# PROSPECT+

## Guidebook for the Upgraded Decision-Making Matrix

h2020prospect.eu

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# Preface

PROSPECT+, building on the previous H2020 project PROSPECT, will enable capacity building in regional and local authorities in order to finance and implement effective and efficient sustainable energy plans, including their proper monitoring and verification and also ensuring that such plans are using synergies from other local plans. The learning programme will advance through 5 learning modules covering public buildings, private buildings, public lighting, transport, and cross-sectoral topics. PROSPECT+ will focus on improving decision-making of cities in project selection for financing and assessment to ensure that their projects are finance ready. The ambition is to ensure that over 200 EU cities in at least 20 EU MS will improve their capacities when it comes to implementing projects from sustainable energy and climate plans (SECAPs) and similar sustainable plans.

# WHO WE ARE

| | Participant Name | Short Name | Country | Logo |
|---|---|---|---|---|
| 1 | Institute for European Energy and Climate Policy Stichting | IEECP | NL | |
| 2 | European Federation of Agencies and Regions for Energy and the Environment | FEDARENE | BE | |
| 3 | EUROCITIES ASBL | EUROCITIES | BE | |
| 4 | Energy Cities/Energie-cites Association | ENC | FR | |
| 5 | University of Piraeus Research Center | UPRC | GR | |
| 6 | OÖ Energiesparverband | ESV | AT | |
| 7 | Energy and Climate Agency of Podravje | ENERGAP | SI | |
| 8 | Tipperary Energy Agency | TEA | IE | |
| 9 | Ayuntamiento de Valladolid | INNOLID | ES | |
| 10 | Association of Energy Managers of Towns and Regions of the Czech Republic | SEMMO | CZ | |
| 11 | Adelphi research gemeinnützige GmbH | adelphi | DE | |

# Contents

# 1 Introduction to the Recommendation-Decision Matrix Tool for Selecting Financing Schemes

The PROSPECT Recommendation-Decision Matrix tool was developed during the H2020 PROSPECT project and was updated in the context of the H2020 PROSPECT+ project. The tool is designed to support local and regional governments on their first decision-making steps against a wide array of innovative schemes for financing their climate and sustainability actions across 5 different sectors:

- Public Buildings
- Private Buildings
- Public Lighting
- Transportation
- Cross-Sectoral

For each sector, there are specific innovative financing schemes that could be best adopted. The user should answer a specific set of questions by selecting one of the pre-determined answers provided. These questions represent the prerequisites for implementing each innovative financing scheme at local level.

The analysis does not necessarily identify an "optimal" financing solution, but it rather describes how and to what extent each option meets the aforementioned prerequisites. As such, it empowers users to draw conclusions, recognise and justify the choice of the most suitable financing scheme, by looking at the results, without dictating individual judgments.

The decision-making assessment is meant to be repeated over time alongside the early stages of city planning or projects' preparation process to reveal the best pathways toward the most suitable new financing solutions based on context-specific characteristics. It can also serve as a stand-alone capacity building resource enabling a concise overview of new and innovative financing instruments and an interpretation of their mechanisms and areas of application.

In this updated tool, a quick finance readiness check is included after the recommendation-decision matrix analysis. This optional part of the tool aims to provide a preliminary self-assessment analysis for the user to evaluate the financial maturity of their planned or ongoing project.

This document contains a comprehensive and all-inclusive guide to accompany the tool and to enable recurring and first-time users to better navigate the interface.

## 2 User Manual

### 2.1 Entering the tool

The Recommendation - Decision Matrix is a free online tool available at the following link https://rdmtool.teeslab.unipi.gr/. Once the user has clicked the link, they will be transferred to the registration page, as shown in **Figure 1.** From there, the user has the option to create a personal account to save their data, by using their email address. If they want to explore the tool without having any data stored, their email address is not needed. This can be achieved by clicking the green "**Proceed without an account**" button. On this page, the "*Forgot Password*" button is also available and allows users to easily reset their password. Lastly, the Privacy Policy can be accessed through this page. Before the user delves deeper into the tool, it is recommended to read the Privacy Policy containing disclosures related to data privacy and retention.
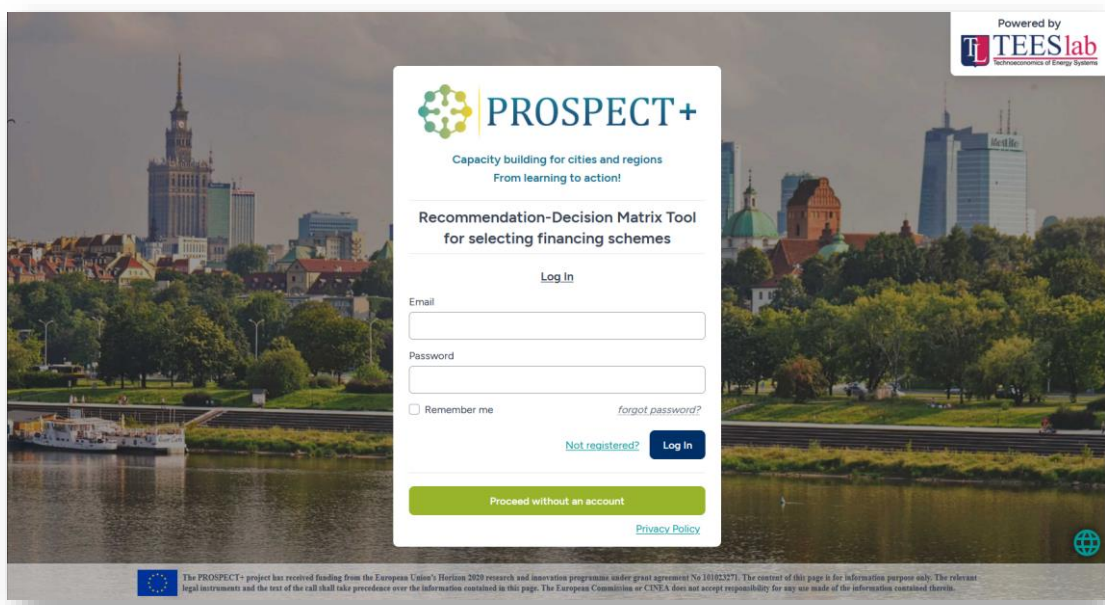


