D3.1

Call for applications – External Guidelines

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More information on the project can be found at: https://www.low2highdh.eu/

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List of Acronyms and Abbreviations

Abbreviation	Definition
L2H	Low2HighDH
GA	Grant Agreement
CA	Consortium Agreement
EC	European Commission
WP	Work Package
DH	District Heating

0. Executive Summary

Low2HighDH aims to support district heating operators in Lithuania, Poland, and Slovakia by integrating low-grade and waste heat technologies into their systems, aiding them in meeting their decarbonisation goals. To achieve this, the project requires active engagement from high-temperature district heating sites and will evaluate prospective participants through a Call for Applications.

This document's objective is to provide comprehensive information necessary for applicants to participate in the Call for Applications. It covers the overall context of the Low2HighDH project, details each step of the application process, and outlines the framework for finalising the collaboration agreement. This ensures that all potential participants are well-informed about the project's goals, the support available, and the expectations for both parties involved in this initiative.

The document has been divided into three main sections:

- A brief overview of the Low2HighDH project and the role of the support facility within the project framework
- A detailed description of the call for applications including the application process, the main criteria and the selection methodology
- A definition of how the support facility will be established through the collaboration agreement set up

Even though all sections are essential, the content is mainly focused on the application process itself, which has also been split into three main steps depicted in Figure 1.

Figure 1 - Steps to be followed by the applicant during the application procedure

The application will be carried out by completing an online application form which will gather all relevant information to be used to score candidates. Then the consortium will use the selection criteria, also described in this document, to select the most appropriate applicants. Last, the selected applicants will be contacted by the consortium partner in charge of providing the specific support in order to define the support facility and formalise the collaboration agreement.

To ease the applicant's user journey, an annex contains a step-by-step walkthrough of the application form.

Additionally, a Helpdesk has been created to communicate with applicants so they can voice their doubts or provide further information. This has been made accessible via an email address (contact@low2highdh.eu) to which applicants, or other interested parties, can direct their comments immediately.

1. Introduction

Low2HighDH is a 3-year project supporting 30 high-temperature district heating sites (HT DHC) in Lithuania, Poland, and Slovakia in the implementation process of low-grade or waste heat technologies. The project aims to promote the advantages of these energy sources and provide an investment plan to meet the criteria for 'efficient district heating and cooling' from the Energy Efficiency Directive within a 10-year timeframe. The support to HT DHC sites includes launching and managing at least two requests for proposals (RFQs) to select key suppliers for the implementation. Low-grade RES technologies to be explored will consist of at least solar thermal, low-temperature geothermal, and heat pumps. Heat pumps, being the enabling technology, can use renewable electricity from wind and photovoltaics to harness low-grade heat sources and use waste heat. The project will generate and disseminate capacity-building materials for other HT DHC sites or stakeholders, including a portfolio of technical and financial solutions for the most common situations. An active engagement, dissemination, and replication phase will be facilitated by creating a vast network of stakeholders across the three case study countries and beyond. This network will include three national stakeholder communities, 30 local liaison groups, and a project-wide Ambassador community. The project is expected to trigger EUR 454 million in investments in sustainable energy (thermal RES technologies + waste heat), replace 1 TWh/year of fossil fuels, and abate 291 thousand tons of CO_2.

2. L2H project

The District Heating (DH) market in Europe has been extensively researched, revealing that DH is prominent in colder climate countries, especially in Lithuania, Slovakia, and Poland, where it serves a significant portion of the residential sector. However, most DH facilities in these countries still rely heavily on fossil fuels. Low2HighDH aims to address this by integrating renewable energy sources (RES) into DH systems, with heat pumps being a key technology. These pumps can increase the temperature of low-grade heat sources to higher levels, supporting energy efficiency and sector coupling. Heat pumps' efficiency is measured by the coefficient of performance (COP), which is higher when the source temperature is higher. Low2HighDH will explore technical solutions for integrating RES and waste heat into DH systems and develop a portfolio of solutions to facilitate these integrations.

Financially, the European Commission and various private funds provide resources for green energy transitions. Low2HighDH will help connect financiers with DH projects, creating tailored investment plans. The project aims to support 30 high-temperature DH sites in Poland, Slovakia, and Lithuania, promoting RES and waste heat technologies to meet the Energy Efficiency Directive's criteria within 10 years.

2.1 Methodology

The L2H methodology is designed to ensure the successful integration of low-grade energy sources into high-temperature district heating networks.

