be changed and modified to a new reality. More funding should be allocated to successful projects so their results can then be open to the public.
- It was highlighted that some funding schemes (like the EIC Accelerator grant & equity funding opportunity from EASME) should receive more funding because as these are highly competitive opportunities too many good ideas are disregarded or do not receive funding.
- The technology readiness level **(TRL) should not be the only indicator** to be considered for receiving funding, given that they may not be relevant for energy R&D related projects



where different parts of the system may be at very different levels of maturity, and where some aspects (especially software ones) can move very rapidly from concept to commercial implementation. Was also highlighted **that TRL scale could be unclear** for instance in the definition of what is close to market and can be useful for pure technological review but not for market and social impact for the project to be considered successful. Another parameter that was suggested to be taken in consideration was the TIL (Technology Impact Level).

- It was highlighted that **some calls should not restrict the topics** to certain areas and could be more general in order to have more flexibility to apply the needed research.
- It was highlighted that a better balance between independent and centralized funding options could be more efficient and that improved synergies and synchronization between European programmes, but also between national and European programmes are needed.
- Some of the participants consider that **quick evaluation processes and a shorter project duration** will substantially contribute to make certain funding schemes **more attractive**.
- It was also highlighted that the published information and the info sessions are not always enough even for specialists and that as funding mechanisms sometimes are too complex, practical guidelines with the basic introduction to the different European funding mechanisms could be useful.


# 8. Annexes

# Annex I – Questionnaire

18/12/2019

Analysis of the industry's funding needs

#### Analysis of the industry's funding needs

SMARTSPEND is an EU-funded project that aims to find new ways to coordinate and increase investments in clean energy Research & Development.

Many energy technologies are trying to answer similar R&D questions. There may be ways to sequence research in different sectors to increase its impact. An important step towards this goal is to identify the industry's funding needs.

This 10 minutes questionnaire focuses on different industrial players' experience and knowledge with different funding mechanisms/programmes/organisations. It includes short multiple-choice and open questions regarding barriers and needs each of the respondents has encountered when applying or receiving funding.

The results will feed into a report which will provide an outlook of the industry's funding needs and will be shared with stakeholders in order to design better funding mechanisms/programmes/organisations.

The following questions were created based on consultations within SMARTSPEND's network of partners.

If you would like to know more about the SMARTSPEND project, please visit our website: www.smartspend.eu

\*Required

# Section 1 - Profile

Profile of the entity

1. Q. 1/16 - Which country are you based in?\*

 Q. 2/16 - How many employees/researchers does your company/institution have?\* Mark only one oval.

$\subset$	) 1 to 10
$\subset$	) 11 to 50
$\subset$	51 to 250
$\subset$	251 to 1000

Over 1000



Ar	alysis of the industry's funding needs
3. Q. 3/16 - In which sector(s) do you work	c in? *
Tick all that apply.	
Photovoltaics	
Concentrated Solar Power	
Offshore Wind	
Ocean Energy	
Deep Geothermal	
Smart Cities	
Energy Systems	
Energy Efficiency Solutions for Build	ings
Energy Efficiency in Industry	
Batteries	
Bioenergy and Renewable Fuels	
Carbon Capture and Storage/Utilisat	ion
Other:	
4. Q. 4/16 - Nature of your company/institu	ution? *
Mark only one oval.	
Research Centre	
Business company	
Association	

Non-profit organisation

Other:

5. Q. 5/16 - Name of your company/institution?

### Glossary

Brief explanation of some funding mechanisms/programmes/organisations addressed in this questionnaire:

NER 300 - Funding for demonstration of environmentally safe Carbon Capture and Storage (CCS) and innovative renewable energy (RES) technologies on a commercial scale within the European Union.

InnovFin Energy Demo Projects - Covers a wide range of loans, guarantees and equity-type funding, which can be tailored to innovators' needs. Financing is either provided directly or via a financial intermediary, most usually a bank or a fund.

ERANET - Funding instruments designed to support public-public partnerships instruments, mainly 'tops-up' funding for single joint calls and transnational actions.

EIT-KIC - Training and education programmes, reinforcing the journey from research to the market, innovation projects, as well as business incubators and accelerators.

EUREKA - European network developing cooperation between SMEs, research centres and universities for industrial innovation.

EASME - European Agency for Small and Medium Enterprises.

LIFE - EU's funding instrument for the environment and climate action.

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18/12/2019

#### Analysis of the industry's funding needs

JPI - Aligns national programmes by jointly coordinating their research and funding new transnational research activities.

InnoEnergy - To build an operational framework amongst the three actors of the knowledge triangle in the energy sector: industry, research and higher education.

## Section 2 - Existing Funding Mechanisms

 Q. 6/16 - Please, from the following funding mechanisms/programmes/organisations, select your experience with each of them. You can select more than one kind of experience. \*

Tick all that apply.

	Have knowledge	Have applied	Have received funding	No experience
H2020 Work Programme Calls				
NER 300				
InnovFin Energy Demo Projects				
International Energy Agency				
ERANETs				
EIT-KICs				
EUREKA				
EASME				
European Investment Bank				
European Fund for Strategic Investment				
Connecting Europe Facility (CEF)				
LIFE				
JPIs				
InnoEnergy				
National Funding Programmes				
Regional Funding Programmes				

7. Q. 7/16 - Would you like to add other funding mechanisms/programmes/organisations connected to Clean Energy Research & Development?