**Figure 1: The registration page**

### 2.1.1 Change language

Before continuing with creating an account or logging in to an existing one, the user has the option to navigate through the tool in another language[1]. To do so they can click on the small globe icon at the bottom right of the first page (**Figure 2**).

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[1] Note that the user can also change language at any time during the use of the tool.
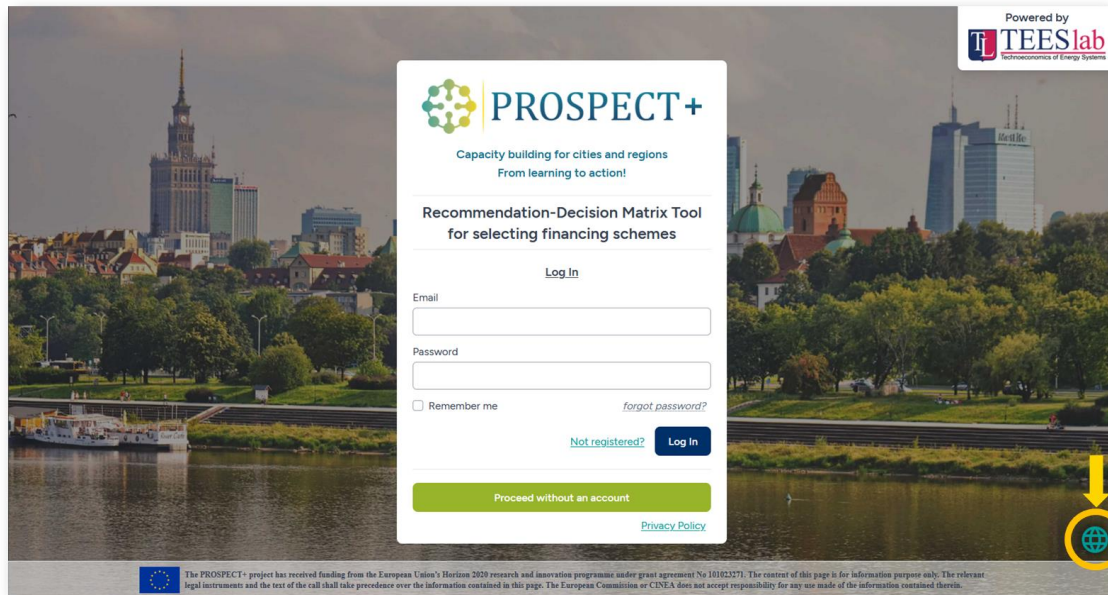
**Figure 2: The globe icon that allows users to access other languages**

After clicking the globe icon, a pop-up window appears (**Figure 3**) allowing users to choose among Greek, German, French, Italian, Polish, Portuguese, Spanish, Dutch, Croatian, Czech, Slovak, Slovenian and Irish[2] from the drop-down list available (**Figure 4**).
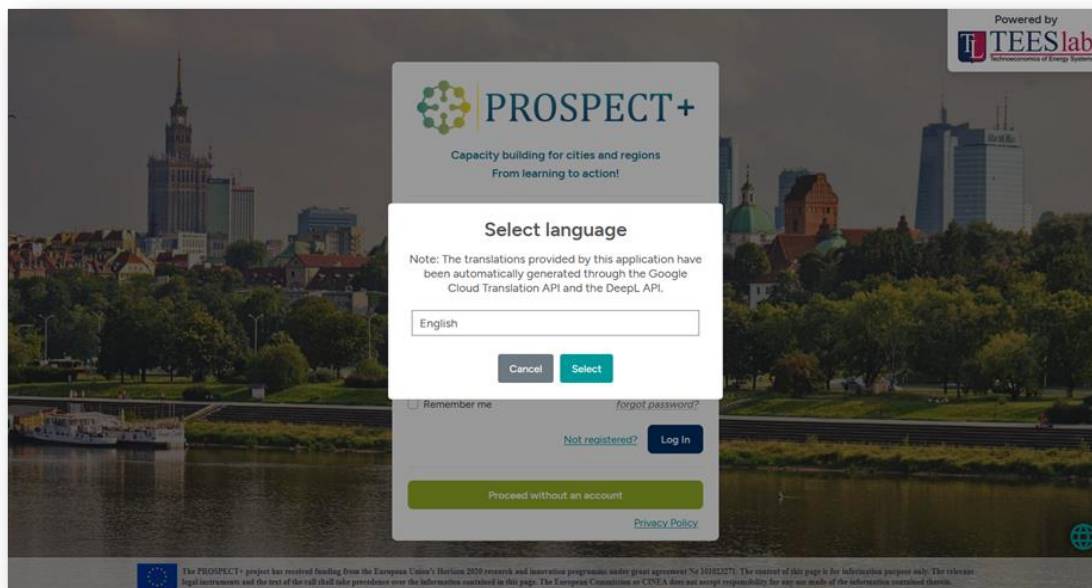