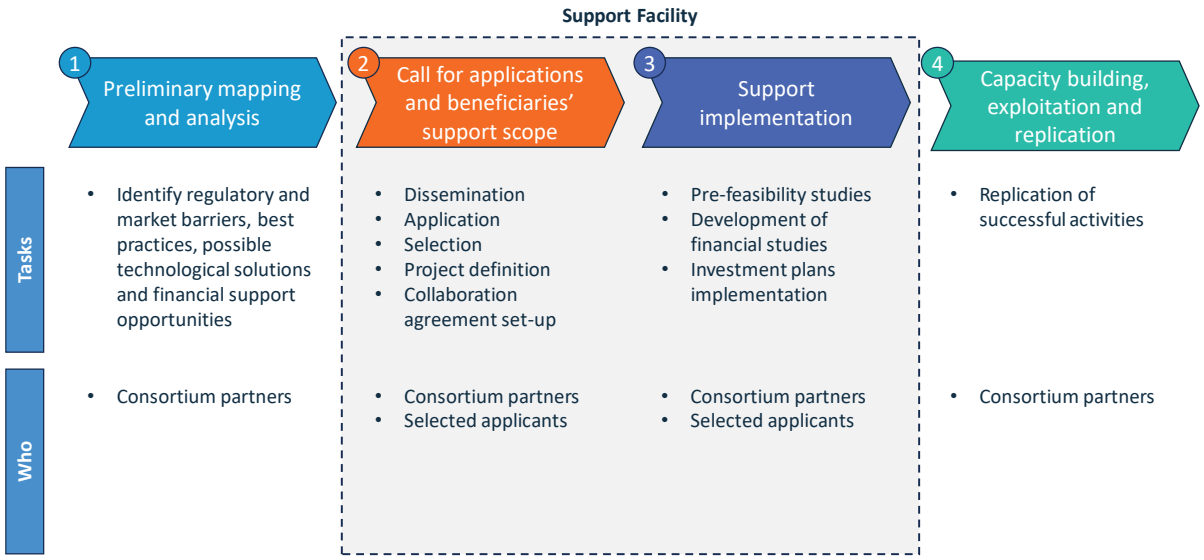


Figure 2 - Low2HighDH Methodology

The project will follow a 4-step methodology, going through the following 4 stages:

1. **Preliminary mapping and analysis**
   Only consortium partners are involved in this initial stage. The team will identify regulatory and market barriers, best practices, possible technological solutions, and financial support opportunities. This foundational stage ensures a tailored approach to each target country and district heating network.
2. **Call for applications and beneficiaries' support scope**
   This stage will mark the beginning of direct engagement with potential project beneficiaries. Specific district heating networks that will receive support will be identified, and a detailed scope of support will be outlined. A call for applications will be launched to select suitable district heating operators. The criteria and process for application will be designed to identify participants who can most benefit from and contribute to the project's goals. This stage will set the parameters for the types of technical and financial assistance that will be provided, ensuring that the support aligns with the needs of each selected site.
   The first call for applications is scheduled for month 9, with a second call planned for month 21. Following the call for applications, the selection process will continue with the management of incoming applications, and the scoring and ranking of these applications based on predefined criteria. This process will span three months, followed by an up-to-one-month period for final selection. The selection process will be conducted transparently, and if necessary, the period can be prolonged by a decision of the project consortium.
3. **Support Implementation**
   During this phase, the project's support facility will come into full effect, where consortium partners will collaborate closely with the selected district heating operators. This is where the case studies will be developed, following the workflow later explained in Section 4 and Figure 5. The support provided includes pre-feasibility studies, development of financial studies, and assistance with the implementation of investment plans.

a. Pre-feasibility studies: Comprehensive assessments, supported by data collection, will be conducted to determine the viability of integrating low-grade or waste heat technologies into existing high temperature district heating systems.
b. Development of financial studies: Financial analyses, supported by data collection, will be performed to establish viable investment plans. This includes identifying potential sources of financing and creating tailored financial solutions for each project.
c. Investment plans implementation: Support in executing the investment plans, ensuring that the necessary resources, technologies, and processes are effectively deployed.

The Call for Applications and Support Implementation phases are central to this deliverable and will be further developed in the next sections.

4. **Capacity Building, Exploitation and Replication**
   In this final stage, only consortium partners will be involved. The focus is on ensuring the implementation of beneficiaries' investment plans after the support period and promoting the replication of successful activities by other district heating operators. This involves extensive capacity building and dissemination of best practices and lessons learned.

3. CALL FOR APPLICATIONS AND BENEFICIARIES' SUPPORT SCOPE

To participate in the Low2HighDH support facility, applicants must follow a structured application procedure. This chapter provides an overview of all relevant information related to this process, starting with the overall application procedure and covering the necessary phases for a successful application.

