WP 5. Innovative financial engineering

Marine Viale (Bax & Company)

PDA Learnings

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1. WP OVERVIEW

Main objective and partners involved

• To create a **common evaluation framework for public and private investors** which allows to mainstream the investment schemes towards the UCBE. **Offering advisory services on structuring and improving the bankability of the UCBE projects**.

• To ensure the **accomplishment of all the public procurement** related EU regulations by the procurers (LH cities), to **prepare the public procurement processes and instruments for a successful launch** (beyond the project) of the tendering processes to trigger investments in UCBE projects.

• Partners involved:
Roadmap HOOP financial PDA

Investment intake form

Project Maturity Level

Due Diligence

Circular Valuation Method

Investment proposal
Get your project funded and running

Innovation Public Procurement

Follow up meeting

Collection of all available information from other tasks of the HOOP project

Kick-off PDA

Intake meeting

FINISH

FINISH
Activities

Task 5.1 Creation and management of the CIB

Task 5.2 Creation of a Circular Evaluation Framework

Task 5.3 Due diligence process and Portfolio management by cities

Task 5.4 Economic impact assessment of HOOP in cities

Task 5.5 Open Market Consultation

Task 5.6 Selection of public procurement instruments
Creation of the CIB – Circular Investors Board

- Selection of 20 leading EU sustainable finance investors
- EU wide or regional focused
- Have an interest in bankable projects in the circular economy and bioeconomy
- Focus on co-developing tools and advising the cities on requirements for investments
Milestones

- Creation of the Circular Investors Board (CIB) + 5 online CIB meetings

- Two physical CID events:
  - *Porto, October 2022*
  - *Brussels, May 2023*

  Including panel discussions, workshops, matchmaking
Learnings so far

- **Co-design and validate**: the deliverables and activities with experts (i.e. investors) early on to align with market needs and produce relevant outputs

- **Plan**: an early-stage dissemination & exploitation strategy to ensure long-term 1) value generation 2) implementation of the innovative financing solutions

- **Monitoring**: Define and track financial / non-financial impact data generated across WP from an early stage

- **Impact**: facilitate collaborations with relevant initiatives to share experiences, explore synergies, and exchange best practices
Thank you!

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