**Figure 3: The pop-up window for changing language**

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[2] All translations provided in the tool have been automatically generated through the Google Cloud Translation API and the DeepL API.
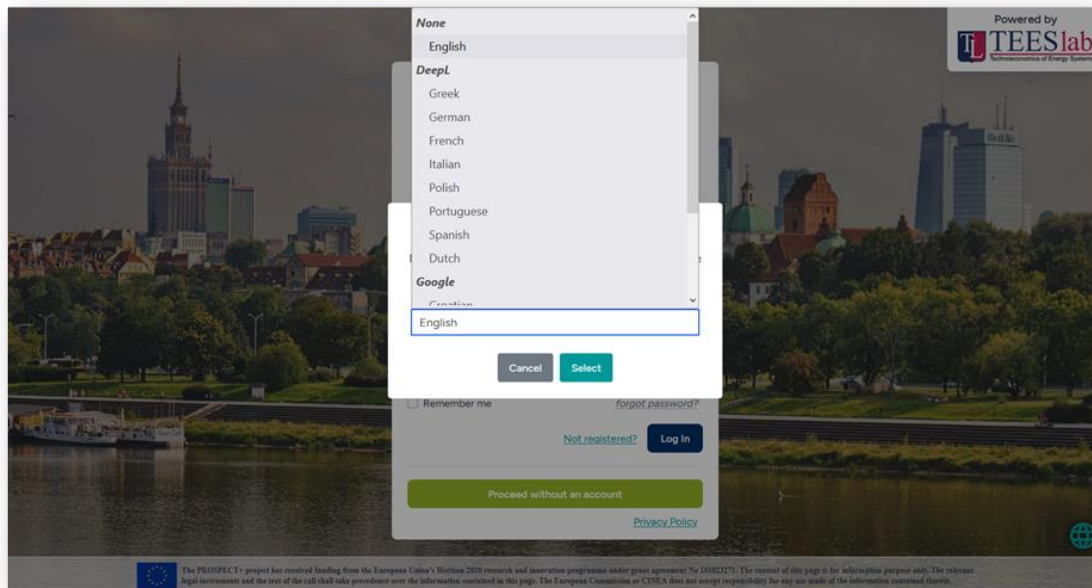
**Figure 4: The drop-down list for choosing among the available languages**

### 2.1.2 Creating or Logging in with an Account

If the user has used the tool before they can log in to their account by providing their **email** address and their **password**.

If the user is using the tool for the first time, they can click the "**not registered**" button (**Figure 5**) and be redirected to the registration page.
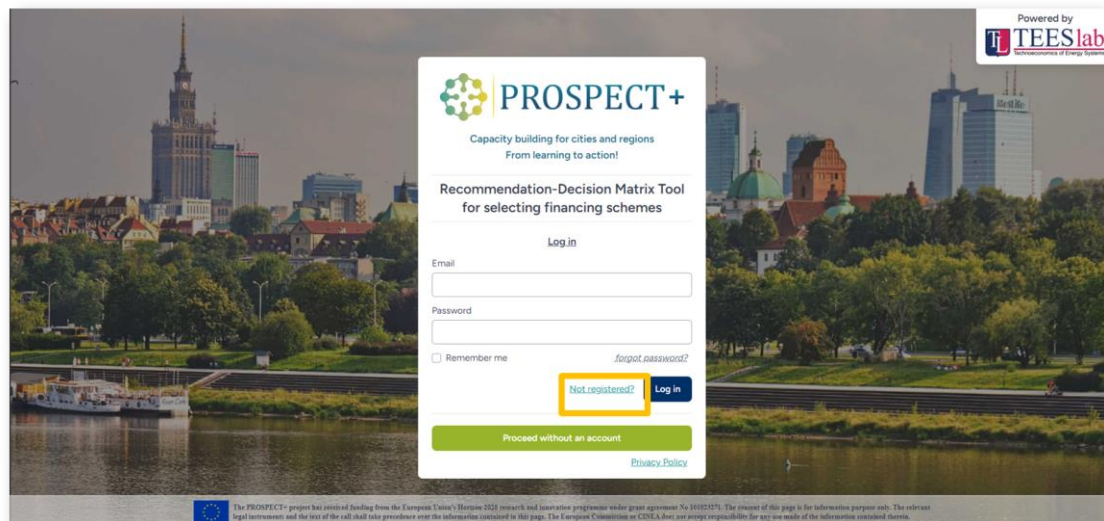


**Figure 5: The Registration Page for existing users**

In the new page, shown in **Figure 6**, the user can create an account by filling out the required information (name, email, and password[3]).

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[3] Note that the Password selected must be at least 8 characters long.

