

ACTIVITY COMPLETION REPORT

Technical Assistance to EBRD in development of e-learning courses based on updated course material on EE/RES financing

RWP 11
Priority: Top

**INOGATE Technical Secretariat and Integrated Programme in support of the
Baku Initiative and the Eastern Partnership energy objectives**

Contract No 2011/278827

A project within the INOGATE Programme

Implemented by:

Ramboll Denmark A/S (lead partner)
EIR Global sprl.
The British Standards Institution
LDK Consultants S.A.
MVV decon GmbH
ICF International
Statistics Denmark
Energy Institute Hrvoje Požar

Document title	Activity Completion Report Technical Assistance to EBRD in development of e-learning courses based on updated material on EE/RES financing (RWP 11)
Document status	Final

	Name	Date
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1 PART 1 – EUROPEAN COMMISSION

1.1 Background

Assignment Title:	Technical Assistance to EBRD in development of e-learning courses based on updated material on EE/RES financing (RWP 11)
Country and Dates:	Eastern Europe
Beneficiary Organisation:	<p>INO GATE beneficiaries:</p> <p>Bankers in banks and credit organizations Lenders of funds to EE/RES projects; Policy makers i.e. providing support for SE policies by increasing the numbers of EE/RES projects implemented in the region.</p> <p>Cooperation organization for this activity:</p> <p>EBRD Austrian Consultancy company (e7) who will develop SEFF e-learning solution for EBRD</p>
Beneficiary Organisation - key contact persons – name and e-mail address	<p>EBRD: Ian Smith, Senior Manager, EE and Climate Change (smithi@ebrd.com)</p> <p>e7: Klemens Leutgöb (klemens.leutgoeb@e-sieben.at)</p>
Deliverables Produced	<ul style="list-style-type: none"> • " Review report" (sub-task A) comprising a review of the initial / draft E-learning Training Programme being developed by the EBRD-Consultants (e7) • "Handover report" (sub-task B) comprising a review of the ITS Training material - along the lines of the amount of content, type of content, format of content (video/ text) – and addressing areas where the training could be supplemented to strengthen the E-learning Training Programme. • Videos of one of the trainers who took part in the ITS Trainings. • Videos of three selected Participants who participated in some of the ITS Trainings.
Expert Team Members	<ul style="list-style-type: none"> • Wolfgang Lutz • Werner Weihs-Raabl, Bank trainer(involved in pat ITS training courses) • Eva Born Rasmussen, E-learning expert • Heikki L.A. Noro, Banking expert

1.2 Essence of the Activity

During 2012-2013 and into early 2014 ITS developed and implemented a number of training courses for bankers in Partner Countries (PCs). The trainings were held as five day modules and were taught by the then Key Expert 3 and two to four (different) senior experts contracted for the specific trainings which took place in Armenia, Azerbaijan and Georgia. There were requests for training courses from Moldova and Ukraine which were never met because the formalities in terms of participants' qualifications and numbers could not be complied with.

In early 2014 it was confirmed with the European Commission (EC) to discontinue providing these training courses and to make the training materials available to the EBRD so that it could be further developed as e-learning modules in such a way that the materials would be branded as joint EC and EBRD materials. The end beneficiaries will be those banks and bankers in the PCs using the e-learning training in the framework of the loans and credit facilities made available by the EBRD.

The overall objective of this Activity has been to support the continuation of the concept of the Bankers Training in EE/RES financing topics - initiated through the ITS Programme - by providing technical assistance that will strengthen the future E-learning Training Programme that is being developed by EBRD. The specific objective of the assignment has been to:

- Assist in Handover of ITS Training Materials on EE/RES financing in Eastern Europe developed by ITS INOGATE to EBRD;
- Provide Video Support to E-Learning Training Programme;
- Review E-Learning Training Programme being developed or;
- Review of the existing ITS Training materials inclusive of proposals for changes in the contents and summarizing lessons learned to be used as input for the EBRD development of e-learning courses on EE/RES;
- Provide in-put to EBRD on E-Learning Training Programme being developed by EBRD;
- Provide in-put for future video support to E-Learning Training Programme.

1.3 Key Findings

The key findings related to the past training material are summarized below. Please refer to the 'handover' document for complete remarks.

Summary of lessons learned, identified gaps and suggestions for change in relation to:

The structure of the training i.e. agenda, trainers and course partners	<ol style="list-style-type: none"> 1. The 'bigger picture' of EE/RES financing should be made very clear. 2. The structure of the course should be linked closely to the objective for the course. 3. There needs to be in-depth examples of specific EE/RES projects 4. The 'Point of view' (i.e. trainer or someone supplying the information to the trainer) must be clear 5. It must be clear what role any course partners for the training have 6. Prepare with the banks before the course 7. Follow-up with the banks after the course
The organizational context for the training	<ol style="list-style-type: none"> 8. Make the organizational context for the training clear but only give 'relevant' information
The training on EE/RES and EE/RES financing	<ol style="list-style-type: none"> 9. The specific nature of EE/RES financing should be pointed out 10. Explain the 'drivers' for EE/RES investments 11. Explain EE/RES from many perspectives 12. Participants' role vs. course content 13. Training on climate change keep closely to IPCC material and EU political decisions on the matter. 14. Updated local information on climate change mitigation and adaptation should be given 15. Terminology should be carefully chosen and closely linked to EU decisions and related EU directives 16. Examples from specific banks are useful, e.g. . check-lists used for assessing EE/RES projects 17. Introduction to EU initiatives / incentives on EE/RES needs to be clear and practical 18. Clarity on rationale and drivers for EE/RES investments and detailed training on 'drivers' 19. Training on effective communication on EE/RES needs to be designed to be relevant to the users, e.g. bankers, developers, agencies.
The information on specific banks and their approach to EE/RES	<ol style="list-style-type: none"> 20. Good with bank-specific information to make the challenges of EE/RES financing clearer 21. Targeted information and cases on the most pressing needs and local circumstances 22. Highlight EE/RES as new opportunities 23. Make the overall picture of financing institutions and instruments clear 24. Provide EU – local country comparison to understand the incentives/reluctance for financing EE/RES solutions 25. Describe EU facilities for market based financing 26. Present EE/RES financing and subsidy programs systematically