Section 3 - Existing Barriers



#### Analysis of the industry's funding needs

 Q. 8/16 - Please, from the following funding mechanisms/programmes/organisations, select those with which you have experience and have found barriers. You can select more than one kind of barriers. \*

Tick all that apply.

	No barriers	Minor barriers	Medium barriers	Major barriers	No experience
H2020 Work Programme Calls					
NER 300					
InnovFin Energy Demo Projects					
International Energy Agency					
ERANETs					
EIT-KICs					
EUREKA					
EASME					
European Investment Bank					
European Fund for Strategic Investment					
Connecting Europe Facility (CEF)					
LIFE					
JPIs					
InnoEnergy					
National Funding Programmes					
Regional Funding Programmes					

# Section 4 - Existing Barriers



#### Analysis of the industry's funding needs

 Q. 9/16 - For each of the following mechanisms/programmes/organisations, please select the most important barriers, if any. You can select more than one or none. *Tick all that apply.*

	The funding is too focused on practical results and not research	The application process is complicated and exhaustive	Process from idea to implementation is too long	Lack of investment funding when there are high up-front costs	Lack of interconnection between the different programmes
H2020 Work Programme Calls					
NER 300					
InnovFin Energy Demo Projects					
International Energy Agency					
ERANETs					
EIT-KICs					
EUREKA					
EASME					
European Investment Bank					
European Fund for Strategic Investment					
Connecting Europe Facility (CEF)					
LIFE					
JPIs					
InnoEnergy					
National Funding Programmes					
Regional Funding Programmes					





#### Analysis of the industry's funding needs

 Q. 10/16 - For each of the following mechanisms/programmes/organisations, please select the most important barriers, if any. You can select more than one or none. *Tick all that apply.*

	Retroactive changes in the financing schemes	Grants not suited for industry- led projects	Great variation of application procedures	Information requested is private/confidential	Administrative and bureaucratic barriers for new business models
H2020 Work Programme Calls					
NER 300					
InnovFin Energy Demo Projects					
International Energy Agency					
ERANETs					
EIT-KICs					
EUREKA					
EASME					
European Investment Bank					
European Fund for Strategic Investment					
Connecting Europe Facility (CEF)					
LIFE					
JPIs					
InnoEnergy					
National Funding Programmes					
Regional Funding Programmes					

# Section 4 - Existing Barriers



#### Analysis of the industry's funding needs

 Q. 11/16 - For each of the following mechanisms/programmes/organisations, please select the most important barriers, if any. You can select more than one or none. *Tick all that apply.*

	Unpredictability of R&I programmes	Low success rates do not justify the investment in the application	Geographic imbalance	Lack of transparency in the evaluation	Reporting is too complicated and time consuming	Funding only given after the project results are obtained
H2020 Work Programme Calls						
NER 300						
InnovFin Energy Demo Projects						
International Energy Agency						
FIT-KICs						
EUREKA						- H
EASME						
European Investment Bank						
European Fund for Strategic Investment						
Connecting Europe Facility (CEF)						
LIFE						
JPIs						
InnoEnergy						
National Funding Programmes						
Regional Funding Programmes						

12. Q. 12/16 - Would you like to add more barriers?

### Section 5 - Potential Measures and Improvements

What makes an attractive funding mechanism for innovation in energy, in your opinion?



#### Analysis of the industry's funding needs

 Q. 13/16 - Please indicate if you believe the following statements to be relevant or not. Please, choose only one option. \* Mark only one oval per row.

Not Relevant Relevant No opinion 1 - Applications should have 2 stages - a first simple one and a second more elaborate for those approved 2 - There should be a stage gate approach 3 - Recognition of experience should include experience in other funding mechanisms/programmes 4 - H2020 reporting model should be used for national and regional mechanisms 5 - Shared infrastructures should be available for funded projects 6 - VAT/Tax exemptions in initial stages of a project 7 - Mid-term reviews should be instated 8 - Projects should be cancelled if they are not performing. Their funding would be reallocated to better performing projects 9 - Projects should be encouraged to continue even if initial results are not promising 10 - Projects which deviate from their original focus should be cancelled. Their funding would be reallocated to other/new projects 11 - EU funding needs to support industrial-scale market-uptake and manufacturing in cutting edge technologies 12 - More capital is needed for SMEs to be able to upscale 13 - There should be investment not just for R&I but also new business models 14 - There should be fewer H2020 work programme calls but with a larger budget 15 - here should be more H2020 work programme calls but with a smaller budget 16 - National regulations should be more in sync (e.g. licenses, authorisations) 17 - More funding is needed specifically for demonstrators 18 -

14. Q. 14/16 - Would you like to add more needs or improvements?

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https://docs.google.com/forms/d/1X0bLlcm9wEVFJKa-A497--ZPJ1MEE4Syx7QQq9rgXX8/edit



# Annex II – Interview Guidelines



More and better designed national public support for energy technology Research and Innovation

# Guidelines to conduct the interview for D2.3. "Analysis of the Industry's Funding <u>Needs"</u>

WP 2- Further define adequate financial strategies

T.2.2 - D 2.3. Analysis of the Industry's Funding Needs

Author: José Trindade; Juan Sanciñena; Luca Pira. (ZABALA)

September 2019



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INTRODUCTION

This document serves as a guideline during the interviews with stakeholders from the different sectors covered by the SMARTSPEND project. These interviews are not intended to have a long duration, somewhere around 20 minutes.