The user is free to **proceed without an account** by simply choosing the button available at every step of the registration process.
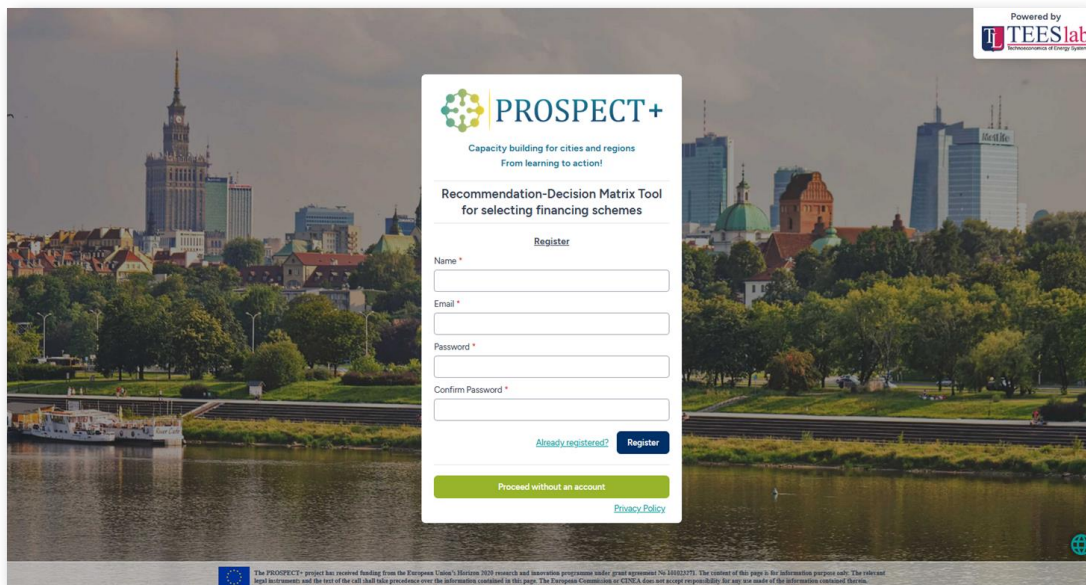


**Figure 6: The Registration Page for first-time users**

### 2.1.3    The User Profile

When the user is registered, they have their individual account, from where they can access their analyses and results or edit their profile at any time (**Figure 7**). The options "Home" and "Help & Support" are also available to nonregistered users.
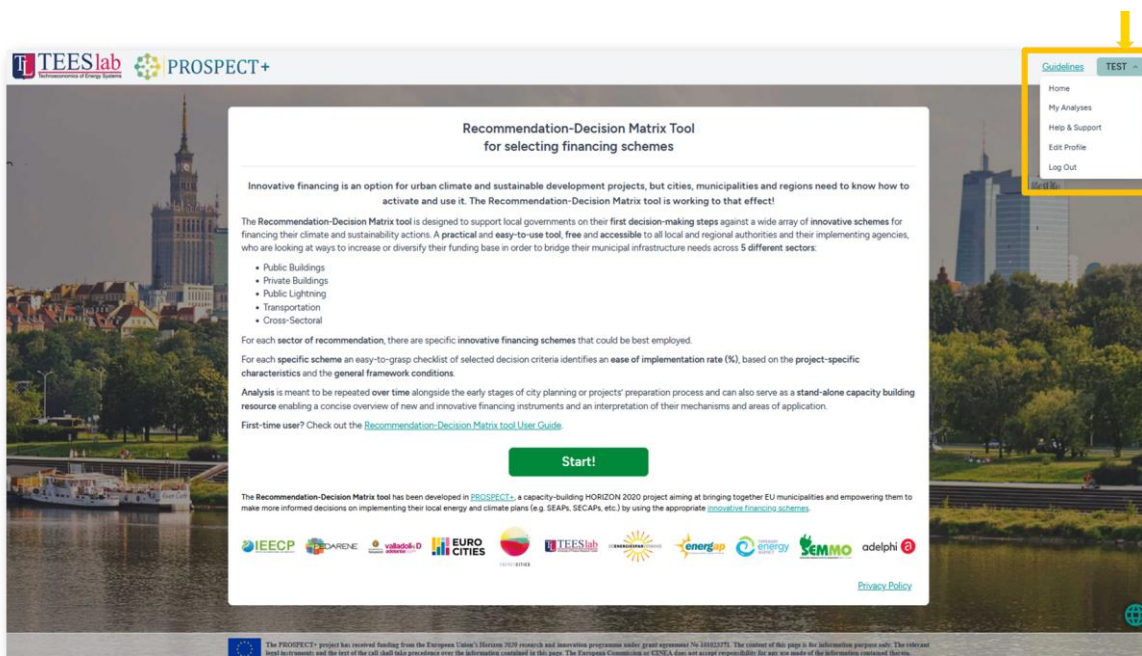


**Figure 7:The registered user's Recommendation-Decision Matrix Tool Home page**

### 2.1.3.1　　My Analyses library

Once the user clicks on "**My Analyses**" in the menu button, they can access all the analyses conducted with their account as shown in **Figure 8.** From there they can delete or edit each one of the analyses or view the results. By clicking on the yellow "**Create new analysis**" button, they can start a new analysis, following the steps described in the next section (Section 2.2).
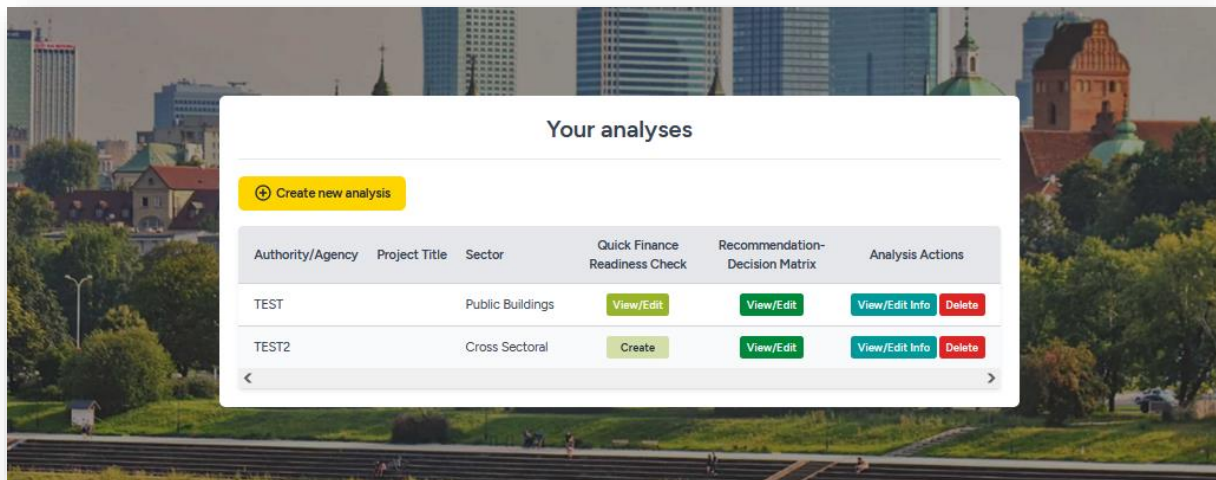