The application process encompasses all necessary interactions between the Low2HighDH consortium and the applicants, from project dissemination to the formalisation of the collaboration agreement. The process aims to evaluate applicants' ability to self-implement the Low2HighDH methodology and determine the required level of expert support. The procedure comprises five distinct phases:

1. **Communication Phase**
2. **Application Phase**
3. **Selection Phase**
4. **Project definition Phase**
5. **Collaboration agreement set-up**

3.1.1 Communication Phase

The communication phase aims to broadcast all the necessary information about the Call for Applications and make additional relevant content available to reach the highest number of applicants possible. This phase promotes the project through various platforms, including:

- Events: Presentations at events related to District Heating and Cooling (DHC) networks and the decarbonization of the heating and cooling (H&C) sector.
- Informing DH national associations through the Local Partners of the project.
- Project Media Channels: Website, LinkedIn, X, etc.

- Webinars and Info Sessions[1]: Detailed sessions explaining relevant aspects of the project, such as goals, methodology, and expected support.

Existing materials, as well as future events and conferences, can be found on the project's website. The Low2HighDH consortium members are responsible for developing the communication structure, ensuring it covers the project's geographical focus. A helpdesk will be developed to allow applicants to request additional information by emailing contact@low2highdh.eu.

Communication and dissemination will be an ongoing task throughout the project to encourage applicants to apply for support based on the available resources.

3.1.2 Application phase

Once potential applicants have gained interest in the project and understood how the offered support activities can meet their specific needs, the next step is the Application Phase. This phase involves submitting a regular application where applicants provided detailed information about their case study, including answering detailed questions to characterise the support.

The main aim of the application is to gather all the necessary information for characterising and scoring the applicants. This will be done using an online application form, available on EU Survey accessible directly and via the project website.

The different parts of the form will be explained below, while a detailed step-by-step walkthrough using pictures of possible outcomes depending on the applicant's answers can be found in the annex to this document. The helpdesk described in the previous section could also be used to provide ad hoc support to applicants throughout the application procedure.

3.1.2.1. Part A – Administrative information

The first part to be filled out in the application form is the administrative information, which aims to gather general information on the applicant organisation, as well as contact information to enable swift communication between the consortium and the applicant. All the fields in this section are compulsory, except for the alternative contact information, which is optional. Examples of the information that applicants could be asked to provide are:

- For the organisation
  - Country
  - Address
  - Type of organisation
  - Language
- For the main contact
  - Name
  - Position
  - Email
  - Phone number

[1] The detailed schedule for the webinars and info sessions will be available on the project website. Please check the website regularly for updates and specific dates.

3.1.2.1. Part B – Support facility questionnaire

The support facility questionnaire is a critical component of the application process for the project. It gathers essential information to evaluate and tailor the support provided to each district heating site.

This part of the form is a questionnaire divided into sections to systematically collect information from the applicants. This information is used to characterise and rank the applications, ensuring that the support provided is effectively tailored to each site.

Further details will be explained in the next chapter, where a list of the selection criteria will also be provided.

3.1.3 Selection phase

The Selection Phase of the Low2HighDH project is designed to evaluate the submitted applications, select participants for support, and define the support offered based on predefined criteria. This phase ensures that the most suitable projects are chosen and that the support provided is effectively tailored to their specific needs.

3.1.3.1 Selection criteria

This chapter aims to provide an overview of the selection criteria used to assess and rank applications, as well as a short description which helps the applicant to better understand them.

The selection criteria have been carefully designed to evaluate applications on various essential aspects that reflect their potential to benefit from and contribute to the project's goals. These criteria are divided into two main categories:

Knock-out criteria are essential requirements that all applicants must meet to be considered for further evaluation. These criteria serve as preliminary filters to ensure that only qualified applicants are assessed during the evaluative criteria.

KO criteria	
Availability of free ground next to the DH system or distance from possible waste heat sources	Considers if the DH has available space (ground or roof) or the proximity of the DH system to potential waste heat sources. Distances are evaluated to assess the feasibility of integrating waste heat.
Availability of technical and economic data	Having enough data available is key to trigger the process. This data should be easily accessible (digital format).
Availability of qualified personnel	Having the required staff to support the project is essential to make the project a success. Important to know if they speak English, they have RES implementation knowledge and financial knowledge.

Figure 3 - KO criteria

Once applicants have passed the Knock-Out stage, they are assessed based on more detailed Evaluative Criteria, which are designed to rank the applicants based on the ease of implementation, and technical, financial and regulatory aspects.

