



Minutes of 2nd workshop Public version

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Public Version



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1. Introduction

The organization of workshops with potential SPIN partners is one of steps needed to establish a SME Partnerships for Innovative Energy Services (SPIN).

Factor4 has been the principal in a Simple SPIN for some time. Associates in this Simple SPIN are individual experts or small companies specialized in one or more fields such as lighting and heating. The relationships are mainly bilateral between Factor 4 as the principal and each of its associates.

After a first workshop (see minutes of first workshop) a second workshop was organized with the same participants to discuss the creation of a Complicated SPIN (partnership) between Factor4 and two companies with complementary services starting with a concrete pilot.

Prior to the workshops several bilateral meetings took place with each of the potential partners.

To safeguard the competitive position of this SPIN and SPIN members the names of the participating companies and some other information are not disclosed in this report.

2. 1st workshop: About the EPC+ project, ESCO pilot project and market assessment

a) General information

Title of the event: Market assessment and concrete project opportunity

Organized by: Factor4

Date: 15/12/2015

Duration: 13:30 – 17:00

Location: Mechelen

Invited SPIN partners:

- Factor4 (facilitator and coordinator of EPC projects)
Contact person: Sven Wuyts, partner
- Not disclosed
Contact person: Not disclosed
- Not disclosed
Contact person: Not disclosed

b) Agenda

- Detailed analysis of business case for ESCO
- Roles of partners in the project
- Distribution of cost, benefits and risks

c) Questions to be answered

- **Value Proposition**

An Initial proposal has been provided to the potential client and discussed with him. Several corrections/adjustments have been made to the concept of the contract by Factor4. Adjustments have been discussed in detail and additional ideas for the new proposal have been proposed by the SPIN partners. The main issue is how to make the offer more attractive to the client. An updated proposal will be prepared by Factor4.

- **What are the final roles of each partner?**

Factor4 (facilitator and coordinator of EPC projects): coordinator, M&V

[Not disclosed]

[Not disclosed]

Several other external parties will be contracted by the main contractor for tasks other than [not disclosed].

- **Who is the first contact person?**

Factor4 will be the initial contact person for the client in the pilot projects.

- **Who is going to approach the client?**

Factor4 will approach the client for the pilot projects and coordinate the initial setup-phase (energy audit, proposal preparation, sales, contract setup and M&V).

- **Is there a common understanding on the SPIN contract?**

- Risk sharing: overview of the risks involved in the pilot projects has been made and discussed with the partners.
- Know-how sharing : agreement propositions have been made about the protection of know-how and customers. All partners will review and give feedback.
- Remuneration sharing: Sharing of remuneration will be done based on a simulation of the expected cash-flows. Factor4 has also prepared and presented a number of scenario's for further roll-out of the concept (3-10-30 projects with varying magnitude).

- **How can costs and invoices be dealt with? Delayed payments, partly payments, covering retentions?**

The basic concepts of the agreements between the partners have been discussed and agreed. The agreements include payments, risk sharing, margin and profit sharing, ...

Factor4 will elaborate a "back-to-back" contract to be used between the partners.

3. Annex: 2nd workshop

[Not disclosed]