



**ener2i – Energy Research to innovation:  
Reinforcing cooperation with ENP countries on bridging the gap  
between energy research and energy innovation**

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**Abstract**

To initiate or strengthen interaction between SMEs and research institutions in the field of energy efficiency (EE) and renewable energy sources (RES) in the ENP countries, four innovation contests will be carried out awarding 24 innovative project ideas with an innovation voucher. The voucher will offer a financial support of 4,000 € to acquire know-how and support services for project implementation.



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## Executive Summary

The Innovation Voucher Scheme (IVS) aims to establish and intensify cooperation between businesses and research institutions inside the 4 EaP countries (Armenia, Belarus, Georgia, Moldova) to enable knowledge transfer and thereby the development of new products and services in the areas of Renewable Energy Sources (RES) and Energy Efficiency (EE). Besides that, the voucher scheme should be proven as an effective tool to facilitate innovation activities in SMEs, to effectively support knowledge transfer from research to business and to stimulate innovation on regional level in the EaP countries.

Within the ener2i project, the innovation voucher scheme represents a module that directly supports innovation activities. Four separate competitions will be launched. SMEs and start-ups within the EaP countries are encouraged to develop innovative project ideas and to submit their proposals. All submitted proposals will be evaluated by an expert jury which selects the best 6 proposals per country (overall 24) which will be funded by an Innovation Voucher of 4.000 € each.

Each country will host one local brokerage event, where the winning teams get the chance to present their project ideas in front of international and national energy experts and to be awarded with the vouchers afterwards. During the project implementation, the local partners from the ener2i-consortium will monitor the project progress and support the project teams. After the implementation phase is completed, all teams have to prepare and submit a final project report which contains the major results and outcomes of the projects.

The overall time frame for the voucher competition varies from country to country according to local structures and conditions. The first competition (in Belarus) is scheduled for 66 weeks in total.

All partners of the ener2i consortium are involved in the Innovation voucher activities to guarantee the best possible results.

## 0 ABBREVIATIONS

ABBREVIATIONS	
AITT	Agency for Innovation and Technology Transfer (Moldova)
BIF	Belarusian Innovation Fund
DOW	Description of work
EE	Energy Efficiency
ee	ee energy engineers GmbH (Germany)
EECG	Energy Efficiency Centre Georgia
ENP	European Neighbourhood Policy
IV	Innovation voucher
IVC	Innovation voucher competition
IVS	Innovation voucher scheme
R&D	Research and development
RES	Renewable Energy Sources
SME	Small and medium sized enterprises
TTA	Technology Transfer Association (Armenia)
USP	Unique selling proposition
WP	Work package
ZSI	Zentrum für Soziale Innovation (Austria)

## 1 INTRODUCTION

### 1.1 AIMS OF INNOVATION VOUCHER SCHEME

The ener2i project includes several comprehensive modules to support innovation activities in the 4 EaP countries (Armenia, Belarus, Georgia, Moldova). Among the other modules, the IVS is an advanced and new instrument in particular intending to initiate R&D projects by providing direct financial support in an early stage of project development. Thus, the IV should be widely perceived as a pilot action that should be applied in a regular and sustainable manner at a later stage, following a first successful pilot implementation within the ener2i project.

The establishment and intensification of cooperation between businesses and research institutions within the EaP countries is the prior aim of task 5.2. For this purpose, an IVS will be set up, opening start-ups, spin-off and small and medium sized enterprises located in the 4 EaP countries the chance, to receive monetary support to purchase services in order to realise their innovative projects in the field of EE or RES. The IVS will signal SMEs that needed

knowledge and expertise is already available while also fostering a more demand oriented support outlook from knowledge providers.

In addition, the implementation of the IVS provides a practical transfer of methodological and procedural know-how to the involved agencies in the EaP partner countries to sustain and expand this method in their countries with own means beyond the end of the ener2i project.