Evaluative criteria	
Ease of implementation	
Ownership of the DH system	Evaluates the type of ownership of the district heating (DH) system. Ownership types such as private, public, or public-private partnerships are considered. This helps in understanding the governance structure and potential decision-making processes, which can impact the implementation and sustainability of the project.
Motivation for installing RES technologies	Assesses the primary motivation for installing renewable energy sources (RES) technologies. This includes motivations such as reducing CO_2 emissions, cost savings, regulatory compliance, and other potential reasons. Understanding the motivation behind adopting RES technologies provides insight into the applicant's priorities and alignment with project goals.
Existing plans for DH system improvement	Looks at the current state of plans for improving or upgrading the DH system. This helps in assessing the readiness and strategic vision of the applicant for future development
Room availability for new equipment	Evaluates the availability of space within the heat source building for installing new equipment (e.g. heat pumps). Knowing the available space is essential for determining the feasibility of integrating new technologies
Technical criteria	
Working temperatures	Examines the operating temperatures of the DH system. Different temperature ranges are considered to evaluate the system's efficiency and suitability. This helps in identifying the current efficiency levels and the potential for integrating advanced technologies that may require specific temperature conditions.
Working pressures	Looks at the pressure levels within the DH system. Various pressure levels (to be defined) are evaluated for system performance and safety.
Current heat technology used	Assesses the current state of the heat technology in use. Evaluating the existing heat technology provides a baseline for planning upgrades and improvements that align with the project's objectives.
Fuel mix of DH system	Looks at the type of fuel and the percentages. This helps in understanding the current energy mix and identifying opportunities for transitioning to more sustainable fuel sources.
Financial criteria	
Available financial resources	Assesses the amount of financial resources available for investment. This criterion looks at the financial capacity of the applicant to support the project, indicating their ability to fund a potential investment.
Annual revenues over the last 3 years	Looks at the annual revenues generated over the last three years. This helps in understanding the economic evolution of the applicant, which is important to build an attractive investment case.
Average annual cash generation	Evaluates the average annual cash generation. This metric provides insight into the capacity of the applicant to repay the investment.
Regulatory criteria	

Availability of subsidies or financial support	This could be crucial to build an attractive investment case.

Figure 4 - Evaluative criteria

3.1.3.2 Final selection

The final selection process ensures that the most suitable applications are chosen for support. This phase involves an evaluation and decision-making process to determine the participants who will receive support. The process is designed to be thorough, transparent, and fair, ensuring that the selected projects align with the project's objectives and have the highest potential for successful implementation.

The information provided by applicants in their responses to the selection criteria is used to score each application comprehensively. Following this, applications are ranked according to their comprehensive scores, with higher scores indicating a better alignment with the project's objectives and a higher potential for successful implementation.

Once the initial scoring and ranking are completed, the Low2HighDH consortium reviews the results. This review ensures that the scoring process was applied consistently and fairly across all applications. During this review, the Consortium discusses the proposed ranking and makes any necessary adjustments to ensure that the most suitable applications are accurately identified.

After the Consortium's review, a list of applications deemed suitable for support is created. The selected applications are then contacted to communicate their acceptance into the project and feedback is provided to all applicants to explain the outcomes of the selection process. This ensures transparency and provides valuable insights to applicants for future improvement.

3.1.3.3 Support categories

Based on the evaluation, applicants will be divided into two categories: those receiving full support (pilots) and those receiving lighter support (20 DH operators).

The 10 selected DH operators (pilots) receiving full support will benefit from a comprehensive package that includes:

- **Support scope definition**
    - Understand local context.
    - Identify stakeholders.
    - Identify required data and obtainability.
    - Assess technical expertise of applicants and define support needs.
    - Match needs with consortium capabilities.
    - Propose tailored technical solutions.
    - Explain expected outcomes.
- **Stakeholder community**

- Support participants in developing management and support team and processes.
- Create National Stakeholder Communities (NSC) in each target country.
- Create Local Liaison Group (LLG) in each town.
- Organise events and workshops to facilitate community formation and networking.

- **Prefeasibility studies**
  - Ensure participants understand the tool.
  - Help define all relevant parameters in detail.
  - Perform the modelling and optimisation phase.
  - Receive data support through bilateral meetings.
- **Financial plans**
  - Base financial planning on economic parameters from THERMOS/other tools.
  - Estimate main cash flow items: CAPEX, OPEX, and revenues.
  - Identify suitable financing suppliers.
  - Explore and select financing sources aligning with the project's risk profile.
  - Assess legal feasibility and tax structure of the investment plan.
- **Investment plans initiation**
  - Support and set up the local project deployment team.
  - Organise competitive bidding processes (RFQs) to secure EPC and financing suppliers.
  - Create detailed project descriptions for RFQs (scope, objectives, requirements, outcomes).
  - Collaborate with LLG to analyse bids and select suppliers.