Summary of lessons learned, identified gaps and suggestions for change in relation to:

	27. Relate to current debates impacting local financing
The training on EE/RES financing	28. Ensure details for the checklists are provided for example via videos
	29. Country specific information very useful
	30. Profitability calculations used in the same way in training is crucial to the effectiveness of the training
	31. Focus on relevant EE/RES financing information
	32. Additional information is needed to give more complete picture.
	33. Make TTT practical and less complex to be useful for e-learning.
The training on EE/RES projects	34. Project examples are vital
	35. Project examples should be carefully chosen to fit needs
The EE/RES financing examples and exercises used in the training	36. Use what is taught
	37. Avoid isolated examples

1.4 Ownership and Benefits of the Activity

Overall the key cooperation partner for this activity has been EBRD with the goal to ease the way EBRD can take over the material when developing the e-learning courses.

In relation to the 'review' of the e-learning approach (sub-task A), the key beneficiaries has been the EBRD consultants (e7), getting support for the draft versions of intended target groups to address with the e-learning and the planned modules to be developed.

In relation to the 'handover' of the existing training material (sub-task B), the key cooperation partners beneficiaries have likewise been the EBRD consultants (e7), enabling them to fast and effectively re-use of existing training material and experiences from completed training events, as well as the lessons from trainers and trainees.

Finally the project has provided video materials which are meant to be included into the e-learning material being developed.

1.5 Recommendations

The key recommendations given for the e-learning courses being developed are summarized below. These recommendations have been provided to e7 in conference calls between the INOGATE team and e7. Please refer to the 'review' document for complete remarks. The review has been related to the following e7 files (the date in brackets indicates when the material was received for review):

- "EBRD SEFF E_Learning_Training Needs Analysis_v0 4_including customers" (March 24)
- "E_Learning_Training needs_Modules_v0.8.pptx" (April 12)

The recommendations are:

1. Select target groups. Differentiate between creating awareness of EE/RES financing and in-depth training on EE/RES financing and financing instruments and techniques such as SEFF. Be very selective what additional training will be provided to each group. Use modular approach to provide flexible packages and define the modules in parallel with the target groups.
2. Precise terminology: Is the target groups to be trained on SE, SE financing and/or SEFF?
3. Carefully choose terminology: SE or EE/RES?
4. Align the terminology with other SEFF information on EBRD web-site.
5. Differentiate in the development approach between training needs and training goals.
6. The modular development approach should relate both to the individual and the role level.
7. Branch managers in PFIs must be understand how to move towards project financing.
8. Training should take into account that for loan officers on retail level, it is lending pulled by demand.
9. Training related to SME clients, which are a new client group, should take into account that they have limited other longer term financing business.
10. Training related to corporate clients should take into account that for corporate clients, EE/RES means expansion of current banking business.
11. Modules are needed for a general introduction to the financing markets, players and instruments and their potential for EE/RES financing, to give the 'big picture'.

1.6 Challenges Faced

The key challenge has been that the timeline for respectively the handover and review (ending end April) takes place before any content creation by the EBRD consultants. Therefore the review has been made only on draft material from the EBRD consultants (e7) and the development of content in the videos have been made before it is clear what needs the consultant have.

1.7 Impact Matrix

	Impact	Indicator	Data source
Objectives			
To review the existing training material to identify any gaps both from a banking perspective and from the perspective of training delivery and recommend how to handle these gaps in e-learning; production of video clips	Effective re-use of existing training material and experiences from completed training events; lessons from trainers and trainees	Concerns raised in report from past training events addressed; feed-back provided in video clips	Reports from completed training events; video clips on file
Results			
Reviewed EE/RES training material with comments on gaps and ways to overcome them in e-learning; video clips illustrating lessons learned	Easing the EBRD in taking over the material and interfacing with EBRD consultants	Fast and effective take-over by EBRD	EBRD satisfaction survey
Recommendations for E-learning courses	Support to EBRD consultants	Usefulness of recommendations	EBRD satisfaction survey

2 PART 2 - BENEFICIARIES

2.1 Executive Summary

This project has focused at providing support for the direct beneficiary organization for this project: EBRD and the consultancy company (e7) who will develop SEFF e-learning solution for EBRD. This project has supported in the following way:

1. Handover of material: The extensive material from INOGATE 2011-2015 has been reviewed, gaps identified and suggestions made for how to use parts of the material in forthcoming e-learning solution. Furthermore video material has been provided, from which video clips might be used in up-coming e-learning solution. This includes videos with one of the bank trainers from the INOGATE courses, explaining the content of selected slides from the training material, as well as videos of three of the participants providing their experience and learning points from the videos. This 'handover' of the existing material can be used by the consultancy company e7 in a more effective take-over of the material and lessons learned.
2. Review of e7 deliverables: This project has provided on-going review of draft material from e7, including target groups for the SEFF e-learning and Course Design and overview on Instructional Methods.