**Figure 8: My Analyses Library**

### 2.1.3.2　　Edit Profile Section

If the user wishes to edit the information entered into their profile, they can do so by clicking "**Edit Profile**" on the menu (**Figure 9**)
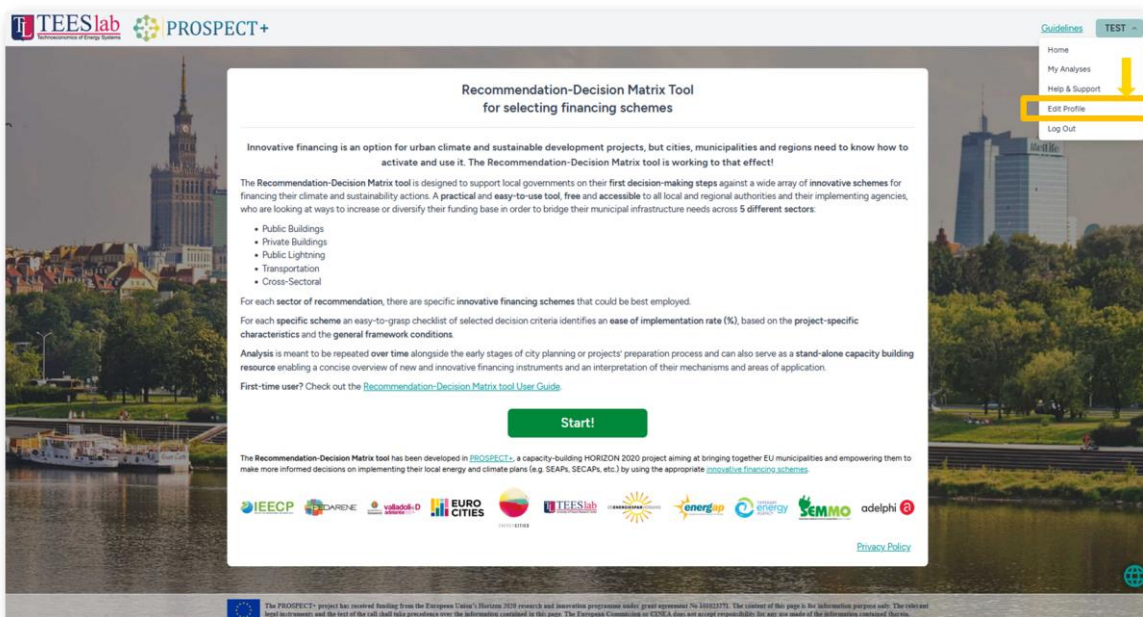


**Figure 9: Edit Profile option on the menu list**

From there, they will be directed to the page shown in **Figure 10**, where they can edit their name, email, or change their password.
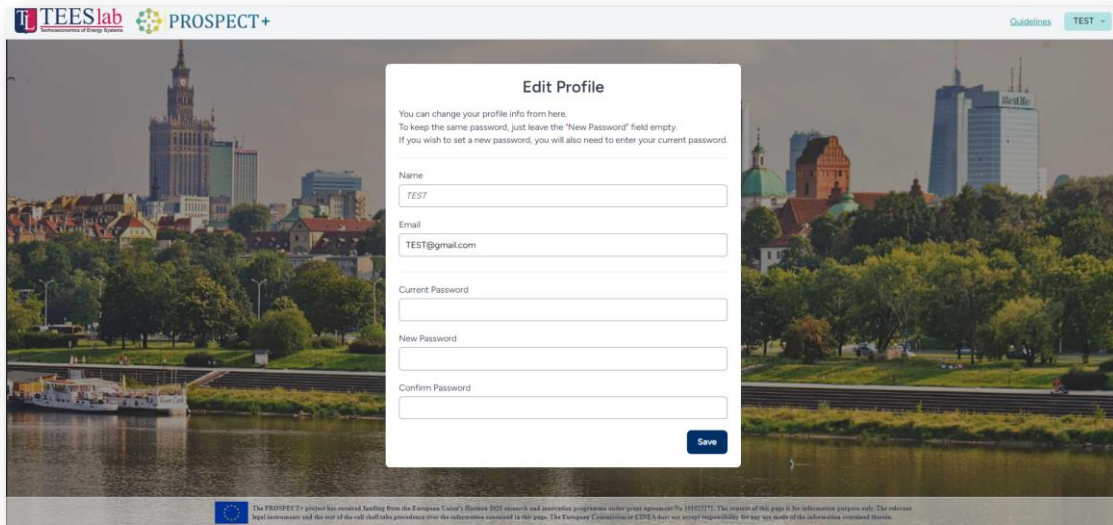
**Figure 10: The Edit Profile Page**