The 20 DH operators (replicants) receiving lighter support will have access to a range of resources and opportunities designed to facilitate their own implementation efforts. This includes:

- **Case study definition guide**: Based on the knowledge and experience acquired from the pilot cases, a guide will be generated to help participants define their case study based on their local context. This guide will provide detailed instructions and practical examples for evaluating the local context, identifying key stakeholders, assessing technical barriers and opportunities, and gathering the necessary data for analysis. This way, replicants will be able to adapt the lessons learned and best practices from the pilot cases to their own circumstances, facilitating the planning and execution of successful projects.
- **Stakeholder community**: Replicants will have access to the contacts of both NSCs and LLGs, enabling them to benefit from a broad range of knowledge and expertise. They will also be invited

to participate in the organized events and workshops. This will allow them to engage with established stakeholders, share insights, and benefit from the collective expertise within the community.

- **Thermos or other tools**: Based on the knowledge and experience gained from the pilot cases, replicants will be provided with a comprehensive guide to set up their case studies on the THERMOS or other tool. This guide will include detailed instructions and practical examples, ensuring that replicants can effectively utilize the tool to develop their prefeasibility studies.
- **List of financing suppliers:** Replicants will have access to a list of possible financing suppliers. This list will include details about various financing sources, helping replicants identify the best options for their specific projects.
- **Investment plan initiation guide**: Detailed instructions on preparing RFQs, selecting suppliers, and initiating implementation steps. Additionally, replicants will have access to a list of potential financing suppliers and templates for RFQ documents to streamline the process.
- **List of feasible technologies**: Access to lists of available technologies suitable to different situations, including a short description.
- **Optional meetings with Low2HighDH Team**: Meetings with the Low2HighDH team to provide guidance and address any challenges faced by the replicant DH operators.

3.1.4 Project definition

The next phase of the selection process will be to describe the project with a level of detail that allows both the Low2HighDH consortium and the applicant to evaluate and identify the resources needed to complete the required tasks.

Once the applicant has been notified about the acceptance of its proposal, the responsible partner/assigned supporter will start the discussions about the definition of the collaboration agreement, which contents are described in Annex B.

Also, in case there are any confidentiality issues, a **Non-Disclosure Agreement (NDA)** or Data Sharing Agreement will be signed between the participant and the Low2HighDH consortium.

To aid in the definition of the support facility, the consortium will organise one or several sessions for partners and participants to better understand the support activities offered and discuss the scope and main features. These meetings could eventually be structured as follows:

- **Bilateral ramp-up sessions** between participants and their designated Support Partner will be carried out to gather more specific information about the envisioned support activity. This will help to define the collaboration agreement in the most beneficial way for partner and participant and to set up the next steps.
- In order to formalise this commitment, the **collaboration agreement** specifying this information will be defined and agreed upon by both the Support Partner and the participant. This document

will be considered a Memorandum of Understanding (MoU) and act as an overall framework to which both the Low2High consortium and the participant can refer to.

Following this, and prior to commencement of support, a collaboration agreement will be set up according to the procedure described in the following chapter.

3.1.5 Collaboration agreement set up

Once the applicant selection process has been completed, the consortium will designate a partner for providing the support, who will contact each of the selected participants to hold bilateral meetings to agree on significant aspects of the support project. These aspects include the scope, objectives, necessary inputs, expected outputs, and the timeline for project implementation.

The scope of the project will need to be defined in the collaboration agreement. This agreement outlines the terms and conditions of the collaboration, ensuring mutual understanding and commitment to the project's objectives. However, this agreement has been planned to be non-binding, providing a framework for cooperation without imposing legal obligations on either party.

The collaboration agreement will specifically outline the support provided by the support facility. Key elements include:

1. Task distribution: allocation of responsibilities for carrying out each of the subtasks that have been defined as well as the extent to which they will be covered and possible support that might be expected.
2. Follow-up meetings: depending on the kind of support to be provided the frequency and duration of the follow-up meetings should be established.

This will, on one side, allow the consortium to evaluate the work expected to be done by the participant and, on the other, understand the support that could be expected for task development and the necessary resources for the development of the project. This also has the objective of allowing participants to assess and allocate the resources, which shall also be included in the agreement.

This phase will end with the approval of the collaboration agreement by both parties.

4. Support Implementation

To achieve the goal of supporting 30 DH sites, the support facility follows a structured workflow to ensure a systematic progress from the initial project definition to the final implementation. This workflow represents the third step (Support Implementation) of the methodology explained in section 2.1, detailing how the consortium partners and selected district heating operators will collaborate to develop and implement the case studies.