## 1.2 INVOLVED PARTNERS

Partner	Country	Role
ee energy engineers GmbH (ee)	Germany	<ul style="list-style-type: none"> <li>• Leader task 5.2</li> <li>• Development of IVS</li> <li>• Supervision during implementation</li> </ul>
Zentrum für Soziale Innovation (ZSI)	Austria	<ul style="list-style-type: none"> <li>• Support Development of IVS</li> </ul>
Agency for Innovation and Technology Transfer (AITT)	Moldova	<ul style="list-style-type: none"> <li>• Local IV manager</li> </ul>
Belarusian Innovation Fund (BIF)	Belarus	<ul style="list-style-type: none"> <li>• Local IV manager</li> </ul>
Technology Transfer Association (TTA)	Armenia	<ul style="list-style-type: none"> <li>• Local IV manager</li> </ul>
Energy Efficiency Centre Georgia (EECG)	Georgia	<ul style="list-style-type: none"> <li>• Local IV manager</li> </ul>

**Table 1: Task 5.2 IVS, involved ener2i partner.**

### Jury

Task of the jury is the assessment of the content of the submitted IV proposals based on the provided evaluation templates and the nomination of 6 winning teams per country. The jury will receive the pre-assessed proposals from the IV managers, proceed with their task and report the results to the task leader subsequently.

The jury is foreseen to consist of 7 members (5 from EU partners, 2 from ENP countries). Normally, the 5 members from EU partners will participate permanently during all 4 IVC. The 2 representatives from the EaP countries will be appointed for the single evaluation of the IVC within their country and consequently change from EaP country to EaP country.

The jury members have to have a proper expertise in the field of EE and/or RES and/or innovation, resulting from their academic or business background and have a long term work experience in their field to be capable of examining the proposals properly. All project partners are called upon to nominate suitable candidates for jury participation to the task leader. Selection and nomination of candidates will be done by ee and ZSI based on the received nominations and own suggestions.

## IV managers

Task of the IV managers is the operational implementation of IVS inside the EaP countries with all the corresponding objectives. IV managers are representatives of the local ener2i partners, which will in particular be responsible for:

- Nominating suitable candidates for the jury
- Organising, promoting and executing the IVC
- Preparing promotion material, organising promotion campaigns and events as deemed necessary
- Assisting the candidates during the proposal preparation
- Supporting the collection of proposals to be submitted via the ener2i website
- Pre-assessment of documents for the eligibility criteria (English language, completeness of documentation, etc.) and a pre-selection of IV proposals
- Organisation and execution of an award ceremony for 6 winning teams, including a presentation session for the IV project ideas during the local ener2i brokerage event
- Issuing of contracts for beneficiaries
- Management of all budget related issues (e.g. evaluation of eligibility criteria, transfer of pre-payments and final payments, possible reclaims of funds)
- Monitoring of project progress during the implementation phase
- Collecting final project reports, evaluation and forwarding to ee and ZSI

### 1.3 INTENDED RESULTS

By implementing a first successful IVC, all stakeholders involved should be convinced of the IVS concept as an efficient tool to facilitate innovation activities in SMEs, to effectively support knowledge transfer from research to business, and to stimulate innovation on regional level in the EaP countries. The pilot action should become a good practice example.

The 24 initiated cooperation projects within the IVS should therefore serve as a basis for further activities beyond the duration of the ener2i project. The involved IV managers in the 4 EaP countries should be motivated and enabled to organise and implement similar innovation support activities as the IVS on their own after the ener2i projects ends in order to continue a useful innovation support.



## 1.4 CONNECTION WITH OTHER WORK PACKAGES

Within the ener2i project, the IVS is complementing several intended activities and tools, organised in other WPs. First of all, there is a direct connection to task 5.1 (innovative thinking workshop). Task 5.1 is in charge of developing and carrying out workshops in the four EaP countries on the latest innovation approaches. Together with the IVS concept (task 5.2) both tasks form WP5, summarised under the title “Strengthen innovative thinking”. In addition, connections to the tasks 3.1 (local brokerage) and 4.1 (innovative training workshop) are given as well. The events among tasks 3.1, 4.1, 5.1, 5.2 with international attendances are merged to one period of action in each country to limit the travel expenses and will therefore take place subsequently within a few days. These event bundles serve as a platform for awarding the Innovation Vouchers in each EaP country.