### 2.1.3.3 Help & Support

The user can access the current user guide and find contact details through the help and support window available through the menu.
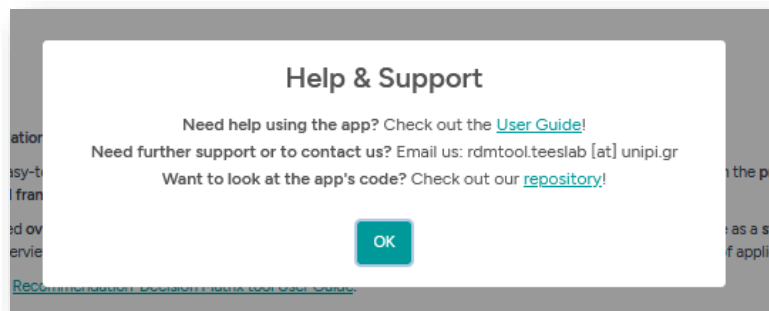


**Figure 11: Help and Support window**

## 2.2    The Home Page

The home page of the tool is shown in **Figure 12** and is described in detail below.

Starting from the top left corner of the page, the user can access the links for the webpage of the H2020 PROSPECT+ project, and the webpage of the TEESlab (UPRC), lead beneficiary of this deliverable, while links for all the project partners are available in the lower part of the page. When the user accesses the tool without an account (guest mode), a pop-up message informs them that they should log in if they wish to save their analyses (**Figure 12**). In guest mode, the analyses conducted **cannot be saved.**
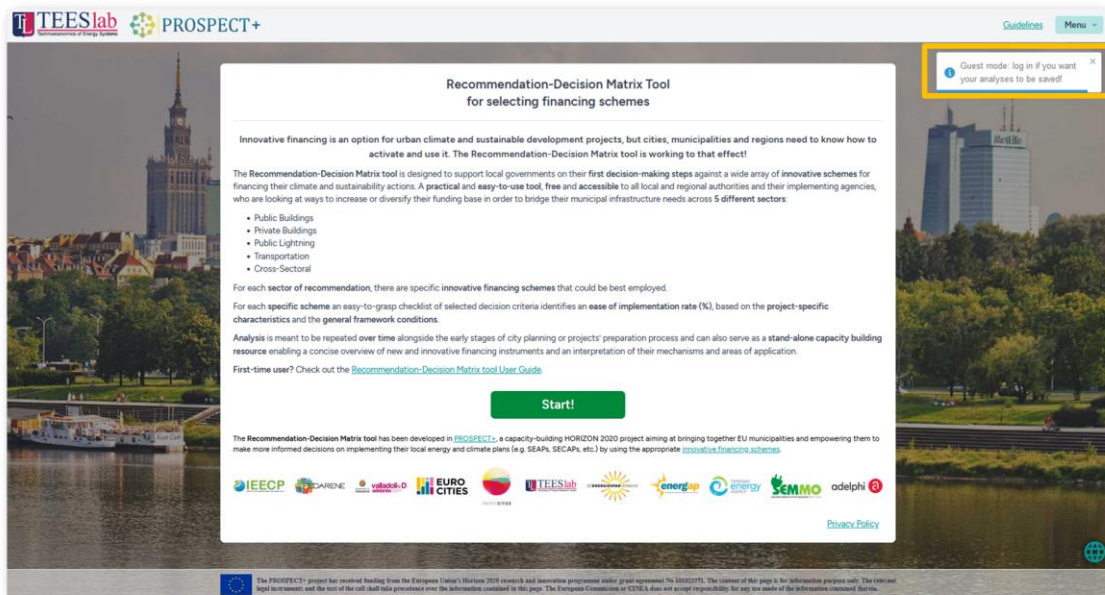


**Figure 12: The Guest Mode Warning Sign**

## 2.3    The Recommendation-Decision Matrix Tool

Whether the user has created an account or is continuing in the guest mode, they can proceed to the analysis by clicking "**Start**" at the home page.

### 2.3.1    Your analysis details (for logged-in users)

When clicking the "**Start**" button the process starts and the user will have to fill out the **General Information and Project Description** for their intended analysis by providing the information required (Name of Authority or Agency , City-Region name, Country name, project title, Sector, etc.) (**Figure 13**)**.** A red asterisk indicates the mandatory information. Once the data has been provided, the user can click the "**Next**" button and be directed to the next page.