It follows the same topics addressed in the questionnaire, looking to deepen them and get a more detailed and direct input regarding the stakeholders' sectors.

The following sections are analysed in this document:

- 1. Section 1 General Data
- 2. Section 2 Funding instruments
- 3. Section 3 Barriers
- 4. Section 4 Potential Improvements
- 5. Section 5 Further Comments

As such, please use a copy of the questionnaire as a support document during the interviews.

If possible, record the interview to improve your notes after the interview.

Ask if the participant/organisation may be quoted in the report.

Use the excel document provided to write down the participants' replies.

Please send your notes to ZABALA until the 15th October so they may be included in the report.





# Guidelines/ Questions

## Section 1 – General Data

This section will include general data related to the identification of the participant and the partner conducting the interview and the type of activities undertaken by the participant in order to have a clear view of the analysed sector.

Questions:

- 1. Profile:
  - a. Name of the participant;
  - b. Entity;
  - c. Nature of the entity;
  - d. Sector
  - e. Position;
  - f. Country.
- Please provide more details of your work within your sector. What is your range of activities (in research and/or industry)?

## Section 2 – Funding instruments

This section is aimed at getting a better insight of the relevant funding instruments for the analysed sector and the experience of the participant in the identification and implementation of these funding mechanisms.

Questions:

- Considering the funding mechanisms mentioned in the questionnaire, is there
  one or several whose experience you could share? What is its importance for
  your sector?
- 2. Are there other funding mechanisms relevant for your sector which are not mentioned in the questionnaire? What is your experience with them?

### Section 3 – Barriers

This section is aimed at deepening the knowledge of the experience of the participants on the main obstacles/barriers encountered in these financing schemes.

Questions:

 In the funding mechanisms you mentioned (both in the questionnaire and not), did you encounter any barriers? Which ones? How did they influence your application process and following outcome (funded or not funded)? (Note: use the barriers in the questionnaire as examples)





# Section 4 – Potential Improvements

This section is aimed at deepening the knowledge of the experience of the participants in the application and implementation process of the identified funding mechanisms, lessons learnt and potential measures to be taken to overcome these obstacles.

Questions:

- 1. What are some lessons you have learnt while applying for funding?
- In the funding mechanisms you have mentioned, what are some potential measures and improvements you would suggest for your sector? (Note: use the improvements mentioned in the questionnaire as examples)
- 3. In your opinion, what makes an attractive funding mechanism?

# Section 5 – Further Comments

This section serves as an open question for any remarks the participant might want to include and which fall outside the previous questions.

Questions:

 Would you like to add any other comments outside the scope of the previous questions?



# Annex III – Interviewer and interviewed companies

The companies in the tables below were interviewed by some SMARTSPEND partners.

Partner who carried out the interview: ZABALA

Name of Participant	Guglielmo Cioni
Entity	TVP Solar
Nature of the entity	Business Company
	Energy Systems, Energy Efficiency Solutions for Buildings, Energy
Sector	Efficiency in Industry, Solar Thermal
Country	Italy

Name of Participant	Dr. Rainer Bacher
Entity	BACHER ENERGIE AG
Nature of the entity	Business Company
Sector	Energy Systems
Country	Switzerland

Name of Participant	Eva Sass Lauritsen
Entity	SEAS NVE
Nature of the entity	Business Company
Sector	Utilities
Country	Denmark

Name of Participant	Philippe Marchand
Entity	TOTAL
Nature of the entity	Business Company
Sector	Bioenergy and renewable fuels
Country	France



Partner who carried out the interview: FNR

Name of Participant	René Venendaal
Entity	BTG Biomass Technology Group BV
Nature of the entity	Business company
Sector	Bioenergy and renewable fuels
Country	The Netherlands

Name of Participant	Lars Waldheim
Entity	Waldheim Consulting
Nature of the entity	Consultancy
Sector	Energy systems, Bioenergy and renewable fuels
Country	Sweden

# Partner who carried out the interview: ECTP

Name of Participant	Karine Laffont-Eloire
Entity	DOWEL Management
Nature of the entity	Business company
	Smart cities, energy systems, energy efficiency solutions for buildings,
Sector	energy efficiency in industry
Country	France

## Partner who carried out the interview: WIP

Name of Participant	Elena Rico
Entity	ONYX SOLAR ENERGY SL
Nature of the entity	SME
Sector	BIPV
Country	SPAIN

Name of Participant	Julius Denafas
Entity	Soli Tek R&D, UAB
Nature of the entity	Business company
Sector	Photovoltaics
Country	Lithuania