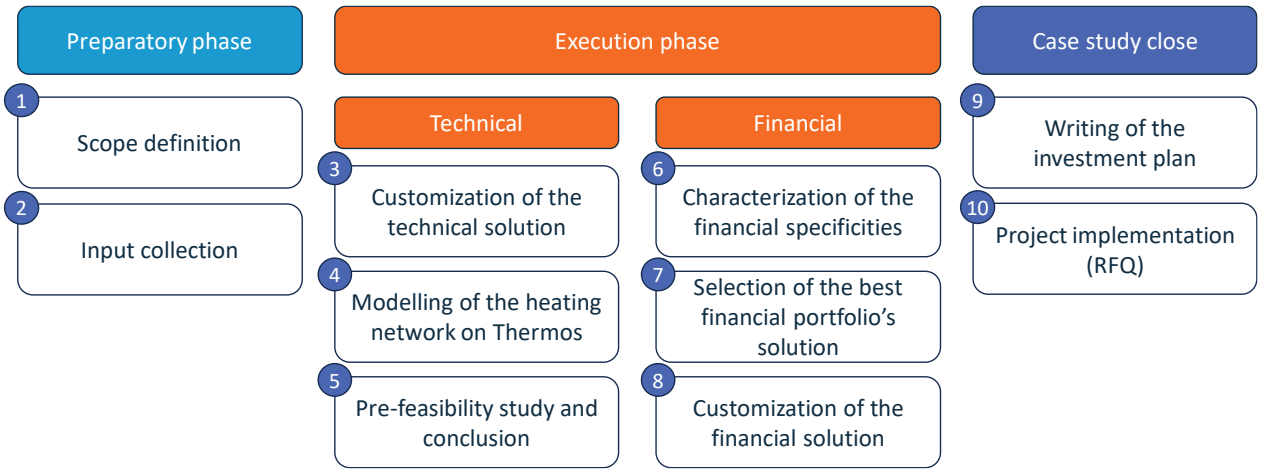


Figure 5 - Low2HighDH working process for Case Studies

The working process for the case studies will be:

1. **Scope definition**
   The workflow begins with defining the scope and objectives of each project. Initial discussions with selected district heating operators take place during ramp-up meetings to establish a clear understanding of the project's goals and the roles of all stakeholders.
2. **Input collection**
   Consortium partners work with the applicants to gather necessary technical, financial, and regulatory data.
3. **Customisation of the technical solution**
   Following data collection, the workflow focuses on tailoring technical solutions to fit the specific conditions (room and resources available) and requirements of each district heating site. This involves consortium partners conducting evaluations of the current district heating systems.
4. **Modelling of the heating network on THERMOS or other tools**
   This phase involves using the THERMOS software for detailed network modelling. Consortium partners and applicants collaborate to visualize and plan the optimal layout and operation of the heating system.
5. **Analysis of pre-feasibility study and conclusions**
   Following the technical assessment, pre-feasibility studies are conducted to evaluate the potential solutions. These studies assess the technical and economic viability of the proposed solutions, including a comprehensive cost-benefit analysis.
6. **Characterisation of the financial specificities**
   The next step focuses on identifying and analysing the financial aspects unique to each project. Consortium partners work with applicants to conduct an analysis of the financial resources available for each DH site.
7. **Selection of the best financial portfolio's solution**
   Once the financial specifics are characterised, the next step is to choose the feasible financial solutions from the available options. Consortium partners and applicants collaborate to develop a portfolio of financial solutions suitable for each district heating site, including grants, loans, and private investments.
8. **Customisation of the financial solution**

In this phase, the selected financial solutions are customized to match the specific needs of each project. Consortium partners and applicants may adjust the funding structures or timelines to better align with the project objectives and constraints.

9. **Writing of the investment plan**
   Based on the analysis and selected financial solutions, an investment plan is written to detail the financial strategy, expected costs, and funding sources.
10. **Project implementation (RFQ)**
    Finally, the technical and financial solutions are implemented. This phase includes the preparation and release of Requests for Quotation (RFQ) to identify suitable contractors and service providers for the project execution.