Note that this page is available only to the logged-in users. If an account is not used, after clicking the "**Start**" button, the visitor will be directed to the page presented in the next paragraph.
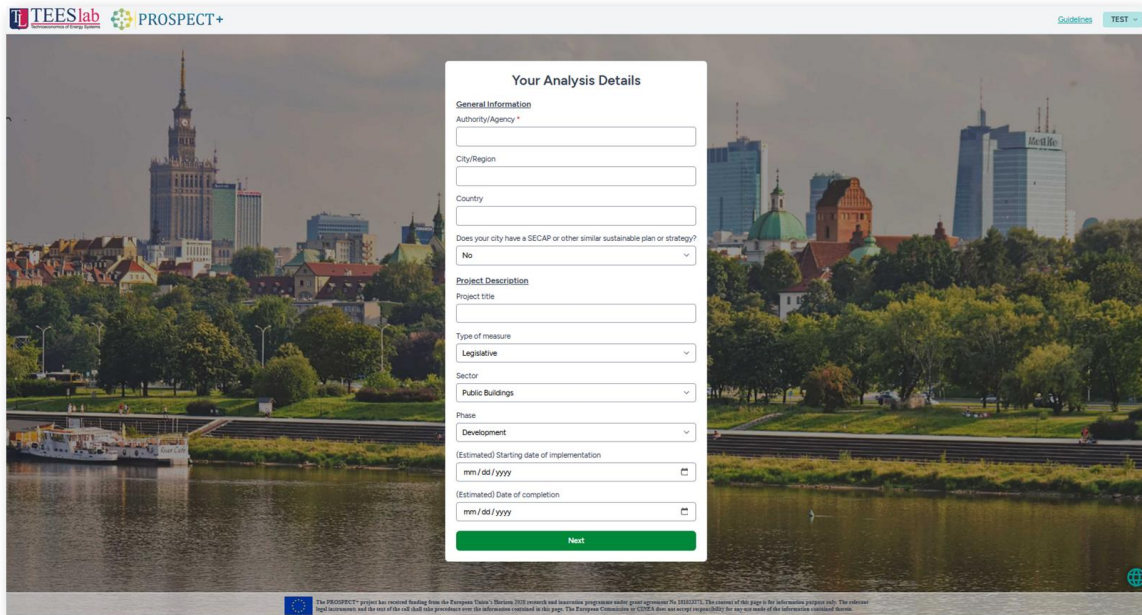
**Figure 13: The General Information Page**

### 2.3.2 Sector of Recommendation

In this page, the user will have to choose the **Sector of Recommendation** (i.e., Public Buildings, Public Lighting, Private Buildings or Cross-sectoral) (**Figure 14**). For the purpose of explaining the tool, we will proceed with the "**Cross-sectoral**" sector as an example.
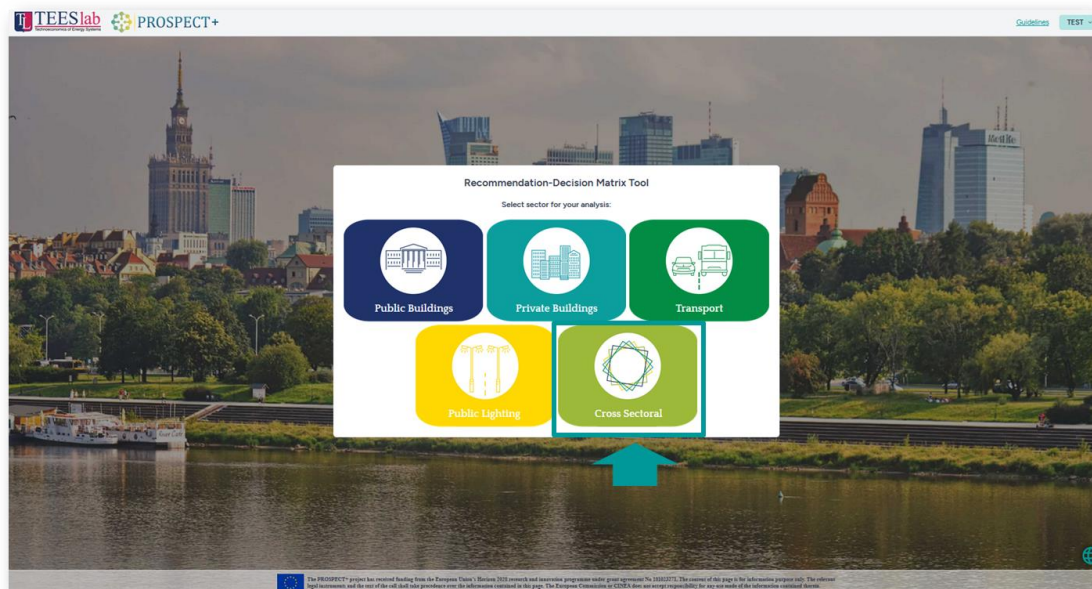