## 2 CONCEPT

### 2.1 COMPETITION FRAMEWORK

To generate a large number of IVC participants and to enable the jury to evaluate the proposals with acceptable effort it will be necessary, to develop and implement an IVS that is limited to the most necessary terms of reference. The competition will be carried out with an administratively light procedure that allows a broad range of proposals with different topics and which has also certain flexibility. The overall guidelines are listed in Table 2:

IVC - framework	
Topics	<ul style="list-style-type: none"> <li>• Research topics/themes/challenges and project ideas in the field of EE and RES</li> </ul>
Target countries	<ul style="list-style-type: none"> <li>• Armenia, Belarus, Georgia, Moldova</li> </ul>
Scope	<ul style="list-style-type: none"> <li>• 4 national contests (1 in each target country)</li> <li>• All on a similar set of regulations (framework, conditions, duration of IV implementation, etc.)</li> <li>• Competitions will be launched at different time intervals, depending on each EaP</li> </ul>
Budget	<ul style="list-style-type: none"> <li>• Total of 24 IV</li> <li>• 6 per target country, 4,000 € each</li> </ul>
General terms of participation	<ul style="list-style-type: none"> <li>• See chapter 2.2, General terms of participation</li> </ul>
Participants	<ul style="list-style-type: none"> <li>• Start-ups &amp; SMEs according to EC-definition</li> <li>• Registration of a business is a pre-condition at time of IV submission</li> </ul>
Evaluation process	<ul style="list-style-type: none"> <li>• Pre-assessment (checking K.O.-criteria)</li> <li>• Final assessment (evaluation of proposals content)</li> </ul>

Evaluation criteria (final assessment)	<ul style="list-style-type: none"> <li>• Consortium structure</li> <li>• Project outline (2 pages)</li> <li>• Business plan (3 pages)</li> </ul>
Funding criteria	<ul style="list-style-type: none"> <li>• Implementation-oriented research and development activities and services</li> </ul>
Communication Strategy	<ul style="list-style-type: none"> <li>• Acquirement of IV candidates</li> <li>• Communication of activities</li> <li>• Dissemination of results</li> </ul>
IVC duration	<ul style="list-style-type: none"> <li>• Depending on country: BY – 4months, etc.</li> </ul>
Events	<ul style="list-style-type: none"> <li>• Competition kick-off (promotion event - optional)</li> <li>• Award ceremony connected to local ener2i brokerage event (event awarding the 6 winning teams)</li> </ul>
Web-presence	<ul style="list-style-type: none"> <li>• Ener2i website and websites of local partners will be major communication instrument</li> <li>• Proposal submission fully electronic via ener2i website</li> <li>• Necessary documents available for download</li> </ul>

**Table 2: IVC - framework.**

In addition, Table 3 gives an overview of the upcoming phases during the IVC execution:

<b>IVC – procedure</b>	
Preparation	<ul style="list-style-type: none"> <li>• Recruiting of Jury members</li> <li>• Preparation of IVC documents: concept, Terms of Reference, template for IV contract, template for final IV report</li> <li>• Preparation of submission forms at ener2i website</li> <li>• Preparation of IVC launch</li> </ul>
Competition	<ul style="list-style-type: none"> <li>• Competition launch/announcement</li> <li>• Proposal preparation phase</li> <li>• Proposal submission</li> <li>• Eligibility check and pre-selection of IV proposals</li> <li>• Proposal evaluation</li> <li>• Selection of winning project teams</li> </ul>
Realisation	<ul style="list-style-type: none"> <li>• Preparation and conclusion of contracts with the selected IV projects</li> <li>• Award ceremony</li> </ul>

	<ul style="list-style-type: none"> <li>• Implementation of projects</li> <li>• Monitoring of progress and support during IV project implementation (e.g. answering financial questions, etc.)</li> </ul>
Finalisation	<ul style="list-style-type: none"> <li>• Collecting final project reports</li> <li>• Report assessment</li> <li>• Preparation of deliverable 5.3 (summary report on voucher implementation)</li> </ul>