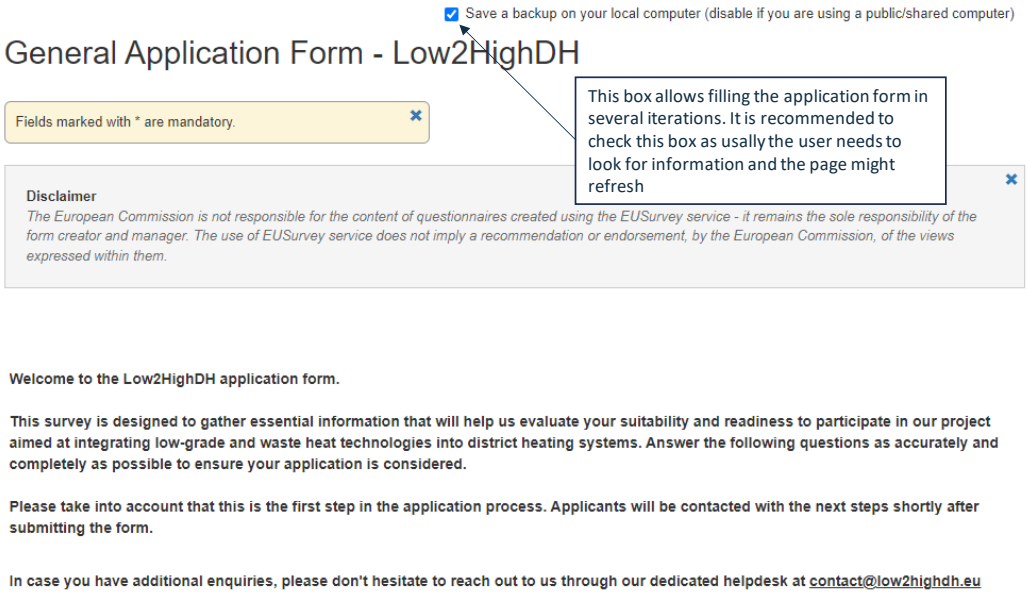
Annex A: Application form walkthrough

This annex provides a step-by-step walkthrough of the application form, aiming to ease the applicant's user journey and to solve possible doubts that may appear when completing the form. This chapter contains screenshots of the different sections that could be found, which may have relevant tips for filling the form in a swift way. However, if applicants have further doubts, these can always be addressed by contacting the project's helpdesk.

1.1 Steps for the completion of the Application Form

1. Introduction to the Application

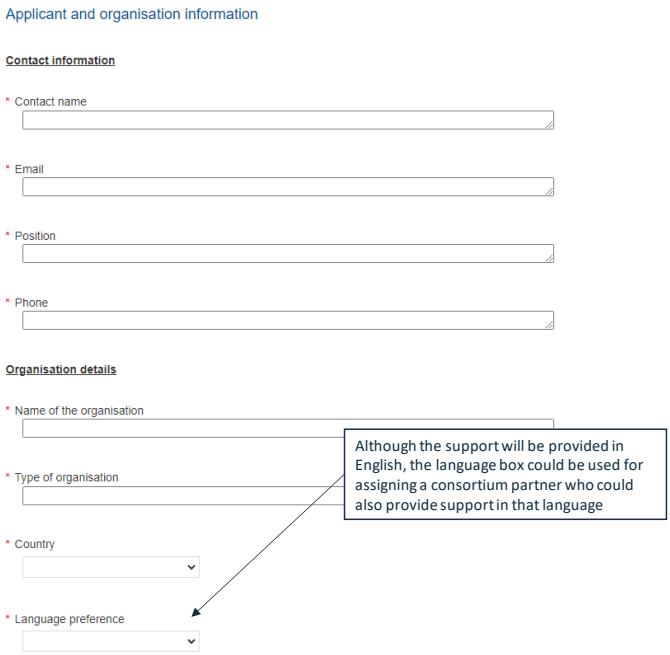
The application form begins with an overall introduction that presents the project aim of the Low2HighDH project and the specific objectives of the application form.



2. Applicant information

On the one hand, applicants must provide contact details for a designated company member who will be the primary point of contact with the Low2HighDH consortium. This includes name, email address, position and phone number.

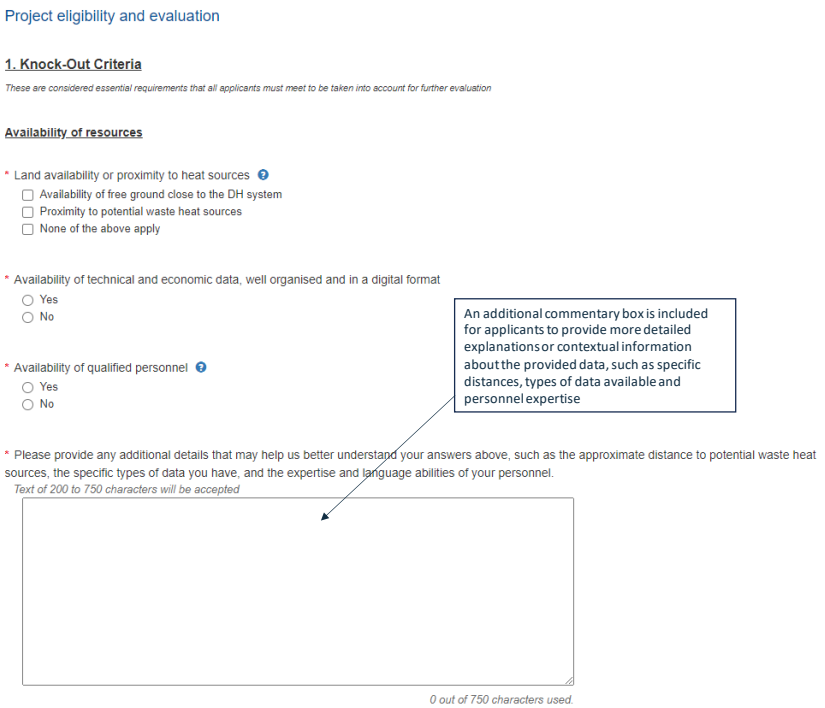
On the other hand, it is required to provide information about the applicant's organisation, such as the name, type, country and language preference.