**Figure 14: The Recommendation Sector Selection page**

### 2.3.3     The Questionnaire

Once a sector has been chosen the user will be asked to answer a series of mandatory questions (31 in total) regarding the project under consideration, by choosing between **YES, NO, or Partially** (**Figure 15**). When the questionnaire is completed, the user can view the results of the analysis by clicking the "**Show results**" button at the end of the page.
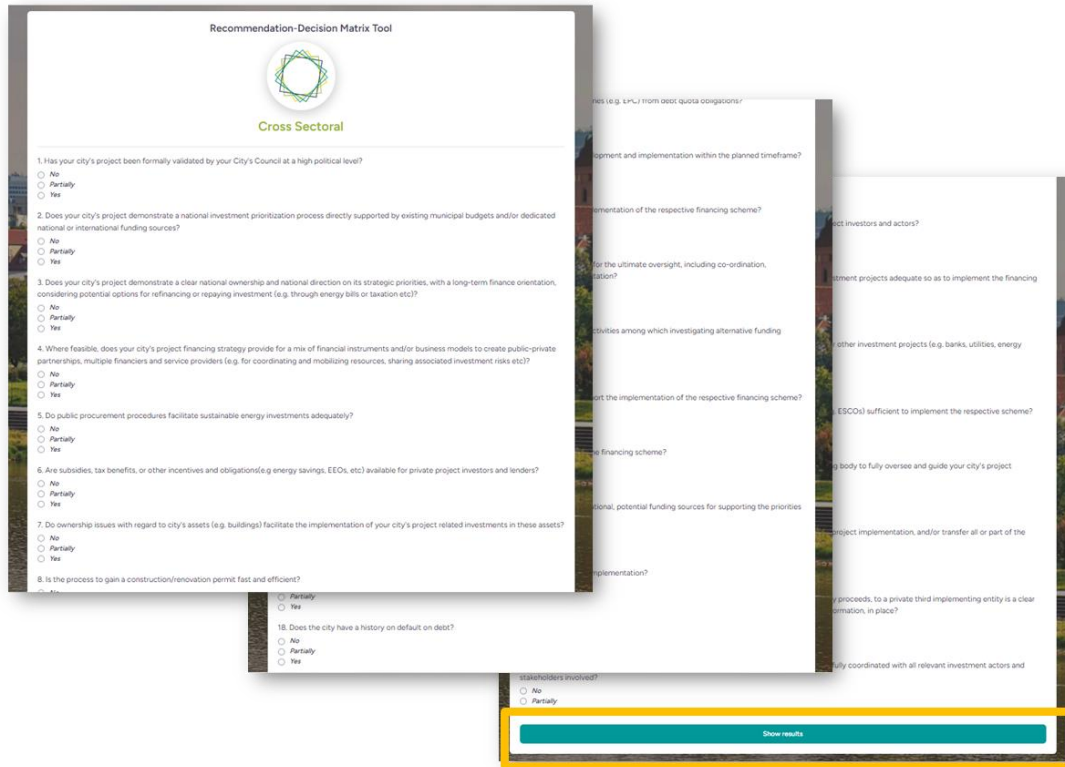


**Figure 15: The Questions concerning the Cross-sectoral Sector**

### 2.3.4     The Recommendation-Decision Matrix Results

Directly below the "**Show results**" button, the user can find the results of the analysis. The results are automatically determined according to the answers the user has provided, indicating an ease of implementation rate (%) for each available financing scheme against the general framework conditions (**Figure 16**). The analysis is automatically saved in the user's "**My analyses**" library, as long as they are logged in with an account. The graph can also be downloaded in PNG format by clicking on the "**Download results**" button.

The user can begin a new analysis by clicking the dedicated button, ("**Start a new analysis**") or they can continue with the Quick Finance Readiness Check using the corresponding option.

**Figure 16: Recommendation-Decision Matrix Results Page**

## 2.4      The Quick Finance Readiness Check

At the end of the assessment presented above users can select to conduct a preliminary self-assessment to evaluate the financial maturity of their planned or ongoing project, by clicking on "**Continue to the Quick Finance Readiness Check**". This step is optional but recommended. From there they will be asked to answer a brief list of 13 mandatory questions regarding their project, by choosing a **YES or NO** answer. (**Figure 17**)



**Figure 17: Questions concerning the Quick Finance Readiness Check**

Once the questionnaire is completed the user can access the results of the Quick Finance Readiness analysis by clicking on the "**Show Results**" button. Similar to the Recommendation-Decision Matrix analysis, results are automatically saved and stored in the user's "**My analyses**" library (for logged-in users). They can also be downloaded in a PNG format when clicking on the relevant button (**Figure 18**).
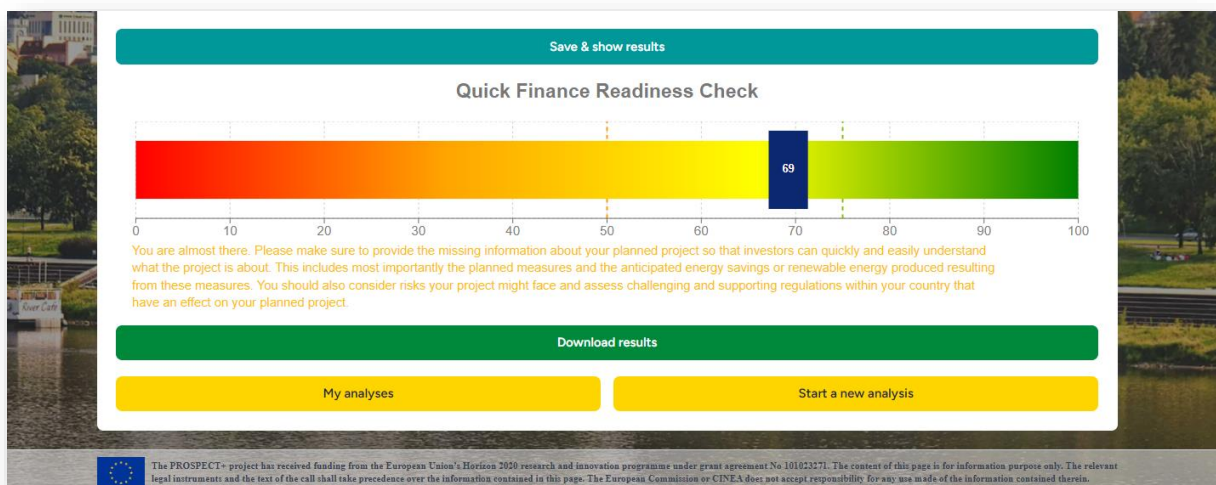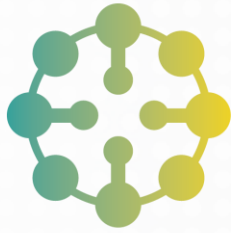


**Figure 18: The Financial Readiness Analysis Results**

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