**Table 3: IVC - procedure.**

## 2.2 GENERAL TERMS OF PARTICIPATION

All applying teams have to strictly meet the following conditions in order to participate in the IVCs:

- All IVC related documents have to be prepared in English language
- Businesses have to be officially registered in the particular country where the IVC participation takes place
- No projects will be funded that have already been funded by another funding initiative for the same tasks.
- Beneficiary has to be a Small or Medium Sized Enterprise (SME), which is cooperating with a research partner
- Beneficiaries have to sign a contract regulating the IV project and all monetary related issues before receiving funds
- Eligible costs of up to 4,000 € will be reimbursed.
- Beneficiaries receive 60 % pre-payment (2,400 €) after signing the contract
- Reimbursement of the outstanding 40 % (1,600 €) at the end of the 6 month implementation period is based on submission of the final report.
- Project implementation (usage of voucher funds) has to be accomplished within 6 months after receiving the pre-payment
- Beneficiaries have to report on achieved results and impact of vouchers (project report of up to 2 pages, up to 1 page financial report on use of funds, plus annexes – e.g. photos)
- The competition procedure does not fall under the authority of the (Armenian, Belarusian, Georgian, Moldovan) public procurement law. No legal right shall be constituted by this competition procedure. Any recourse to courts of law is excluded

## 2.3 INNOVATION VOUCHER PARTICIPANTS

Eligible to participate in the IVC are SMEs, including start-up businesses, and new companies established by researchers, with energy related innovation targets. This may concern innovations in renewable energies, or the aim to improve the energy efficiency performance. SMEs have to cooperate with a research partner. Project teams are approved for participation as long as they meet the European Commission's definition<sup>1</sup> of small and medium sized enterprise stated in declaration (2003/361/EC), which is illustrated in Figure 1.

THE NEW THRESHOLDS (Art. 2)			
Enterprise category	Headcount: Annual Work Unit (AWU)	Annual turnover	Annual balance sheet total
Medium-sized	< 250	≤ €50 million (in 1996 € 40 million)	≤ €43 million (in 1996 € 27 million)
Small	< 50	≤ €10 million (in 1996 € 7 million)	≤ €10 million (in 1996 € 5 million)
Micro	< 10	≤ €2 million (previously not defined)	≤ €2 million (previously not defined)

Figure 1: SME definition of European Commission.

## 2.4 EVALUATION CRITERIA

The evaluation criteria are the basis for the assessment of submitted proposals. The criteria consist of two parts (pre-assessment and final assessment) which serve different objectives. Based on the evaluation procedure, six proposals out of each country will be selected by the jury to be awarded with an IV. In order to enable a consistent evaluation for all four target countries, the assessment procedure, evaluation criteria as well as the time condition (6 month implementation procedure) will be identical.

<sup>1</sup> SME – definition: European Commission - EN NB-60-04-773-EN-C 92-894-7909-4 – „The new SME definition – User guide and model declaration”.

### **Pre-assessment**

In a first step the eligibility of proposal to enter the evaluation procedure will be checked. This eligibility check will be performed by the respective IV managers in each of the four EaP target countries. Both parts of the proposal, as well as the compliance to the general terms of participation will be subject to appraisal. The decision, whether a proposal is suitable for participation or not, will be based on adherence to the following criteria:

- General terms of participation
- On-time submission (depending on the countries fixed deadline)
- Proposal completeness (containing project outline of up to 2 pages and business plan of up to 3 pages and other required information)
- Topic relatedness (innovation in the field of EE or RES)
- Language requirements (all components in English language)
- Proposer is an SME and will collaborate with a research organisation in the IV project

Above mentioned requirements represent K.O.-criteria. If an IV proposal does not match all the eligibility criteria the project team will be excluded, regardless of the proposal's content and quality.