3. **Knock-out criteria**

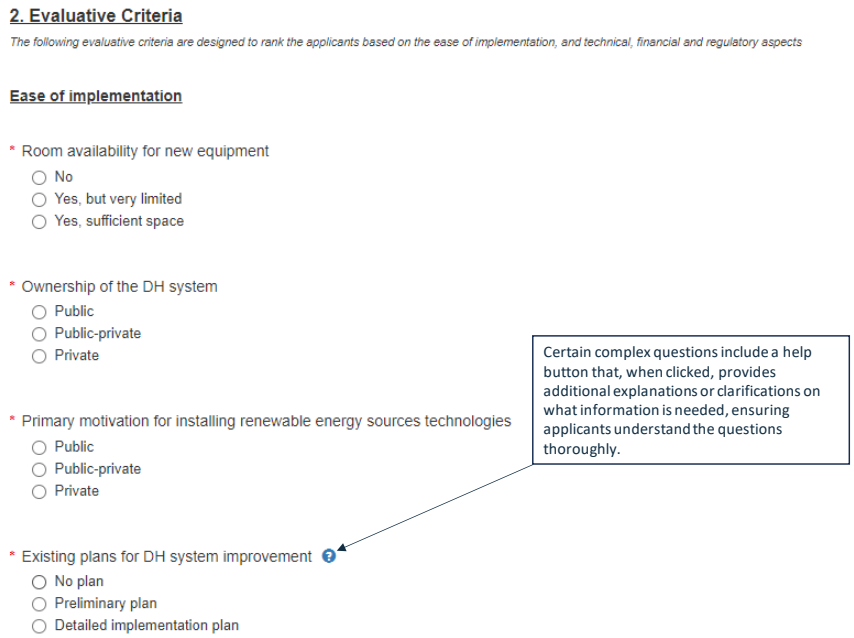
In this section, organisations must meet certain baseline requirements to proceed further in the application process. These are termed Knock-Out Criteria. Details such as the proximity to potential waste heat sources, availability of technical and economic data and the qualifications of key personnel are requested.

If applicants successfully meet the Knock-Out Criteria, additional sections of the form become accessible.

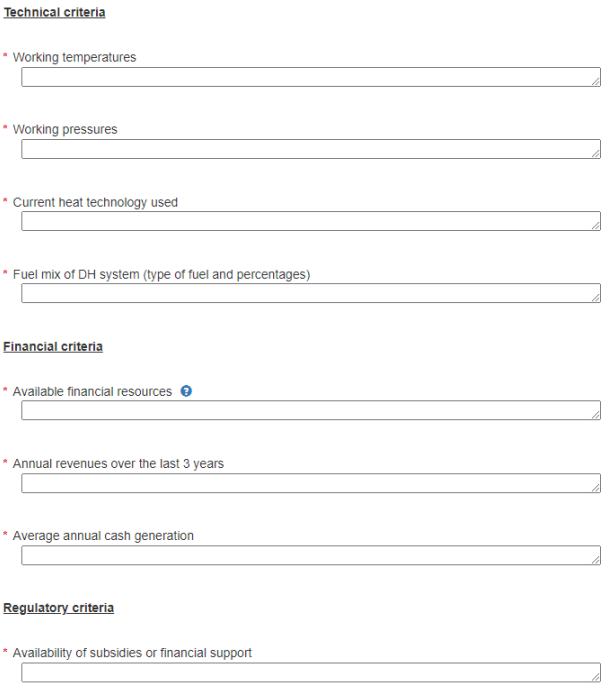


4. Evaluative Criteria

The first part corresponds to the ease of implementation. Applicants are asked about factors such as room availability for new equipment, ownership structure of the DH system, primary motivations for installing RES sources and any existing plans for DH system improvements.



Following the assessment of implementation ease, applicants are asked to provide detailed information on technical, financial and regulatory aspects.



As in the previous section, applicants are encouraged to provide further explanations or clarifications regarding their answers using the commentary box.

5. Submission

Before submitting their application, applicants are advised to thoroughly review their entries to ensure accuracy and completeness. Applicants must tick a box to confirm their acceptance of being contacted about receiving support from the Low2HighDH project.