After screening all received proposals, the IV managers will forward the approved documents to the jury for the final assessment. In case that the amount of approved proposals exceeds 15, the IV managers will give preference to the 15 proposals presenting the most promising innovations. The assessment of the potential of the innovations will be done by the two experts of the local IV managers, who will participate in the international jury. They will apply the evaluation criteria for the IV scheme outlined below in their assessment.

### **Final assessment**

The final assessment (of positively pre-assessed proposals) will be done by an international and independent jury of EE, RES and innovation experts. The jury is supposed to evaluate the structure of consortium, the intended knowledge transfer, the quality of innovative ideas, the feasibility of project implementation and the impact resulting from vouchers. The explicit evaluation criteria are stated in Table 4.

All 7 jury members will evaluate the proposals separately and remotely according to a given scoring model presented in an evaluation template. The individual results of this evaluation will be handed over to the task leader and will be combined into a ranking list. The ranking list will be established according to the scores received in the evaluation, and the six IV proposals with the highest scores will be identified as the 6 winning teams. Based on the

assessment results per country, the identified six teams will be invited to present their project ideas at the local ener2i brokerage event and to receive an IV.

Originally, the description of work foresaw 2 types of documents to be subject of proposal assessment, and in addition a presentation in front of the jury for selecting the winners:

1. Project outline
2. Business plan
3. Project presentation (back to back with award ceremony)

At the kick-off meeting of the ener2i project, the consortium decided by consensus to streamline the evaluation procedure and not to evaluate the project presentation. The IV award ceremony and presentation of projects will take place during the local brokerage event in each EaP country, and will only be used for PR purposes for the winning projects.

Document	Evaluation criteria	Points
General information/ Consortium	<b>International cooperation</b> (cooperation with international partners, promotion of international networking)	<b>10</b>
	<b>Knowledge transfer/Quality of consortium</b> (quality of cooperation between SME and research organisation, true collaboration effort, track record of involved institutions)	<b>10</b>
Innovation idea/ Project outline	<b>Innovation</b> (quality of innovation, difference to existing technologies/solutions, expected impact)	<b>20</b>
	<b>Utilisation of results</b> (possible transformation into product or services)	<b>20</b>
Business plan	<b>Quality of the business plan</b> (quality of implementation planning, justification of usage of IV budget)	<b>20</b>
	<b>Economic success</b> (market potential, market development strategy)	<b>20</b>

**Table 4: Evaluation criteria.**

## 2.5 FUNDING CRITERIA

To ensure an effective use of the IV, a set of rules has to be defined. The following funding criteria therefore provide a clear guidance to select services that are eligible to be financed by the IV.

### **Eligible services**

- R&D services, necessary to develop innovative products or services such as:
  - Technology and market surveys
  - Feasibility studies
  - Material and design studies, studies regarding manufacturing technologies
  - Studies and concepts addressing topics such as market access and distribution
  - Energy and innovation audits
- Implementation-oriented R&D activities such as:
  - Construction or engineering services
  - Build-up of prototypes
  - Environmental compatibility
  - Travel costs (e.g. for cooperation with international partners)
  - Material & equipment

The above described services can be acquired from domestic and foreign research and development organisations.

## **2.6 COMMUNICATION STRATEGY**

Communication strategy will be a major success factor of IVS. An adequate communication strategy will have to deal with several issues which can be summarised into two groups of objectives:

- Inform, inspire and acquire suitable candidates prior to the competition
- create a positive image and attitude towards the voucher scheme among interested stakeholders inside and outside the ener2i consortium through proper dissemination activities

To gather the project results and to develop a final report for communication purposes will be the objective of an independently upcoming deliverable (D5.3 - Summary report on the implementation of the 24 innovation vouchers). The dissemination of the 24 project results will therefore be done on basis of D5.3.

### **Candidate acquisition**

The identification of suitable candidates for the IVC will be crucial. The expert workshops in the EaP countries in WP2 have served already the purpose to make potential proposers and other stakeholders aware of the upcoming IV scheme and to disseminate IV information. In order to reach the right target groups (SMEs) properly and to convince them to enter the competition, an announcement of IVC will not be enough and additional measures will have to be taken on a country specific basis: e.g. promotion of the IV scheme via Innovation Agencies, SME Agencies, NGOs and governmental organisations in the field of EE/RES, Chambers of Commerce, technology transfer offices, research organisations, mapping of EE/RES stakeholders done by ener2i (in cooperation with NO-GAP and other R2I projects, etc.

### **Communication activities**

IVS has the potential to become a Unique Selling Proposition (USP) for the ener2i project (and indeed, it became to some extent already!). An IVS is a pretty new instrument that has only rarely been used in similar projects so far. As an advanced support tool for small scale innovation support, it completes the comprehensive activities within ener2i project to a holistic set of tools to bridge the gap between new energy research and industry, and between EU and EaP countries. It is crucial to embed the IVS communication activities into the general dissemination measures to ensure an aligned appearance and identical arguments.

The actual communication work for IVC on the generic level will be done via the ener2i website. At this place, information about the IVC will be published and necessary documents (see Annex 1) will be available for download. In addition, the whole submission process will be hosted. Information and materials will be standardised (as far as possible) for all 4 IVC and can therefore be handled by a centralised structure. IV information and competition announcements will be mirrored at the websites of the EaP partners, and if necessary be made available in local language. The IV dissemination, the local brokerage and IV award ceremony will be organised and carried out on the local level by the IV managers. The IV managers can deal best with country specific issues and therefore are the personnel in charge of the communication on this level.

## **3 DOCUMENTS/WEBSITE**

### **Documents**

Standardised templates for most of documents required for IVS will be developed by the ener2i consortium to enable a smooth implementation. They will be available for download at the project website. A detailed list with the foreseen templates is included in Annex 1.



## **Website**

Besides the usage as a communication instrument, the ener2i website will also serve as platform to manage the proposal submission online. The Tool "LimeSurvey" will be used to programme a web interface that offers the possibility to enter the required information directly into the online database. The overall handling (tracking the deadlines of submission, management of documents etc.) will be simplified significantly herewith.

## **4 PROPOSED TIME FRAME/EVENTS**

### **Time frame**

The overall duration of the Innovation Voucher Scheme is scheduled for 66 weeks. The IVS will therefore be facilitated in the four EaP countries consecutively and partly in parallel, meaning that the indicative time frame which is shown in Figure 2, will be implemented four times on a separate basis, one time in each country and adapted to the local needs. A significant amount of time is dedicated to the competition and project realisation stages (together about 52 weeks).

The tentative time-schedule for the IVC implementation is the following:

Submission period: from launch of the IV competition to submission deadline: 4-16 weeks (Belarus will need 16 weeks, launch of IVC foreseen for end of April 2014, other countries will need less time here).

Evaluation & Selection: 4-10 weeks

IV project implementation: up to 24 weeks

The detailed overview regarding the time schedule is stated in Figure 2.



## **Events**

The announcement of the IVC (milestone 1) will be done by the IV Managers, optional it can be undertaken via a launch event, organised for dissemination and PR purposes. During this event, all needed informations regarding the IVC will be presented and IV participants will be recruited (see chapter 2.6). The ener2i brokerage event (milestone 2) in each EaP country will be used to award the winning teams and to provide the awardees with a possibility to present their project ideas and to hand over the IV. This event is related to WPs 3 and 4 in particular. The beneficiaries have to sign a contract declaring the strict observance of the funding criteria.

Optional, a third event can be hosted, which should be connected to the final ener2i event in Brussels at the end of the ener2i project. This event can be used to select and honour the best/most successful project funded by the IV. Whether or not this option will be used should be discussed in the ener2i consortium.

<b>IVC – award events</b>	
Belarus	2014, 14-17 Oct.
Moldova	2014, 24-27 Nov.
Georgia	2015, June
Armenia	2015, Autumn

**Table 5: IVC - award events.**

## **APPENDIX**

- Annex 1: Innovation Voucher Scheme - tasks and responsibilities
- Annex 2: Terms of Reference Innovation Voucher Competition